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# Industries Common Resources Developer Guide

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# CONTENTS

<b>Chapter 1: Industries Common Resources</b> .....	<b>1</b>
AI Accelerator and Scoring Framework .....	<b>3</b>
AI Accelerator .....	<b>3</b>
Scoring Framework .....	<b>83</b>
Action Launcher .....	<b>100</b>
Action Launcher Tooling Objects .....	<b>100</b>
Action Launcher Metadata Types .....	<b>105</b>
Actionable List Members .....	<b>110</b>
Actionable List Members Connect APIs .....	<b>111</b>
Actionable List Members Key Performance Indicator Bar Objects .....	<b>142</b>
Actionable List Members Metadata Types .....	<b>148</b>
Actionable List Members Tooling Objects .....	<b>153</b>
Actionable Segmentation .....	<b>158</b>
Actionable Segmentation Standard Objects .....	<b>158</b>
Actionable Segmentation Custom Objects .....	<b>186</b>
Actionable Segmentation Metadata API Types .....	<b>189</b>
Business Rules Engine .....	<b>196</b>
Expression Set .....	<b>196</b>
Decision Table .....	<b>306</b>
Decision Explainer for Expression Set .....	<b>351</b>
Lookup Tables .....	<b>374</b>
Collections and Recovery .....	<b>469</b>
Collections Data Model .....	<b>469</b>
Collections Standard Objects .....	<b>469</b>
Context Service .....	<b>480</b>
Context Service Metadata API Types .....	<b>480</b>
Context Service Tooling API Objects .....	<b>497</b>
Context Persistence Platform Event .....	<b>525</b>
Context Service Business APIs .....	<b>526</b>
Context Service Apex Reference .....	<b>593</b>
Criteria-Based Search and Filter .....	<b>603</b>
Metadata API Types .....	<b>603</b>
Tooling API Objects .....	<b>615</b>
Business APIs .....	<b>625</b>
Data Processing Engine, Batch Management, and Monitor Workflow Services .....	<b>645</b>
Data Model .....	<b>646</b>
Common Tooling API Object .....	<b>647</b>
Common Platform Event .....	<b>653</b>
Common Business APIs .....	<b>655</b>

## Contents

Data Processing Engine .....	657
Batch Management .....	695
Monitor Workflow Services .....	712
Digital Lending .....	723
REST Reference .....	723
Digital Lending Invocable Actions .....	777
Digital Lending Metadata API Types .....	784
Digital Lending Apex Reference .....	785
Discovery Framework .....	793
Discovery Framework Standard Objects .....	794
Discovery Framework Metadata API Types .....	849
Discovery Framework Invocable Actions .....	856
Discovery Framework Tooling API Objects .....	860
Discovery Framework Connect APIs .....	864
DiscoveryFramework_Prefill Integration Procedure .....	891
Decision Explorer .....	894
Decision Explorer Business APIs .....	894
Decision Explorer Tooling API Objects .....	901
Decision Explorer Metadata API Types .....	912
Einstein Relationship Insights .....	921
Einstein Relationship Insights Standard Objects .....	921
Einstein Standard Invocable Actions .....	926
Initiate Natural Language Processing Action .....	926
Engagement .....	928
Engagement Data Model .....	929
Engagement Connect APIs .....	944
Apex Reference .....	964
Integrate the Engagement Objects Into Your CTI System .....	989
Group Membership and Households .....	993
Group Membership and Households Data Model .....	993
Group Membership and Households Standard Objects .....	994
Group Membership and Households Business APIs .....	1014
Identity Verification .....	1043
Identity Verification Connect APIs .....	1044
Identity Verification Data Model .....	1051
Identity Verification Metadata API .....	1063
Identity Verification Tooling API Objects .....	1072
Intelligent Document Reader .....	1088
Intelligent Document Reader Standard Objects .....	1088
Apex Reference .....	1108
Intelligent Document Reader Business APIs .....	1120
OCR Metadata API Types .....	1154
OCR Tooling API Objects .....	1165
Intelligent Document Reader Standard Invocable Actions .....	1184

## Contents

Intelligent Form Reader	1197
Intelligent Form Reader Standard Objects	1197
Intelligent Form Reader Business APIs	1216
Intelligent Form Reader Metadata API Types	1250
Intelligent Form Reader Tooling API Objects	1260
Intelligent Form Reader Standard Invocable Actions	1278
Interest Tagging	1291
Interest Tagging Business APIs	1291
Omnistudio Business APIs	1310
REST Reference	1310
Outcome Management Developer Guide	1362
Introduction to Outcome Management	1362
Outcome Management Data Model	1362
Outcome Management Standard Objects	1363
Outreach List	1392
Outreach List Connect APIs	1392
Record Alerts	1399
Record Alerts Standard Objects	1400
Apex Reference	1425
Record Alerts APIs	1432
Record Alerts Metadata API Types	1450
Record Alerts Tooling API Objects	1454
Record Rollup Definitions	1461
Record Rollup Definitions Standard Objects	1462
Record Rollup Definitions Business APIs	1465
Record Rollup Definitions Metadata API Types	1473
Record Rollup Definitions Tooling API Objects	1480
Scheduled Reminders	1490
Scheduled Reminders Standard Objects	1490
Scheduled Reminders Business APIs	1500
Sentiment Insights	1517
Sentiment Insights Standard Objects	1517
Service Process Studio	1521
Service Process Studio Metadata Types	1522
Apex Reference	1533
Service Process Studio Invocable Actions	1552
Service Process Studio Connect APIs	1555
Service Process Studio Connect API Use Cases	1565
Timeline	1569
Timeline Standard Object	1569
Timeline Tooling API Object	1575
Virtual Calls	1579
Virtual Calls Standard Objects	1579
Associated Objects	1585

## Contents

StandardObjectNameChangeEvent .....	1586
StandardObjectNameFeed .....	1589
StandardObjectNameHistory .....	1597
StandardObjectNameOwnerSharingRule .....	1602
StandardObjectNameShare .....	1606
IndustriesSettings .....	1610
Industries Object Access by Community License .....	1624
Access Industries Features Deployed Using Managed Packages .....	1636

# CHAPTER 1 Industries Common Resources

## In this chapter ...

- [AI Accelerator and Scoring Framework](#)
- [Action Launcher](#)
- [Actionable List Members](#)
- [Actionable Segmentation](#)
- [Business Rules Engine](#)
- [Collections and Recovery](#)
- [Context Service](#)
- [Criteria-Based Search and Filter](#)
- [Data Processing Engine, Batch Management, and Monitor Workflow Services](#)
- [Digital Lending](#)
- [Discovery Framework](#)
- [Decision Explainer](#)
- [Einstein Relationship Insights](#)
- [Einstein Standard Invocable Actions](#)
- [Engagement](#)
- [Group Membership and Households](#)
- [Identity Verification](#)
- [Intelligent Document Reader](#)
- [Intelligent Form Reader](#)
- [Interest Tagging](#)

Certain feature sets are shared across industries. This guide contains developer documentation to help you put those features to work.

## Industries Common Resources

- [Omnistudio Business APIs](#)
- [Outcome Management Developer Guide](#)
- [Outreach List](#)
- [Record Alerts](#)
- [Record Rollup Definitions](#)
- [Scheduled Reminders](#)
- [Sentiment Insights](#)
- [Service Process Studio](#)
- [Timeline](#)
- [Virtual Calls](#)
- [Associated Objects](#)
- [IndustriesSettings](#)
- [Industries Object Access by Community License](#)
- [Access Industries Features Deployed Using Managed Packages](#)

# AI Accelerator and Scoring Framework

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Use the Scoring Framework developer resources to build and deploy generic propensity models for multiple Industries cloud use cases. Also, use the AI Accelerator developer resources to configure and deploy Einstein Discovery models.

## AI Accelerator

Building machine learning use cases becomes quick, easy, and more maintainable with AI Accelerator. Customize the default configuration of your use cases by updating the machine learning models and feature extractors that suit your requirements. Save the extracted features and scoring responses. Use the AI Accelerator Connect API to generate predictions in real time.

## Scoring Framework

Use the Scoring Framework developer resources to define the template configurations that are used to create CRM Analytics apps. Generate scores for your predictive use cases using the preconfigured recipes and Einstein Discovery models installed with the CRM Analytics apps.

## AI Accelerator

Building machine learning use cases becomes quick, easy, and more maintainable with AI Accelerator. Customize the default configuration of your use cases by updating the machine learning models and feature extractors that suit your requirements. Save the extracted features and scoring responses. Use the AI Accelerator Connect API to generate predictions in real time.

### AI Accelerator Standard Objects

Use the standard objects to configure your use case by defining the feature extractor, the machine learning model, and the objects and fields for saving the prediction results for your use case.

### AI Accelerator Platform Event

Use the `AIScoringStatusEvent` event to notify subscribers after a scoring job is processed.

### AI Accelerator Business APIs

Use the AI Accelerator Business APIs to get real-time score predictions for a machine learning use case model.

### AI Accelerator Predictions API Using Apex

This AI Accelerator Predictions API is also exposed to Apex. You can access/invoke this API from within your Apex class to get realtime prediction results.

### Apex Reference

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

### AI Accelerator Metadata Types

Use the AI Accelerator metadata types to set up your machine learning use case. Define machine learning models, feature extractors, and the objects and fields for saving the prediction results for your use case.

### AI Accelerator Tooling 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](#).

## AI Accelerator Standard Objects

Use the standard objects to configure your use case by defining the feature extractor, the machine learning model, and the objects and fields for saving the prediction results for your use case.

### [AIFeatureExtractor](#)

Represents information about the feature extractor that's used to extract the input data required for making predictions. This object is available in API version 55.0 and later.

### [AIUsecaseDefinition](#)

Represents a collection of fields to set up the use case for which real-time predictions are to be made. This object is available in API version 55.0 and later.

### [AIUsecaseFieldMapping](#)

Represents information about the field mapping that's used to save extracted features, prediction scores, insights about the predictions, and suggestions to improve the prediction scores. This object is available in API version 55.0 and later.

### [AIUsecaseModel](#)

Represents information about the machine learning models that generate predictions for your use case. This object is available in API version 55.0 and later.

### EDITIONS

Available in: Lightning Experience

Available when the admin settings for AI Accelerator and for the product related to the use case are enabled. The Salesforce org must have the CRM Plus license and the product's CRM license.

## AIFeatureExtractor

Represents information about the feature extractor that's used to extract the input data required for making predictions. This object is available in API version 55.0 and later.

## Supported Calls

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

## Special Access Rules

The `AIFeatureExtractor` object is available when the admin settings for AI Accelerator and for the product related to the use case are enabled. The Salesforce org must have the CRM Plus license and the product's CRM license.

## Fields

Field	Details
<code>AiUsecaseModelId</code>	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The use case model that's related to the feature extractor. This field is a relationship field.</p> <p><b>Relationship Name</b> <code>AiUsecaseModel</code></p>

Field	Details
	<b>Relationship Type</b> Lookup <b>Refers To</b> AIUsecaseModel
BatchInputSourceIdentifier	<b>Type</b> string <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> The identifier of the input source containing batch job-computed features that a model can use to generate predictions. Available in API version 57.0 and later.
BatchInputSourceType	<b>Type</b> picklist <b>Properties</b> Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update <b>Description</b> The input source of the features computed in batch jobs. Possible values are: <ul style="list-style-type: none"> <li>CRMA</li> <li>Data Cloud</li> </ul> The default value is CRMA.
ClassName	<b>Type</b> string <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> The ID of the Apex class created for the feature extractor.
DeveloperName	<b>Type</b> string <b>Properties</b> Create, Filter, Group, Sort, Update <b>Description</b> The developer name of the feature extractor.
FeatureInputType	<b>Type</b> picklist

Field	Details
	<p><b>Properties</b> Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> Required. The type of feature input that's used in generating predictions. Available in API version 57.0 and later.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• Batch_And_Realtime_Input</li> <li>• Batch_Input</li> <li>• Realtime_Input</li> <li>• Sample_Input</li> </ul> <p>The default value is Realtime_Input.</p>
InputContext	<p><b>Type</b> textarea</p> <p><b>Properties</b> Create, Nillable, Update</p> <p><b>Description</b> The features that serve as the context for the feature extractor in the JSON or CSV file. Available in API version 57.0 and later.</p>
Language	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The languages that are supported by the feature extractor.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• da—Danish</li> <li>• de—German</li> <li>• en_US—English</li> <li>• es—Spanish</li> <li>• es_MX—Spanish (Mexico)</li> <li>• fi—Finnish</li> <li>• fr—French</li> <li>• it—Italian</li> <li>• ja—Japanese</li> <li>• ko—Korean</li> <li>• nl_NL—Dutch</li> <li>• no—Norwegian</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>pt_BR—Portuguese (Brazil)</li> <li>ru—Russian</li> <li>sv—Swedish</li> <li>th—Thai</li> <li>zh_CN—Chinese (Simplified)</li> <li>zh_TW—Chinese (Traditional)</li> </ul>
MasterLabel	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The label of the feature extractor.</p>
NamespacePrefix	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> Namespace prefix associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix.</p>
Type	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> Required. Specifies the type of the feature extractor. Possible values are:</p> <ul style="list-style-type: none"> <li>APEX</li> <li>HYBRID</li> <li>JAVA</li> </ul> <p>The default value is APEX.</p>

## Usage

Use this object to configure feature extractors for your use case model when it requires features that are calculated or aggregated on run-time. A use case model can have multiple feature extractors.

## AIUsecaseDefinition

Represents a collection of fields to set up the use case for which real-time predictions are to be made. This object is available in API version 55.0 and later.

### Supported Calls

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

### Special Access Rules


The AIUsecaseDefinition object is available when the admin settings for AI Accelerator and for the product related to the use case are enabled. The Salesforce org must have the CRM Plus license and the product's CRM license.

### Fields

Field	Details
CreatorType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> Required. The type of user who created the use case definition that's used by AI Accelerator. Available in API version 57.0 and later.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>INTERNAL_USER</li> <li>SALESFORCE_ADMIN</li> </ul> <p>The default value is INTERNAL_USER.</p>
DeveloperName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The developer name of the use case definition.</p>
Language	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The languages supported by the use case definition.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>da—Danish</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>• de—German</li> <li>• en_US—English</li> <li>• es—Spanish</li> <li>• es_MX—Spanish (Mexico)</li> <li>• fi—Finnish</li> <li>• fr—French</li> <li>• it—Italian</li> <li>• ja—Japanese</li> <li>• ko—Korean</li> <li>• nl_NL—Dutch</li> <li>• no—Norwegian</li> <li>• pt_BR—Portuguese (Brazil)</li> <li>• ru—Russian</li> <li>• sv—Swedish</li> <li>• th—Thai</li> <li>• zh_CN—Chinese (Simplified)</li> <li>• zh_TW—Chinese (Traditional)</li> </ul>
MasterLabel	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The label of the use case definition.</p>
MaximumInsightCount	<p><b>Type</b> int</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The maximum number of insights that can be returned by the scoring response.</p>
MaximumRecommendationCount	<p><b>Type</b> int</p> <p><b>Properties</b> Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The maximum number of recommendations that can be returned by the Next Best Action Strategy. This field is available in API version 56.0 and later.</p>

Field	Details
MaximumSuggestionCount	<p><b>Type</b> int</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The maximum number of suggestions that can be returned by the scoring response.</p>
NamespacePrefix	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> Namespace prefix associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix.</p>
PrimaryResponseObject	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, False, Sort, Update</p> <p><b>Description</b> The primary object in which the scoring response is saved based on the specified field mapping.  A primary response object can be any standard object that is allowed by the use case's cloud or any custom object.</p>
RecommendationResponseObject	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, False, Sort, Update</p> <p><b>Description</b> The object in which the recommendations created by the Next Best Action Strategy are saved.</p>
RecommendationSource	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The tool or platform that generates recommendations. Available in API version 57.0 and later.  Possible values are:</p> <ul style="list-style-type: none"> <li>• Next_Best_Action_Flow</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>• None</li> </ul> <p>The default value is <code>Next_Best_Action_Flow</code>.</p>
SecondaryResponseObject	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, False, Sort, Update</p> <p><b>Description</b> The object in which the scoring response is saved based on the specified field mapping.</p> <p> <b>Note:</b> A secondary response object can be any standard object that is allowed by the use case's cloud or any custom object.</p>
ShouldSaveFeatures	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> Indicates whether to save the features extracted for the scoring request. The default value is <code>false</code>.</p>
ShouldSaveInsights	<p><b>Type</b> boolean</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> Indicates whether to save the prediction insights used to generate the score. The default value is <code>false</code>.</p>
ShouldSaveRecommendation	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> Indicates whether to save the recommendations created by the Next Best Action Strategy. The default value is <code>false</code>.</p>
ShouldSaveScore	<p><b>Type</b> boolean</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Sort, Update</p>

Field	Details
	<b>Description</b> Indicates whether to save the prediction score. The default value is <code>false</code> .
<code>ShouldSaveSuggestions</code>	<b>Type</b> boolean <b>Properties</b> Defaulted on create, Filter, Group, Sort, Update <b>Description</b> Indicates whether to save the suggestions for improving the prediction score. The default value is <code>false</code> .
<code>SuggestionImpactMinimumPct</code>	<b>Type</b> int <b>Properties</b> Filter, Group, Nillable, Sort, Update <b>Description</b> The minimum eligible percentage for improving the existing prediction score based on suggestions. Suggestions with an impact greater than the specified percentage on the score are displayed on the prediction scorecard.
<code>UsecaseName</code>	<b>Type</b> string <b>Properties</b> Create, Filter, Group, idLookup, Sort, Update <b>Description</b> Required. The name of the use case. This field is unique within your organization

## Usage

Specify whether to save extracted features, prediction scores, insights about predictions, and suggestions to improve the prediction scores. You can then specify the objects where you want to save them. You can also define maximum number of insights, suggestions, and recommendations to get from the machine learning model.

## AIUsecaseFieldMapping

Represents information about the field mapping that's used to save extracted features, prediction scores, insights about the predictions, and suggestions to improve the prediction scores. This object is available in API version 55.0 and later.

## Supported Calls

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

## Special Access Rules

The AIUsecaseFieldMapping object is available when the admin settings for AI Accelerator and for the product related to the use case are enabled. The Salesforce org must have the CRM Plus license and the product's CRM license.

## Fields

Field	Details
Additional Information	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The additional information that displays extra custom attributes alongside the prediction score.</p>
AiUsecaseDefinitionId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> Required. The ID of the use case definition that's related to the field mapping. This field is a relationship field.</p> <p><b>Relationship Name</b> AiUsecaseDefinition</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> AIUsecaseDefinition</p>
DeveloperName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The developer name of the use case field mapping.</p>
JoinFieldInformation	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p>

Field	Details
	<p><b>Description</b></p> <p>The information about the field from the Data Model Object of Data Cloud that stores a reference to the object's record for which the prediction result is read.</p>
Language	<p><b>Type</b></p> <p>picklist</p> <p><b>Properties</b></p> <p>Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b></p> <p>The languages supported by the use case field mapping.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• da—Danish</li> <li>• de—German</li> <li>• en_US—English</li> <li>• es—Spanish</li> <li>• es_MX—Spanish (Mexico)</li> <li>• fi—Finnish</li> <li>• fr—French</li> <li>• it—Italian</li> <li>• ja—Japanese</li> <li>• ko—Korean</li> <li>• nl_NL—Dutch</li> <li>• no—Norwegian</li> <li>• pt_BR—Portuguese (Brazil)</li> <li>• ru—Russian</li> <li>• sv—Swedish</li> <li>• th—Thai</li> <li>• zh_CN—Chinese (Simplified)</li> <li>• zh_TW—Chinese (Traditional)</li> </ul>
MappedFieldName	<p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Sort, Update</p> <p><b>Description</b></p> <p>Required. The name of the field where the scoring response is stored.</p>
MappedFieldType	<p><b>Type</b></p> <p>picklist</p>

Field	Details
	<p><b>Properties</b> Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> Required. Specifies the type of the mapped field. Possible values are:</p> <ul style="list-style-type: none"> <li>• FEATURE</li> <li>• INSIGHT</li> <li>• PREDICTION_SCORE</li> <li>• SUGGESTION</li> </ul> <p>The default value is <code>FEATURE</code>.</p>
MasterLabel	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The label of the use case field mapping.</p>
ResponseFieldName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> Required. The name of the response object's field that's mapped to the field storing the scoring response.</p>
ResponseObject	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> Required. The object whose field is mapped to the field storing the scoring response. It's either the <code>PrimaryResponseObject</code> or the <code>SecondaryResponseObject</code> specified in the <code>AIUseCaseDefinition</code> object.</p>
SequenceNumber	<p><b>Type</b> int</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The sequence number for the information stored in the field mapping.</p>

## Usage

Use this object to define the mapping logic for saving extracted features, prediction scores, insights about the predictions, and suggestions to improve the prediction scores. Map the fields of the primary and secondary response objects, that are specified in the `AIUsecaseDefinition` object, with the fields that are storing these values.

## AIUsecaseModel

Represents information about the machine learning models that generate predictions for your use case. This object is available in API version 55.0 and later.

## Supported Calls

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

## Special Access Rules

The `AIUsecaseFieldMapping` object is available when the admin settings for AI Accelerator and for the product related to the use case are enabled. The Salesforce org must have the CRM Plus license and the product's CRM license.

## Fields

Field	Details
<code>AIFeatureExtractorId</code>	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The ID of the feature extractor that's used by the use case model. This field is a relationship field.</p> <p><b>Relationship Name</b> AIFeatureExtractor</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> AIFeatureExtractor</p>
<code>AIUsecaseDefinitionId</code>	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> Required. The ID of the use case definition that's related to the use case model. This field is a relationship field.</p>

Field	Details
	<p><b>Relationship Name</b> AiUsecaseDefinition</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> AIUsecaseDefinition</p>
ArePredctGenInRealTime	<p><b>Type</b> boolean</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> Required. Indicates whether the prediction results are generated in real time by using AI Accelerator or whether they are generated by Data Cloud and stored in a Data Model Object. If this attribute is set to false, AI Accelerator reads and returns already generated prediction results from Data Cloud.  The default value is <code>True</code>.</p>
DeveloperName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The developer name of the use case model.</p>
Language	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The languages supported by the use case model.  Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>da</code>—Danish</li> <li>• <code>de</code>—German</li> <li>• <code>en_US</code>—English</li> <li>• <code>es</code>—Spanish</li> <li>• <code>es_MX</code>—Spanish (Mexico)</li> <li>• <code>fi</code>—Finnish</li> <li>• <code>fr</code>—French</li> <li>• <code>it</code>—Italian</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>• ja—Japanese</li> <li>• ko—Korean</li> <li>• nl_NL—Dutch</li> <li>• no—Norwegian</li> <li>• pt_BR—Portuguese (Brazil)</li> <li>• ru—Russian</li> <li>• sv—Swedish</li> <li>• th—Thai</li> <li>• zh_CN—Chinese (Simplified)</li> <li>• zh_TW—Chinese (Traditional)</li> </ul>
MasterLabel	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The label of the use case model.</p>
NamespacePrefix	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> Namespace prefix associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix.</p>
PredictionDefinition	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, idLookup, Sort, Update</p> <p><b>Description</b> Required. The unique identifier of the prediction definition that's related to the use case model. This identifier can be an external ID. If you use Einstein Discovery to create models, this field stores the developer name of the record.  This field is unique within your organization.</p>
PredictionPlatform	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p>

Field	Details
	<b>Description</b> Required. The platform on which the machine learning model is created and deployed. Available in API version 57.0 and later. Possible values are: <ul style="list-style-type: none"> <li>• Default</li> <li>• Einstein_Discovery</li> </ul> The default value is Einstein_Discovery.

## Usage

Use this object to configure the machine learning model for your use case. A use case can have multiple models for better performance or for changing the model's objective.

## AI Accelerator Platform Event

Use the AIScoringStatusEvent event to notify subscribers after a scoring job is processed.

### [AIScoringStatusEvent](#)

Notifies subscribers when the scoring job started by the /services/data/{release version}/connect/aiaccelerator/predictions REST request, executed in asynchronous mode, is complete. This object is available in API version 55.0 and later.

### AIScoringStatusEvent

Notifies subscribers when the scoring job started by the /services/data/{release version}/connect/aiaccelerator/predictions REST request, executed in asynchronous mode, is complete. This object is available in API version 55.0 and later.

## Supported Calls

`describeSObjects()`

## Supported Subscribers

Subscriber	Supported?
Apex Triggers	✓
Flows	
Processes	
Streaming API (CometD)	✓

### EDITIONS

Available in: Lightning Experience

Available in Salesforce orgs when the admin settings for AI Accelerator and for the product related to the use case are enabled. The Salesforce org must have the CRM Plus license and the product's CRM license.

## Streaming API Subscription Channel

/event/AIScoringStatusEvent

### Special Access Rules

The AIScoringStatusEvent object is available only when AI Accelerator and Communications Cloud are enabled. The Salesforce org must also have the CRM Plus and CRM for Comms licenses enabled.

Field	Details
AIScoringRequestResponse	<b>Type</b> string <b>Properties</b> Create <b>Description</b> A unique ID of the scoring request.
EventUuid	<b>Type</b> string <b>Properties</b> Create <b>Description</b> Required. A universally unique identifier (UUID) that identifies a platform event message.
PrimaryResponseRecordList	<b>Type</b> textarea <b>Properties</b> Nillable <b>Description</b> The list of the primary object's records that store the scoring response based on the specified field mapping.
ReplayId	<b>Type</b> string <b>Properties</b> Create, Nillable <b>Description</b> Represents an ID value that is populated by the system and refers to the position of the event in the event stream. Replay ID values aren't guaranteed to be contiguous for consecutive events. A subscriber can store a replay ID value and use it on resubscription to retrieve missed events that are within the retention window.
SecondaryResponseRecordList	<b>Type</b> textarea

Field	Details
	<b>Properties</b> Create, Nillable  <b>Description</b> The list of the secondary object's records that store the scoring response based on the specified field mapping.
Status	<b>Type</b> picklist  <b>Properties</b> Create, Defaulted on create, Restricted picklist  <b>Description</b> Required. Specifies the status of the scoring request response. Possible values are: <ul style="list-style-type: none"> <li>• FAILURE</li> <li>• IN_PROGRESS</li> <li>• NEW</li> <li>• QUEUED</li> <li>• SUCCESS</li> </ul> The default value is NEW.
StatusDescription	<b>Type</b> string  <b>Properties</b> Create, Nillable  <b>Description</b> The message with the details of the request's latest status.

## AI Accelerator Business APIs

Use the AI Accelerator Business APIs to get real-time score predictions for a machine learning use case model.

### Overview

AI Accelerator is a real-time scoring platform that is meant to help you accelerate the development of use cases in Industries cloud applications and integrate with the underlying platforms, such as Einstein Discover (ED), Einstein Platform (EP), and Next Best Action (NBA).

You can pass the results from one platform to another and use the unique features of multiple platforms.. Some examples of such use cases include:

- In Comms Cloud, predict whether a customer switches to another service provider or not.
- In Health Cloud, predict if a patient shows up for a doctor's appointment.
- In Consumer Goods Cloud, predict which store visits can maximize profits.

Available resources are:

Resource	Description
<code>/connect/aiaccelerator/predictions</code>	Retrieve real-time scores prediction for a machine learning use case.
<code>/connect/aiaccelerator/recommendations</code>	Get recommendations with Einstein Next Best Action. You can now work on actionable next steps with a unified, synchronized view of real-time score predictions and recommendations.

### [REST Reference](#)

You can access AI Accelerator APIs using REST endpoints. These REST APIs follow similar conventions as Connect REST APIs.

## REST Reference

You can access AI Accelerator 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 AI Accelerator API resources.

### [Request Bodies](#)

Here's a list of AI Accelerator API request bodies.

### [Response Bodies](#)

Here's a list of AI Accelerator API response bodies.

## Resources

Here's a list of AI Accelerator API resources.

### [Predictions](#)

Retrieve real-time scores prediction for a machine learning use case.

### [Recommendations](#)

Get recommendations with Einstein Next Best Action. You can now work on actionable next steps with a unified, synchronized view of real-time score predictions and recommendations.

## Predictions

Retrieve real-time scores prediction for a machine learning use case.

## Components of AI Accelerator Predictions API

The components that make up the AI Accelerator real-time scoring API are:

- Configuration Resolution
- Feature Extractor

- Scorer
- DB Writer

### Configuration Resolution

For each API request, the API resolves the configuration values at run time in the following order:

- API request (highest priority)
- Admin configurations in setup BPOs. See [AI Accelerator](#).
- Use case configuration file setting

### Feature Extractor

This component is applicable to only those use cases where it's necessary to derive or calculate some features during run time. Just to clarify, features are the inputs to an ML model.

As an example, let's consider an ML use case that predicts the price of a real estate property. To do so, the ML model requires features, such as the property's square feet area, carpet area, location, number of bedrooms, construction year, and construction age.

Say all these features are available in the property's record except the construction age feature. In this case, the API invokes Feature Extractor to calculate the construction age in runtime by subtracting the construction year feature from the current year.

### Scorer

Scorer accepts features and uses the Einstein Discovery Predict API to interact with the ED platform for scoring the records.

### DB Writer

If you configure an ML use case for persistence, DB Writer persists the features, scores, and insights in the specified object and as per the specified field mapping in the [AIUseCaseFieldMapping](#) object.

The AI Accelerator Predictions API returns the following output components:

- A single prediction score per record, rawdata, recordoverrides, extractedrawdata, or extractedrecordoverrides.
- Details on how the score was arrived at through a maximum of three prediction insights, which helps end users understand the impact of various features on the scores.
- Prediction improvements to improve the score.

### Resource

```
/connect/aiaccelerator/predictions
```

### Resource example

```
https://yourInstance.salesforce.com/services/data/vXX.X/connect/aiaccelerator/predictions
```

### Available version

55.0

### Requires Chatter





No



### HTTP methods

POST

## Request body for POST


## Properties



Name	Type	Description	Required or Optional	Available Version
async	Boolean	Indicates whether the execution mode is <code>async</code> ( <code>true</code> ) or not ( <code>false</code> ).	Optional	55.0
columnNames	String[]	Comma-separated list of column names representing the columns that the model analyzes. These are the features that are inputs to the model for predicting the scores.	Optional  <b>Note:</b> This field is required when type is <code>rawdata</code> or <code>recordids</code> .	55.0
<del>enableFeaturePersistence</del>	Boolean	Indicates whether you want to persist the features ( <code>true</code> ) or not ( <code>false</code> ).	Optional  <b>Note:</b> This field is required only if raw data or when features are extracted.	55.0
<del>enableInsightPersistence</del>	Boolean	Indicates whether you want to persist the insights ( <code>true</code> ) or not ( <code>false</code> ).  <b>Note:</b> The <code>enableScorePersistence</code> field must be enabled to persist insights.	Optional	55.0
<del>enableScorePersistence</del>	Boolean	Indicates whether you want to persist the prediction scores ( <code>true</code> ) or not ( <code>false</code> ).	Optional	55.0
<del>enableSuggestionPersistence</del>	Boolean	Indicates whether you want to persist the suggestions ( <code>true</code> ) or not ( <code>false</code> ).  <b>Note:</b> The <code>enableScorePersistence</code> field must be enabled to persist suggestions.	Optional	55.0

Name	Type	Description	Required or Optional	Available Version
<del>enrichModelClassification</del>	Boolean	Indicates whether you want to retrieve the classification model type and the classification threshold ( <code>true</code> ) or not ( <code>false</code> ).	Optional	55.0
<del>enrichModelFeatures</del>	Boolean	Indicates whether you want to retrieve the model feature details, including label and data type ( <code>true</code> ) or not ( <code>false</code> ).	Optional	55.0
<del>enrichPredictionDefinition</del>	Boolean	Indicates whether you want to retrieve the prediction definition label ( <code>true</code> ) or not ( <code>false</code> ).	Optional	55.0
<del>featureColumnMap</del>	Map<String, String>	Represents the map that contains which features must be persisted and where they must be persisted. The key-value pair must contain: <ul style="list-style-type: none"> <li><code>key</code>—Feature name</li> <li><code>value</code>—ResponseObjects (configured in the Admin UI setup).FieldName</li> </ul>	Optional	55.0
<del>featureExtractorName</del>	String	The API name of the feature extractor record.	Optional <div>  <b>Note:</b> This field is required when the <del>usecaseModel</del> doesn't have a default Feature Extractor and the input type is <del>BatchedData</del> or <del>BatchRecords</del> </div>	55.0
<del>featureExtractionParameters</del>	Feature Extraction Parameters Field Map Value[]	Represents the input parameters that are required by the Feature Extractor to extract the features that a model requires to make the prediction. Supports a maximum of 200 records.	Optional <div>  <b>Note:</b> This field is required when the input type is <del>BatchedData</del> </div>	55.0

Name	Type	Description	Required or Optional	Available Version
<del>featureExtractorId</del>	<del>String</del>	<del>The ID of the feature extractor record from the <a href="#">AIFeatureExtractor</a> on page 4 object. The specified feature extractor is used to extract the features for the prediction.</del>	<del>Optional</del>	<del>55.0</del>
<del>historyReferencePoint</del>	<del>String</del>	<del>Represents a reference point for a comparison between current and previous prediction scores.</del>	<del>Optional</del>	<del>55.0</del>
inputType	String	<p>The type of input used to make the prediction. Supports a maximum of 200 records.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• <b>Records</b>—All the features for a model are present in the Salesforce database.</li> <li>• <b>RawData</b>—All the features for a model are provided in the API request itself.</li> <li>• <b>RecordOverrides</b>—The API reads a part of the features for the model from the Salesforce database by using the specified record Id. The remaining features are provided in the API request as raw data.</li> <li>• <b>ExtractedRawData</b>—The API computes some or all the features for the model at runtime using the configured Feature Extractor, others can be passed as raw data in the API request.</li> <li>• <b>ExtractedRecordOverrides</b>—The API computes some features for the model at run time by using the configured Feature Extractor. For the remaining features, the API refers to the Salesforce database through the specified record ID.</li> </ul>	Required	55.0

Name	Type	Description	Required or Optional	Available Version
<code>insightColumnMap</code>	<code>Map&lt;String, String&gt;</code>	Represents the map that contains which insight's Name/Value must be persisted, and to which object they must be persisted. The key-value pair must contain: <ul style="list-style-type: none"> <li><code>key</code>—INSIGHT1.Name / INSIGHT1.Value (up to maximum of 3 insights Name/Value)</li> <li><code>value</code>—ResponseObjects (configured in the Admin UI setup).FieldName</li> </ul>	Optional	55.0
<code>insightsSettings</code>	<code>Map&lt;String, Integer&gt;</code>	A map for configuring insight settings. Here are the settings that contribute to the prediction score: <ul style="list-style-type: none"> <li><code>maxInsights</code>—Maximum number of insights that you want the machine learning model to generate.</li> <li><code>maxSuggestionCount</code>—Maximum number of suggestions that you want the machine learning model to generate.</li> <li><code>suggestionImpactMinimumPct</code>—Minimum eligible percentage for improving the prediction score based on suggestions.</li> </ul> For more information, see <a href="#">Define Maximum Suggestions and Insights</a> in the AI Accelerator Admin Guide.	Optional	55.0
<code>predictionDefinition</code>	String	The developer name or API name from the DiscoveryGoal object.	Required	55.0
<code>rawData</code>	<a href="#">Raw Data Input Wrap[]</a>	A two-dimensional array of row values in which each row is a comma-separated list of values for features provided in <code>columnNames</code> . Supports a maximum of 200 records.	Optional	55.0

 **Note:** This field is required when the input type is `RawData` or `ReadOveride`.

Name	Type	Description	Required or Optional	Available Version
records	String[]	The IDs of the Salesforce record that is used as input features for model to make the prediction.	Optional  <b>Note:</b> This field is required when the input type is Records, RecordIds, or BatchRecords	55.0
<del>scorePersistedColumn</del>	String	The name and value of the score that must be persisted, and to which object it must be persisted. The valid format is ResponseObject.FieldName.	Optional.  <b>Note:</b> This field is required when <del>enablePersist</del> is set to true. If <del>enablePersist</del> is true and the value isn't specified, the score column map from the setup page is used by default.	55.0
suggestionColumnMap	Map<String, String>	Represents the map that contains which suggestions Name/Value must be persisted, and to which object they must be persisted. The key-value pair must contain: <ul style="list-style-type: none"> <li><b>key</b>—SUGGESTION1.Name / SUGGESTION1.Value (maximum of 5 suggestions Name/Value)</li> <li><b>value</b>—ResponseObjects (configured in the Admin UI setup).FieldName</li> </ul>	Optional	55.0

Name	Type	Description	Required or Optional	Available Version
usecaseDefinition	String	The ID of the usecase definition record from the <a href="#">AIUsecaseDefinition</a> on page 8 object.	Optional	55.0
usecaseDevname	String	The API name of the usecase definition record.	Required	55.0

### JSON example

An example of inputType as Records.

```
{
  "usecaseDevname": "AIUsecaseDefinitionIdentifier",
  "predictionDefinition": "PredictionDefinitionIdentifier",
  "inputType": "Records",
  "records": {
    "wrappedList": [
      "a00x0000000CHa0AAG"
    ]
  },
  "insightsSettings": {
    "insightsSettings": {
      "maxSuggestionCount": 1,
      "maxInsights": 1,
      "suggestionImpactMinimumPct": 0
    }
  },
  "insightColumnMap": {
    "columnMap": {
      "INSIGHT1.Name": "Demo__c.InsightName1Override__c",
      "INSIGHT1.Value": "Demo__c.InsightValue1__c",
      "INSIGHT1.Impact": "Demo__c.InsightImpact1__c"
    }
  },
  "suggestionColumnMap": {
    "columnMap": {
      "SUGGESTION1.Name": "Demo__c.RecommendationName1__c",
      "SUGGESTION1.Value": "Demo__c.RecommendationValue1__c",
      "SUGGESTION1.Impact": "Demo__c.RecommendationImpact1Override__c"
    }
  },
  .."scorePersistenceColumn": "Demo__c.Score__c",
  .."enableInsightPersistence": true,
  "enableScorePersistence": true,
  .."enableSuggestionPersistence": true,
  "async": false
}
```

An example of inputType as RawData.

```
{
  "usecaseDevname": "AIUsecaseDefinitionIdentifier",
```

```

"predictionDefinition": "PredictionDefinitionIdentifier",
"inputType": "RawData",
"columnNames": {
  "wrappedList": [
    "corp_year_week__c",
    "sap_source_id__c",
    "sap_ppg_id__c",
    "sales_units__c"
  ]
},
"rawData": {
  "rawData": [
    {
      "rawDataInputWrap": {
        "rawDataInput": [
          "202016",
          "0YQx0000000CaS8GAK",
          "01tx00000006j2DAAQ",
          "20"
        ]
      }
    },
    {
      "rawDataInputWrap": {
        "rawDataInput": [
          "202016",
          "0YQx0000000CaS8GAK",
          "01tx00000006j2DAAQ",
          "20000"
        ]
      }
    }
  ]
},
"featureColumnMap": {
  "columnMap": {
    "corp_year_week__c": "Demo__c.YearWeekFeature__c",
    "sap_source_id__c": "Demo__c.StoreIdFeature__c",
    "sap_ppg_id__c": "Demo__c.ProductIdFeature__c",
    "sales_units__c": "Demo__c.SalesUnitsFeatureOverride__c"
  }
},
"enableFeaturePersistence": true
}

```

An example of inputType as RecordOverrides.

```

{
  "usecaseDevname": "AIUseCaseDefinitionIdentifier",
  "predictionDefinition": "PredictionDefinitionIdentifier",
  "inputType": "RecordOverrides",
  "records": {
    "wrappedList": [
      "a00x0000000CHa0AAG"
    ]
  }
}

```

```

    },
    "columnNames": {
      "wrappedList": [
        "corp_year_week__c",
        "sap_source_id__c",
        "sap_ppg_id__c",
        "sales_units__c"
      ]
    },
    "rawData": {
      "rawData": [
        {
          "rawDataInputWrap": {
            "rawDataInput": [
              "202016",
              "0YQx0000000CaS8GAK",
              "01tx00000006j2DAAQ",
              "20"
            ]
          }
        },
        {
          "rawDataInputWrap": {
            "rawDataInput": [
              "202016",
              "0YQx0000000CaS8GAK",
              "01tx00000006j2DAAQ",
              "20000"
            ]
          }
        }
      ]
    }
  }
}

```

An example of inputType as ExtractedRawData.

```

{
  "usecaseDevname": "AIUsecaseDefinitionIdentifier",
  "predictionDefinition": "PredictionDefinitionIdentifier",
  "inputType": "ExtractedRawData",
  .."featureExtractorDevName": "featureExtractorIdentifier",
  "featureExtractionParameters": {
    "featureExtractionParameters": [
      {
        "featureExtractionParametersMapValue": {
          "recordId": "01tx00000006j2DAAQ1",
          "rawData": {
            "corp_year_week__c": "202016"
          }
        }
      }
    ]
  }
}

```

```

    "enableFeaturePersistence": true
  }

```

An example of `inputType` as `ExtractedRecordOverrides`.

```

{
  "usecaseDevname": "AIUsecaseDefinitionIdentifier",
  "predictionDefinition": "PredictionDefinitionIdentifier",
  "inputType": "ExtractedRecordOverrides",
  "records": {
    "wrappedList": [
      "a00x0000000CHa0AAG"
    ]
  },
  .."featureExtractorDevName": "featureExtractorIdentifier",
  "featureExtractionParameters": {
    "featureExtractionParameters": [
      {
        "featureExtractionParametersMapValue": {
          "recordId": "01tx00000006j2DAAQ1"
        }
      }
    ]
  }
}

```

### Response body for POST

[Prediction Output](#)

### Recommendations

Get recommendations with Einstein Next Best Action. You can now work on actionable next steps with a unified, synchronized view of real-time score predictions and recommendations.

### Resource

```
/connect/aiaccelerator/recommendations
```

### Example

```
https://yourInstance.salesforce.com/services/data/vXX.X/connect/aiaccelerator/recommendations
```

### Available version

56.0

### Requires Chatter

No

### HTTP methods

POST

### Request body for POST

#### JSON example

```

{
  "usecaseDefinitionName": "ChurnPredictionRealTime",

```

```

    "strategyName": "flow_sample",
    "rcmdStrategyParameters": [
      {
        "recordId": "a02xx000001nd0RAAQ",
        "predictionScore": 96
      }
    ],
    "maxRecommendationsCount": 1,
    "recommendationFieldMapping": {}
  }

```

### Properties

Name	Type	Description	Required or Optional	Available Version
canPersist Recommendations	Boolean	Indicates whether the recommendations are persisted ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> .	Optional	56.0
isAsync	Boolean	Indicates whether the execution mode is async ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> .	Optional	56.0
max Recommendations Count	Integer	The maximum recommendations to request. You can specify a maximum of four recommendations.	Optional	56.0
rcmdRecordId Persistence Column	String	The name of the column from the <code>PrimaryResponse</code> object that persists the recommendation record ID when the <code>canPersistRecommendations</code> property is set to <code>true</code> .	Optional	56.0
rcmdStrategy Parameters	Map<String, Object>[]	The list of parameters to pass to the flow action for the specified strategy to generate recommendations.	Required	56.0
recommendation FieldMapping	Map<String, String>	The field mapping that's used to store the recommendations when the <code>canPersistRecommendations</code> property is set to <code>true</code> .	Optional	56.0
strategyName	String	The name of the strategy.	Required	56.0
usecase Definition Name	String	The API name of the use case definition.	Required	56.0

### Response body for POST

#### Recommendation

## Request Bodies

Here's a list of AI Accelerator API request bodies.

### [Prediction Input](#)

Input representation of the features for which predictions are to be fetched.

### [Feature Extraction Parameters Map Value Input](#)

Input representation of the feature extraction parameters map.

### [Raw Data Input Wrap Input](#)

Input representation of the list of raw data input.




### [Recommendation Input](#)



Input representation of the recommendation request with Einstein Next Best Action.


## Prediction Input

Input representation of the features for which predictions are to be fetched.




### Properties

Name	Type	Description	Required or Optional	Available Version
<code>async</code>	Boolean	Indicates whether the execution mode is <code>async</code> ( <code>true</code> ) or not ( <code>false</code> ).	Optional	55.0
<code>columnNames</code>	String[]	Comma-separated list of column names representing the columns that the model analyzes. These are the features that are inputs to the model for predicting the scores.	Optional  <b>Note:</b> This field is required when type is <code>rawdata</code> or <code>readData</code> .	55.0
<code>enableFeaturePersistence</code>	Boolean	Indicates whether you want to persist the features ( <code>true</code> ) or not ( <code>false</code> ).	Optional  <b>Note:</b> This field is required only if raw data or when features are extracted.	55.0
<code>enableInsightPersistence</code>	Boolean	Indicates whether you want to persist the insights ( <code>true</code> ) or not ( <code>false</code> ).  <b>Note:</b> The <code>enableScorePersistence</code>	Optional	55.0

Name	Type	Description	Required or Optional	Available Version
		field must be enabled to persist insights.		
<code>enableScorePersistence</code>	Boolean	Indicates whether you want to persist the prediction scores ( <code>true</code> ) or not ( <code>false</code> ).	Optional	55.0
<code>enableSuggestionPersistence</code>	Boolean	Indicates whether you want to persist the suggestions ( <code>true</code> ) or not ( <code>false</code> ).	Optional	55.0
		 <b>Note:</b> The <code>enableScorePersistence</code> field must be enabled to persist suggestions.		
<code>enrichModelClassification</code>	Boolean	Indicates whether you want to retrieve the classification model type and the classification threshold ( <code>true</code> ) or not ( <code>false</code> ).	Optional	55.0
<code>enrichModelFeatures</code>	Boolean	Indicates whether you want to retrieve the model feature details, including label and data type ( <code>true</code> ) or not ( <code>false</code> ).	Optional	55.0
<code>enrichPredictionDefinition</code>	Boolean	Indicates whether you want to retrieve the prediction definition label ( <code>true</code> ) or not ( <code>false</code> ).	Optional	55.0
<code>featureColumnMap</code>	Map<String, String>	Represents the map that contains which features must be persisted and where they must be persisted. The key-value pair must contain: <ul style="list-style-type: none"> <li><code>key</code>—Feature name</li> <li><code>value</code>—ResponseObjects (configured in the Admin UI setup).FieldName</li> </ul>	Optional	55.0
<code>featureExtractorName</code>	String	The API name of the feature extractor record.	Optional	55.0
		 <b>Note:</b> This field is required when the <code>usecaseModel</code> doesn't have a default Feature Extractor and the input		

Name	Type	Description	Required or Optional	Available Version
<del>featureExtractionParameters</del>	<del>Feature Extraction Parameters Field Map Value[]</del>	<del>Represents the input parameters that are required by the Feature Extractor to extract the features that a model requires to make the prediction. Supports a maximum of 200 records.</del>	<del>Optional</del>	<del>55.0</del>
featureExtractionParameters	Feature Extraction Parameters Field Map Value[]	Represents the input parameters that are required by the Feature Extractor to extract the features that a model requires to make the prediction. Supports a maximum of 200 records.	Optional  <b>Note:</b> This field is required when the input type is <del>ExtractedData</del> or <del>RecordOverrides</del>	55.0
featureExtractorId	String	The ID of the feature extractor record from the <a href="#">AIFeatureExtractor</a> on page 4 object. The specified feature extractor is used to extract the features for the prediction.  For information on the custom feature extractor interface implementation, see <a href="#">CustomFeatureExtractor Interface</a> .	Optional	55.0
historyReferencePoint	String	Represents a reference point for a comparison between current and previous prediction scores.	Optional	55.0
inputType	String	The type of input used to make the prediction. Supports a maximum of 200 records.  Possible values are: <ul style="list-style-type: none"> <li>• <b>Records</b>—All the features for a model are present in the Salesforce database.</li> <li>• <b>RawData</b>—All the features for a model are provided in the API request itself.</li> <li>• <b>RecordOverrides</b>—The API reads a part of the features for the model from the Salesforce database by using the specified record Id. The remaining features are provided in the API request as raw data.</li> </ul>	Required	55.0

Name	Type	Description	Required or Optional	Available Version
		<ul style="list-style-type: none"> <li><b>ExtractedRawData</b>—The API computes some or all the features for the model at runtime using the configured Feature Extractor, others can be passed as raw data in the API request.</li> <li><b>ExtractedRecordOverrides</b>—The API computes some features for the model at run time by using the configured Feature Extractor. For the remaining features, the API refers to the Salesforce database through the specified record ID.</li> </ul>		
<code>insightColumnMap</code>	<code>Map&lt;String, String&gt;</code>	<p>Represents the map that contains which insight's Name/Value must be persisted, and to which object they must be persisted. The key-value pair must contain:</p> <ul style="list-style-type: none"> <li><b>key</b>—INSIGHT1.Name / INSIGHT1.Value (up to maximum of 3 insights Name/Value)</li> <li><b>value</b>—ResponseObjects (configured in the Admin UI setup).FieldName</li> </ul>	Optional	55.0
<code>insightsSettings</code>	<code>Map&lt;String, Integer&gt;</code>	<p>A map for configuring insight settings. Here are the settings that contribute to the prediction score:</p> <ul style="list-style-type: none"> <li><b>maxInsights</b>—Maximum number of insights that you want the machine learning model to generate.</li> <li><b>maxSuggestionCount</b>—Maximum number of suggestions that you want the machine learning model to generate.</li> <li><b>suggestionImpactMinimumPct</b>—Minimum eligible percentage for improving the prediction score based on suggestions.</li> </ul> <p>For more information, see <a href="#">Define Maximum Suggestions and Insights</a> in the AI Accelerator Admin Guide.</p>	Optional	55.0
<code>predictionDefinition</code>	<code>String</code>	The developer name or API name from the DiscoveryGoal object.	Required	55.0

Name	Type	Description	Required or Optional	Available Version
rawData	<a href="#">Raw Data Input Wrap[]</a>	A two-dimensional array of row values in which each row is a comma-separated list of values for features provided in columnNames. Supports a maximum of 200 records.	Optional  <b>Note:</b> This field is required when the input type is RawData or RecordSeries	55.0
records	String[]	The IDs of the Salesforce record that is used as input features for model to make the prediction.	Optional  <b>Note:</b> This field is required when the input type is Records, RecordSeries, or BatchRecords	55.0
<del>scorePersistenceColumn</del>	String	The name and value of the score that must be persisted, and to which object it must be persisted. The valid format is ResponseObject.FieldName.	Optional.  <b>Note:</b> This field is required when <del>enableScorePersistence</del> is set to true. If <del>enableScorePersistence</del> is true and the value isn't specified, the score column map from the setup page is used by default.	55.0
suggestionColumnMap	Map<String, String>	Represents the map that contains which suggestions Name/Value must be persisted, and to which object they must	Optional	55.0

Name	Type	Description	Required or Optional	Available Version
		<p>be persisted. The key-value pair must contain:</p> <ul style="list-style-type: none"> <li>key—SUGGESTION1.Name / SUGGESTION1.Value (maximum of 5 suggestions Name/Value)</li> <li>value—ResponseObjects (configured in the Admin UI setup).FieldName</li> </ul>		
usecaseDefinition	String	The ID of the usecase definition record from the <a href="#">AIUcaseDefinition</a> on page 8 object.	Optional	55.0
usecaseDevname	String	The API name of the usecase definition record.	Required	55.0

### JSON example

An example of `inputType` as `Records`.

```
{
  "usecaseDevname": "AIUcaseDefinitionIdentifier",
  "predictionDefinition": "PredictionDefinitionIdentifier",
  "inputType": "Records",
  "records": {
    "wrappedList": [
      "a00x0000000CHa0AAG"
    ]
  },
  "insightsSettings": {
    "insightsSettings": {
      "maxSuggestionCount": 1,
      "maxInsights": 1,
      "suggestionImpactMinimumPct": 0
    }
  },
  "insightColumnMap": {
    "columnMap": {
      "INSIGHT1.Name": "Demo__c.InsightName1Override__c",
      "INSIGHT1.Value": "Demo__c.InsightValue1__c",
      "INSIGHT1.Impact": "Demo__c.InsightImpact1__c"
    }
  },
  "suggestionColumnMap": {
    "columnMap": {
      "SUGGESTION1.Name": "Demo__c.RecommendationName1__c",
      "SUGGESTION1.Value": "Demo__c.RecommendationValue1__c",
      "SUGGESTION1.Impact": "Demo__c.RecommendationImpact1Override__c"
    }
  }
},
```

```

.. "scorePersistenceColumn": "Demo__c.Score__c",
.. "enableInsightPersistence": true,
   "enableScorePersistence": true,
.. "enableSuggestionPersistence": true,
   "async": false
}

```

An example of inputType as RawData.

```

{
  "usecaseDevname": "AIUsecaseDefinitionIdentifier",
  "predictionDefinition": "PredictionDefinitionIdentifier",
  "inputType": "RawData",
  "columnNames": {
    "wrappedList": [
      "corp_year_week__c",
      "sap_source_id__c",
      "sap_ppg_id__c",
      "sales_units__c"
    ]
  },
  "rawData": {
    "rawData": [
      {
        "rawDataInputWrap": {
          "rawDataInput": [
            "202016",
            "0YQx0000000CaS8GAK",
            "01tx00000006j2DAAQ",
            "20"
          ]
        }
      },
      {
        "rawDataInputWrap": {
          "rawDataInput": [
            "202016",
            "0YQx0000000CaS8GAK",
            "01tx00000006j2DAAQ",
            "20000"
          ]
        }
      }
    ]
  },
  "featureColumnMap": {
    "columnMap": {
      "corp_year_week__c": "Demo__c.YearWeekFeature__c",
      "sap_source_id__c": "Demo__c.StoreIdFeature__c",
      "sap_ppg_id__c": "Demo__c.ProductIdFeature__c",
      "sales_units__c": "Demo__c.SalesUnitsFeatureOverride__c"
    }
  },
  "enableFeaturePersistence": true
}

```

An example of inputType as RecordOverrides.

```
{
  "usecaseDevname": "AIUsecaseDefinitionIdentifier",
  "predictionDefinition": "PredictionDefinitionIdentifier",
  "inputType": "RecordOverrides",
  "records": {
    "wrappedList": [
      "a00x00000000CHa0AAG"
    ]
  },
  "columnNames": {
    "wrappedList": [
      "corp_year_week__c",
      "sap_source_id__c",
      "sap_ppg_id__c",
      "sales_units__c"
    ]
  },
  "rawData": {
    "rawData": [
      {
        "rawDataInputWrap": {
          "rawDataInput": [
            "202016",
            "0YQx00000000CaS8GAK",
            "01tx000000006j2DAAQ",
            "20"
          ]
        }
      },
      {
        "rawDataInputWrap": {
          "rawDataInput": [
            "202016",
            "0YQx00000000CaS8GAK",
            "01tx000000006j2DAAQ",
            "20000"
          ]
        }
      }
    ]
  }
}
```

An example of inputType as ExtractedRawData.

```
{
  "usecaseDevname": "AIUsecaseDefinitionIdentifier",
  "predictionDefinition": "PredictionDefinitionIdentifier",
  "inputType": "ExtractedRawData",
  "featureExtractorDevName": "featureExtractorIdentifier",
  "featureExtractionParameters": {
    "featureExtractionParameters": [
      {

```

```
      "featureExtractionParametersMapValue": {
        "recordId": "01tx00000006j2DAAQ1",
        "rawData": {
          "corp_year_week__c": "202016"
        }
      }
    ]
  },
  "enableFeaturePersistence": true
}
```

An example of `inputType` as `ExtractedRecordOverrides`.

```
{
  "usecaseDevname": "AIUsecaseDefinitionIdentifier",
  "predictionDefinition": "PredictionDefinitionIdentifier",
  "inputType": "ExtractedRecordOverrides",
  "records": {
    "wrappedList": [
      "a00x0000000CHa0AAG"
    ]
  },
  .."featureExtractorDevName": "featureExtractorIdentifier",
  "featureExtractionParameters": {
    "featureExtractionParameters": [
      {
        "featureExtractionParametersMapValue": {
          "recordId": "01tx00000006j2DAAQ1"
        }
      }
    ]
  }
}
```

Feature Extraction Parameters Map Value Input

Input representation of the feature extraction parameters map.

Properties

Name	Type	Description	Required or Optional	Available Version
featureExtractionParametersMapValue	Object	The list of feature extraction parameters that are required to make the score prediction.	Required	55.0

Raw Data Input Wrap Input

Input representation of the list of raw data input.

**Properties**

Name	Type	Description	Required or Optional	Available Version
rawDataInputWrap	String[]	The values of the model input feature provided as raw data in the request.	Optional	55.0

## Recommendation Input

Input representation of the recommendation request with Einstein Next Best Action.

**JSON example**

```
{
  "usecaseDefinitionName": "ChurnPredictionRealTime",
  "strategyName": "flow_sample",
  "rcmdStrategyParameters": [
    {
      "recordId": "a02xx000001nd0RAAQ",
      "predictionScore": 96
    }
  ],
  "maxRecommendationsCount": 1,
  "recommendationFieldMapping": {}
}
```

**Properties**

Name	Type	Description	Required or Optional	Available Version
canPersist Recommendations	Boolean	Indicates whether the recommendations are persisted ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> .	Optional	56.0
isAsync	Boolean	Indicates whether the execution mode is <code>async</code> ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> .	Optional	56.0
max Recommendations Count	Integer	The maximum recommendations to request. You can specify a maximum of four recommendations.	Optional	56.0
rcmdRecordId Persistence Column	String	The name of the column from the <code>PrimaryResponse</code> object that persists the recommendation record ID when the <code>canPersistRecommendations</code> property is set to <code>true</code> .	Optional	56.0
rcmdStrategy Parameters	Map<String,Object>[]	The list of parameters to pass to the flow action for the specified strategy to generate recommendations.	Required	56.0

Name	Type	Description	Required or Optional	Available Version
recommendation FieldMapping	Map<String, String>	The field mapping that's used to store the recommendations when the <code>canPersistRecommendations</code> property is set to <code>true</code> .	Optional	56.0
strategyName	String	The name of the strategy.	Required	56.0
usecase Definition Name	String	The API name of the use case definition.	Required	56.0

## Response Bodies

Here's a list of AI Accelerator API response bodies.

### [Prediction Output](#)

Output representation of the prediction request.

### [Model Feature](#)

Output representation of the feature model that is used for making predictions.

### [Prediction Object](#)

Output representation of the list of predictions.

### [Prediction Details](#)

Output representation of the prediction details.

### [Suggestion](#)

Output representation of the score improvement suggestions.

### [Insight](#)

Output representation of insights.

### [Column](#)

Output representation of model features. This is used to show insights about the score and score improvement suggestion.

### [Recommendation](#)

Output representation of the recommendation request with Einstein Next Best Action.

### [Recommendation Details](#)

Specifies the recommendation details returned by the recommendation request.

### [Recommendation Strategy Result](#)

Specifies the strategy result containing the fetched recommendation details for each record.

### [Recommendation Action Parameters](#)


Specifies the details of the parameters that are passed to the flow action based on the user's acceptance or rejection of the recommendation.

### [Recommendation Request Error](#)

Specifies the details of the error when the recommendation request fails.

## Prediction Output

Output representation of the prediction request.

Property Name	Type	Description	Filter Group and Version	Available Version
batchDatasource	String	<p>The batch data source name where batch-computed features are stored.</p> <p> <b>Note:</b> The batch data source name is null when the feature input used to generate predictions is real-time.</p>	Small, 57.0	57.0
classificationThreshold	Double	The classification threshold value to derive the type of model to be used for prediction. If prediction score is higher/lower than this threshold, positive/negative prediction labels are displayed based on scorecard configuration.	Small, 55.0	55.0
classificationType	String	Specifies the classification model type. For example. Binary or ternary.	Small, 55.0	55.0
executionModeName	String	Indicates the change in execution mode from user specified to default mode configuration.	Small, 54.0	54.0
featureExtractor	String	The class name of the feature extractor implementation used for the prediction.	Small, 54.0	54.0
featureExtractorIdentifier	String	The API name of the feature extractor record.	Small, 57.0	57.0
featureExtractorType	String	<p>The feature extractor type used for the prediction.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• Apex</li> <li>• Hybrid</li> <li>• Java</li> </ul>	Small, 54.0	54.0
featureInputType	String	<p>The type of feature input used in generating predictions.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• Realtime_Input</li> <li>• Sample_Input</li> <li>• Batch_Input</li> </ul>	Small, 57.0	57.0
inputType	String	The type of input used to make the prediction.	Small, 55.0	55.0

Property Name	Type	Description	Filter Group and Version	Available Version
insightsSettings	Map<String, Integer>	A map for configuring insight settings.	Small, 55.0	55.0
modelFeatures	<a href="#">Model Feature</a> []	Specifies additional details of the model feature, including name, label, and data type.	Small, 55.0	55.0
outcomeGoal	String	Indicates whether predDef maximizes or minimizes the field value.	Small, 55.0	55.0
predictionDefinition	String	The model developer name or API name used to make prediction.	Small, 55.0	55.0
predictionDefinitionLabel	String	The label corresponding to the model ID used for prediction.	Small, 55.0	55.0
predictionPersistedErrorMessage	String	Indicates that an error occurred during persistence of prediction results or features.	Small, 54.0	54.0
predictionPlatform	String	The machine learning platform that is used to make the prediction for a use case.	Small, 55.0	55.0
predictions	<a href="#">Prediction Object</a> []	A list of prediction results.	Small, 55.0	55.0
primaryResponseRecordIds	String[]	Indicates the list of recordIds where the response is persisted in primary response object.	Small, 55.0	55.0
requestId	String	The unique identifier for the request to be generated and used for listening to notifications in the async mode of the execution.	Small, 55.0	55.0
secondaryResponseRecordIds	String[]	Indicates the list of recordIds where the response is persisted in secondary response object.	Small, 55.0	55.0
status	Status	Indicates whether the call succeeded or failed, and in case of failure, specifies the reason.	Small, 55.0	55.0

### JSON example

```
{
  "Prediction Purpose": "Use case Name Eg: Smart Selling Visit Recommendation",
  "Prediction Platform": "Einstein Discovery / Einstein Platform (optional)",
  "Prediction Definition": "PredictionDefinitionIdentifier",
  "batchDatasource": "ApexSSVisitRecommendationsDataSource",
  "Input Type": "ExtractedRecordOverrides",
  "featureInputType": "Sample_Input",
  "Feature Extractor Type": "Hybrid",
```

```

"featureExtractorIdentifier": "ApexSSVisitRecommendationsExtractor",
"Feature Extractor": "SSVisitRecommendationsFeatureExtractorClass",
"Primary Response Obj RecordIds": [
  "a00x00000000CHa0AAG",
  "a00x00000000CHa0XXY"
],
"Secondary Response Obj RecordIds": [
  "a00x00000000CHa0PPS",
  "a00x00000000CHa0QQW"
],
"predictions": [
  {
    "model": {
      "id": "10tRM000000002b0AA"
    },
    "prediction": {
      "score": 799315.4282959097,
      "insights": [
        {
          "columns": [
            {
              "columnName": "Has Line Item",
              "columnValue": "true"
            }
          ],
          "value": 553763.66105859
        }
      ]
    },
    "status": "Success"
  },
  {
    "model": {
      "id": "10tRM000000002b0AA"
    },
    "prediction": {
      "score": 799315.4282959097,
      "insights": [
        {
          "columns": [
            {
              "columnName": "Has Line Item",
              "columnValue": "true"
            }
          ],
          "value": 543763.66105859
        }
      ]
    },
    "status": "Success"
  }
],
"insightSettings": {
  "maxPrescriptions": 0,

```

```

    "maxInsights": 0
  }
}

```

### Model Feature

Output representation of the feature model that is used for making predictions.

Property Name	Type	Description	Filter Group and Version	Available Version
label	String	The label of the feature model that is used for the scores prediction.	Small, 55.0	55.0
name	String	The name of the feature model that is used for the scores prediction.	Small, 55.0	55.0
type	String	The type of the feature model that is used for the scores prediction.	Small, 55.0	55.0

### Prediction Object

Output representation of the list of predictions.

Property Name	Type	Description	Filter Group and Version	Available Version
model	Map<String,String>	The model information of a success prediction.	Small, 53.0	53.0
prediction	<a href="#">Prediction</a>	The prediction details.	Small, 53.0	53.0
status	String	The status of the prediction request.	Small, 53.0	53.0
suggestions	<a href="#">Suggestion</a> []	The details on suggestions on how to improve the prediction.	Small, 54.0	54.0

### Prediction Details

Output representation of the prediction details.

Property Name	Type	Description	Filter Group and Version	Available Version
historyRefPointScore	Double	Represents a reference point for a comparison between current and previous prediction scores.	Small, 55.0	55.0
insights	<a href="#">Insight</a> []	Represents insights for the prediction scores.	Small, 55.0	55.0
missingColumns	String[]	A list of missing columns for the predict result.	Small, 55.0	55.0

Property Name	Type	Description	Filter Group and Version	Available Version
outOfBoundsColumns	Column[]	A list of out of bounds columns for the predict result.	Small, 55.0	55.0
score	Double	The score predicted by the use case model.	Small, 55.0	55.0

### Suggestion

Output representation of the score improvement suggestions.

Property Name	Type	Description	Filter Group and Version	Available Version
columns	Column[]	The name and value of model features based on which the scores prediction is derived.	Small, 55.0	55.0
value	Double	The value of the score improvement suggestion.	Small, 55.0	55.0

### Insight

Output representation of insights.

Property Name	Type	Description	Filter Group and Version	Available Version
columns	Column[]	The name and value of model features based on which the scores prediction is derived.	Small, 55.0	55.0
value	Double	The insight value that contributed to the score prediction.	Small, 55.0	55.0

### Column

Output representation of model features. This is used to show insights about the score and score improvement suggestion.

Property Name	Type	Description	Filter Group and Version	Available Version
columnLabel	String	The label of the column.	Small, 55.0	55.0
columnName	String	The name of the column.	Small, 55.0	55.0
columnValue	String	The value in the column.	Small, 55.0	55.0
initialValue	String	The column's initial value before being updated with the new value.	Small, 55.0	55.0

## Recommendation

Output representation of the recommendation request with Einstein Next Best Action.

## JSON example

```
{
  "recommendationRecordIds" : [ "0prRM00000001abYAA" ],
  "recommendationStrategyResult" : [ {
    "errors" : [ ],
    "isSuccess" : true,
    "onBehalfOfId" : "a02xx000001nd0RAAQ",
    "recommendations" : [ {
      "acceptanceLabel" : "yes",
      "actionReferenceId" : "301RM0000004tIcYAI",
      "actionReferenceLabel" : "sendingEmailFlow",
      "actionReferenceName" : "sendingEmailFlow",
      "actionStrategyParameters" : [ {
        "name" : "inputRecommendation",
        "type" : "SObject",
        "value" : {
          "attributes" : {
            "type" : "Recommendation",
            "url" : "/services/data/v56.0/subjects/Recommendation/0prRM00000001abYAA"
          },
          "AcceptanceLabel" : "yes",
          "ActionReference" : "sendingEmailFlow",
          "CreatedById" : "005RM000002WU1IYAW",
          "CreatedDate" : "2022-07-14T20:06:32.000Z",
          "Description" : "Recommendation description",
          "ExternalId" : null,
          "Id" : "0prRM00000001abYAA",
          "ImageId" : null,
          "IsActionActive" : true,
          "IsDeleted" : false,
          "LastModifiedById" : "005RM000002WU1IYAW",
          "LastModifiedDate" : "2022-07-14T20:06:32.000Z",
          "LastReferencedDate" : "2022-07-14T20:06:32.000Z",
          "LastViewedDate" : "2022-07-14T20:06:32.000Z",
          "Name" : "Rcmd2",
          "RecommendationKey" : null,
          "RejectionLabel" : "no",
          "SystemModstamp" : "2022-07-14T20:06:32.000Z"
        }
      }
    ], {
      "name" : "recordId",
      "type" : "String",
      "value" : "a02xx000001nd0RAAQ"
    }, {
      "name" : "contextRecordId",
      "type" : "String",
      "value" : "a02xx000001nd0RAAQ"
    }
  ],
  "description" : "Recommendation description",
  "id" : "0prRM00000001abYAA",
  "name" : "Recommendation",

```

```

    "rejectionLabel" : "no"
  } ],
  "recordId" : "a02xx000001nd0RAAQ"
} ],
"status" : {
  "code" : 200,
  "message" : "The request to get recommendations was submitted."
},
"strategyName" : "flow_sample",
"usecaseName" : "ChurnPredictionRealTime"
}

```

### Properties

Property Name	Type	Description	Filter Group and Version	Available Version
executionMode Warning	String	The warning when the execution mode isn't suitable.	Small, 56.0	56.0
recommendation Persistence ErrorMessage	String	The error message when persisting the recommendations fails.	Small, 56.0	56.0
recommendation RecordIds	String[]	The list of IDs of the recommendation records that are part of the recommendation result.	Small, 56.0	56.0
recommendation StrategyResult	<a href="#">Recommendation Strategy Result</a>	The list of recommendations for each record in the request. Displays a maximum of four recommendations as specified in the <code>maxRecommendationsCount</code> property in the request.	Small, 56.0	56.0
requestId	String	The ID of the recommendation request that's used in the async mode of execution to listen to the platform event.	Small, 56.0	56.0
status	String	The status of the recommendation request.	Small, 56.0	56.0
strategyName	String	The name of the strategy.	Small, 56.0	56.0
usecaseName	String	The <code>usecaseName</code> property value on the <code>AIUsecaseDefinition</code> object.	Small, 56.0	56.0

### Recommendation Details

Specifies the recommendation details returned by the recommendation request.

Property Name	Type	Description	Filter Group and Version	Available Version
acceptanceLabel	String	The text indicating user acceptance of the recommendation.	Small, 56.0	56.0

Property Name	Type	Description	Filter Group and Version	Available Version
actionReferenceId	String	The ID of the action to perform, for example, launching a flow.	Small, 56.0	56.0
actionReferenceLabel	String	The label of the action to perform, for example, launching a flow.	Small, 56.0	56.0
actionReferenceName	String	The name of the action to perform, for example, launching a flow.	Small, 56.0	56.0
actionStrategyParameters	<a href="#">Recommendation Action Parameters</a>	The list of parameters to pass to the flow action based on the user's acceptance or rejection of the recommendation.	Small, 56.0	56.0
actionType	String	The type of action.	Small, 56.0	56.0
description	String	The description of the recommendation.	Small, 56.0	56.0
id	String	The ID of the recommendation.	Small, 56.0	56.0
imageUrl	String	The URL of the recommendation image to display.	Small, 56.0	56.0
name	String	The name of the recommendation.	Small, 56.0	56.0
rejectionLabel	String	The text indicating user rejection of the recommendation.	Small, 56.0	56.0

### Recommendation Strategy Result

Specifies the strategy result containing the fetched recommendation details for each record.

Property Name	Type	Description	Filter Group and Version	Available Version
errors	<a href="#">Recommendation Request Error</a>	Specifies the runtime errors that occur during the recommendation request execution.	Small, 56.0	56.0
isSuccess	Boolean	Indicates whether the recommendation request was successful ( <code>true</code> ) or not ( <code>false</code> ).	Small, 56.0	56.0
onBehalfOfId	String	The ID of the user or object for which the recommendation request is executed.	Small, 56.0	56.0
predictionScore	Double	The prediction score, which is an input to the recommendation request.	Small, 56.0	56.0
recommendations	<a href="#">Recommendation Details</a>	The list of recommendations returned by a recommendation request.	Small, 56.0	56.0

Property Name	Type	Description	Filter Group and Version	Available Version
recordId	String	The ID of the record for which the recommendation request is executed.	Small, 56.0	56.0

#### Recommendation Action Parameters

Specifies the details of the parameters that are passed to the flow action based on the user's acceptance or rejection of the recommendation.

Property Name	Type	Description	Filter Group and Version	Available Version
name	String	The name of the parameter.	Small, 56.0	56.0
type	String	The type of the parameter.	Small, 56.0	56.0
value	Object	The value of the parameter.	Small, 56.0	56.0

#### Recommendation Request Error

Specifies the details of the error when the recommendation request fails.

Property Name	Type	Description	Filter Group and Version	Available Version
message	String	The message that's displayed for the error.	Small, 56.0	56.0
statusCode	String	The status code that indicates the error.	Small, 56.0	56.0

## AI Accelerator Predictions API Using Apex

This AI Accelerator Predictions API is also exposed to Apex. You can access/invoke this API from within your Apex class to get realtime prediction results.

Here are the details to invoke/access the AI Accelerator Predictions API from an Apex class:

1. In the Developer Console, select **File | New Apex Class**.
2. Implement the AI Accelerator Connect API request in the Apex class.

This example shows an implementation of the connect API request from an Apex class.

```
ConnectApi.PredictionRequest predictionInputRepresentation = new
ConnectApi.PredictionRequest();
predictionInputRepresentation.async = false;
predictionInputRepresentation.enableScorePersistence = false;
predictionInputRepresentation.enableInsightPersistence = false;
predictionInputRepresentation.enableFeaturePersistence = false;
predictionInputRepresentation.enableSuggestionPersistence = false;
predictionInputRepresentation.usecaseDefinition = '0sIx00000000006EAA';
predictionInputRepresentation.predictionDefinition = '0sIx00000000006EAB';
```

```

predictionInputRepresentation.inputType = 'ExtractedRawData';
predictionInputRepresentation.featureExtractorId = '0sIx00000000006EAC';
Map < String, Integer > insightsSettings = new Map < String, Integer > ();
insightsSettings.put('maxInsights', 0);
insightsSettings.put('suggestionImpactMinimumPct', 0);
predictionInputRepresentation.insightsSettings = insightsSettings;
List < String > recordIds = new List < String > ();
recordIds.add('subscriptionId');
predictionInputRepresentation.records = recordIds;

//Create a Map with feature extraction parameters
//Replace 'key1', 'recordId' with the required params in your feature extractor
Map < String, Object > map1 = new Map < String, Object > ();
map1.put('recordId', '0sIx000000000068EAC');
map1.put('key1', 'value1');
Object objForList = map1;
ConnectApi.FeatureExtractionParametersFieldMapValue features = new
ConnectApi.FeatureExtractionParametersFieldMapValue();
features.featureExtractionParametersMapValue = objForList;
List < ConnectApi.FeatureExtractionParametersFieldMapValue > featuresList = new List <
ConnectApi.FeatureExtractionParametersFieldMapValue > ();
featuresList.add(features);
predictionInputRepresentation.featureExtractionParameters = featuresList;
//Act
ConnectApi.PredictionResponse predictionOutputRepresentation =
ConnectApi.AiAcceleratorConnectFamily.predictions(predictionInputRepresentation);

```

## 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*.

### [aiaccelerator Namespace](#)

The `AiAccelerator` namespace provides an interface for overriding the default feature extractor.

## aiaccelerator Namespace

The `AiAccelerator` namespace provides an interface for overriding the default feature extractor.

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

### [CustomFeatureExtractor Interface](#)

Use the custom apex-based feature extractor interface to override or extend the default feature extractor implementation.

## CustomFeatureExtractor Interface

Use the custom apex-based feature extractor interface to override or extend the default feature extractor implementation.

### EDITIONS

Available in: Lightning Experience

Available when admin settings for AI Accelerator and for the product related to the use case are enabled. The Salesforce org must have the CRM Plus license and the product's CRM license.

## Namespace

[AiAccelerator](#)

## Usage

Custom feature extractor interface takes feature extraction parameters as inputs, performs the required business logic according to the use-case, and then returns the extracted features as a <key,value> map. Here the expected keys of the map are:

- `columnNames:List<String>`—It is input feature names required by the model.
- `rawData:List<List<String>>`—A two-dimensional array that contains the value for each feature in the same order and a two-dimensional array for bulk feature retrieval for multiple records.

Consider an ML use case that predicts the price of a real estate property. To do so, the ML model can require features, such as the property's square feet area, location, number of bedrooms, construction year, and construction age. Assume that all of these features are available in the property record except the construction age feature. In this case, the AI Accelerator API invokes a feature extractor to calculate the construction age in runtime by subtracting the construction year feature from the current year. Complex logic, such as taking joins across different entities and calculating the sum or average of some data over a period, can be used in feature extraction.

The behavior of the custom feature extractor interface implementation is dependent on the value of the `FeatureExtractorType` property set in your use case configuration file.

- `Apex`—Default feature extractor implementation is overridden by the custom feature extractor implementation.
- `Hybrid`—Default feature extractor implementation is used and can be extended by the custom feature extractor implementation.
- `Java`—Default feature extractor implementation is overridden by the custom feature extractor implementation.

Keep these considerations in mind when implementing the interface for a custom feature extractor.

- Every implementation receives parameters as a [recordList of Map](#) and a [Map](#) of the previously extracted features.
- An implementation receives parameters as a Map of the previous extracted features when multiple Apex classes are involved in feature extraction or when the intermediate extracted features must be passed on across the classes.
- Add validations for input parameters in the implementation for your use case. Make sure that the validations check for the presence of essential keys or columns required for the implementation.
- Every implementation must merge newly extracted features with previously extracted features, and return the merged output. The previously extracted features can be null.
- If a use case requires the execution of multiple implementations in sequence or parallel, provide a wrapper to invoke the required feature extractors. Mention the wrapper class name in the configuration file.
- For some use cases, few features have to be extracted and others have to be provided as raw data in the input request. For such use cases, implementation must provide the final output by merging extracted features and values from the raw data.
- For Java and Hybrid feature extractors, all the Java implementation classes must expose a default constructor without requiring any parameters to be passed.
- AI Accelerator platform validates the output map of feature extraction implementations to ensure that it contains a non-empty list of raw data and column names.
  - Raw data is a [List of Lists](#) where each inner list represents the values of features for a record. The outer list supports bulk extraction.
  - Column names store the list of feature names.

[CustomFeatureExtractor Methods](#)

[CustomFeatureExtractor Example Implementation](#)

## CustomFeatureExtractor Methods

The following are methods for CustomFeatureExtractor.

`extractFeatures(var1, var2)`

Returns the extracted features for a model at run time to make a prediction. The extracted features are returned as a key value pair map.

**`extractFeatures(var1, var2)`**

Returns the extracted features for a model at run time to make a prediction. The extracted features are returned as a key value pair map.

Signature

```
public Map<String, Object> extractFeatures(List<Map<String, Object>> var1,
Map<String, Object> var2)
```

Parameters

`var1`

Type: List<Map<String, Object>>

Represents the input parameters for deriving the feature extraction. For example, recordId that is required for a DB query, as per the implementation logic of the feature extractor.

`var2`

Type: Map<String, Object>

Represents the map of a previous extracted feature when multiple classes are involved in feature extraction. This is applicable when your custom feature extractor implementation is extending the default feature extractor implementation in case of Hybrid FeatureExtractorType setting in the use case configuration file.

Return Value

Type: Map<String, Object>

## CustomFeatureExtractor Example Implementation

This is an example implementation of the `aiaccelerator.CustomFeatureExtractor` interface.

- The feature extraction implementation is just a test implementation. It actually doesn't do any DB queries and just expects everything to be present in the `rawData` map to be returned in the final output.
- The feature extraction parameters contain the `rawData` key. This can be used to pass the values of a few features directly, if applicable.
- In actual, the keys like `storeId` and `productId` can be used as parameters in a DB query for feature derivation. The `rawData` keys and values can be merged with the extracted features.

```
global virtual class SampleCustomFeatureExtractor implements CustomFeatureExtractor {

    private static final String RAW_DATA = 'rawData';
    private static final String COL_NAMES = 'columnNames';

    /**
     * A Sample implementation that extracts "rawData" key from the map
     * and prepares response of columnNames list and rawData list of list.
     * @request:
     *     [{
```

```

*         "storeId":"st1",
*         "productId":"p1",
*         "rawData":{
*             "storeCategory":"PREMIUM"
*             "day": MONDAY
*         }
*     }]
* @return
* {
*     "rawData":[[PREMIUM, MONDAY]]
*     "columnNames": ["storeCategory", "day"]
* }
* */
global virtual Map<String, Object> extractFeatures(List<Map<String, Object>> request,
Map<String, Object> extractedFeatures) {
    if (request == null || request.size() == 0) {
        return extractedFeatures;
    }
    Set<String> cols = new Set<String>();
    List<List<String>> rawDataList = new List<List<String>>>();

    //iterating list
    for (Map<String, Object> record: request) {

        //iterating outer map
        for (String key: record.keySet()) {
            List<String> row = new List<String>();

            //extract rawData and add to output features
            if ('rawData' == key) {
                Object value = record.get(key);
                if (value instanceof Map<String, Object>) {
                    Map<String, Object> raw = (Map<String, Object>) value;
                    for (String keyRawData: raw.keySet()) {
                        cols.add(keyRawData);
                        row.add((String) raw.get(keyRawData));
                    }
                }
                rawDataList.add(row);
            }
        }

    }

    return mergeFeatures(extractedFeatures, new List<String>(cols), rawDataList);
}

private Map<String, Object> mergeFeatures(Map<String, Object> extractedFeatures,
List<String> columnNames, List<List<String>> rawDataList) {
    Map<String, Object> features = new Map<String, Object>();
    if (extractedFeatures == null || extractedFeatures.isEmpty() ||
extractedFeatures.get(COL_NAMES) == null
        || extractedFeatures.get(RAW_DATA) == null) {
        features.put(COL_NAMES, columnNames);
    }
}

```

```

        features.put(RAW_DATA, rawDataList);
        return features;
    }
    if (columnNames.isEmpty()) {
        return extractedFeatures;
    }
    List<String> oldCols = (List<String>) extractedFeatures.get(COL_NAMES);
    List<List<String>> oldRows = (List<List<String>>) extractedFeatures.get(RAW_DATA);

    List<String> extractedCols = new List<String>();
    List<List<String>> extractedRows = new List<List<String>>();
    extractedCols.addAll(oldCols);
    extractedCols.addAll(columnNames);

    for (Integer i = 0; i < rawDataList.size(); i++) {
        List<String> mergedRow = new List<String>();
        mergedRow.addAll(oldRows.get(i));
        mergedRow.addAll(rawDataList.get(i));
        extractedRows.add(mergedRow);
    }
    features.put(COL_NAMES, extractedCols);
    features.put(RAW_DATA, extractedRows);
    return features;
}
}

```

## AI Accelerator Metadata Types

Use the AI Accelerator metadata types to set up your machine learning use case. Define machine learning models, feature extractors, and the objects and fields for saving the prediction results for your use case.

### [AIUsecaseDefinition](#)

Represents a collection of fields in your Salesforce org used to define a machine learning use case and get real-time predictions.

### AIUsecaseDefinition

Represents a collection of fields in your Salesforce org used to define a machine learning use case and get real-time predictions.



**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.

### EDITIONS

Available in: Lightning Experience

Available when the admin settings for AI Accelerator and for the product related to the use case are enabled. The Salesforce org must have the CRM Plus license and the product's CRM license.

## File Suffix and Directory Location

AIUsecaseDefinition components have the suffix `.aiUsecaseDefinitions` and are stored in the `aiUsecaseDefinitions` folder.

## Version

AIUsecaseDefinition components are available in API version 56.0 and later.

## Special Access Rules

The AIUsecaseDefinition object is available when the admin settings for AI Accelerator and for the product related to the use case are enabled. The Salesforce org must have the CRM Plus license and the product's CRM license.

## Fields

Field Name	Description
<code>aiUsecaseFieldMappings</code>	<p><b>Field Type</b> <a href="#">AIUsecaseFieldMapping[]</a></p> <p><b>Description</b> The field mappings for the use case definition. Each use case definition can have multiple field mappings.</p>
<code>aiUsecaseModels</code>	<p><b>Field Type</b> <a href="#">AIUsecaseModel[]</a></p> <p><b>Description</b> The models for the use case definition. Each use case definition can have multiple use case models.</p>
<code>creatorType</code>	<p><b>Field Type</b> CreatorType (enumeration of type string)</p> <p><b>Description</b> Required.  The type of user who created the use case definition that's used by AI Accelerator. Valid values are:</p> <ul style="list-style-type: none"> <li>INTERNAL_USER</li> <li>SALESFORCE_ADMIN</li> </ul> <p>Available in API version 57.0 and later.</p>
<code>masterLabel</code>	<p><b>Field Type</b> string</p> <p><b>Description</b> Required.</p>

Field Name	Description
	A user-friendly name for the use case definition, which is defined when the use case definition is created.
maximumInsightCount	<b>Field Type</b> int <b>Description</b> The maximum number of insights returned by the scoring response.
maximumRecommendationCount	<b>Field Type</b> int <b>Description</b> The maximum number of recommendations returned by the Next Best Action Strategy.
maximumSuggestionCount	<b>Field Type</b> int <b>Description</b> The maximum number of suggestions returned by the scoring response.
primaryResponseObject	<b>Field Type</b> string <b>Description</b> The primary object in which the scoring response is stored based on the specified field mapping.
recommendationResponseObject	<b>Field Type</b> string <b>Description</b> The recommendation response object associated with the use case definition.
recommendationSource	<b>Field Type</b> RcmdSourceType (enumeration of type string) <b>Description</b> The tool or platform that generates recommendations. Valid values are: <ul style="list-style-type: none"> <li>Next_Best_Action_Flow</li> <li>None</li> </ul> Available in API version 57.0 and later.
secondaryResponseObject	<b>Field Type</b> string <b>Description</b> The object in which the scoring response is stored based on the specified field mapping.

Field Name	Description
shouldSaveFeatures	<p><b>Field Type</b> boolean</p> <p><b>Description</b> Indicates whether to save the features extracted for the scoring request (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
shouldSaveInsights	<p><b>Field Type</b> boolean</p> <p><b>Description</b> Indicates whether to save the prediction insights that are used to generate the score (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
shouldSaveRecommendation	<p><b>Field Type</b> boolean</p> <p><b>Description</b> Indicates whether to save the recommendation (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
shouldSaveRequestResponse	<p><b>Field Type</b> boolean</p> <p><b>Description</b> Indicates whether to save the request response (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
shouldSaveScore	<p><b>Field Type</b> boolean</p> <p><b>Description</b> Indicates whether to save the prediction score (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
shouldSaveSuggestions	<p><b>Field Type</b> boolean</p> <p><b>Description</b> Indicates whether to save the suggestions for improving the prediction score (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
suggestionImpactMinimumPct	<p><b>Field Type</b> int</p>

Field Name	Description
	<b>Description</b> The minimum eligible percentage for improving the existing prediction score based on the suggestions. Suggestions with an impact greater than the specified percentage on the score are displayed on the prediction scorecard.
usecaseName	<b>Field Type</b> string  <b>Description</b> Required. The name of the use case definition.

### AIUsecaseFieldMapping

Represents information about the field mapping to store extracted features, prediction scores, prediction insights, and use case suggestions in the response object.

Field Name	Description
developerName	<b>Field Type</b> string  <b>Description</b> The unique name for the field mapping in the use case definition.  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. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization. Label is <b>Record Type Name</b> .
mappedFieldName	<b>Field Type</b> string  <b>Description</b> Required. The name of the field where the scoring response is stored.
mappedFieldType	<b>Field Type</b> MappedFieldType (enumeration of type string)  <b>Description</b> Required. The type of the mapped field.

Field Name	Description
	<p>Valid values are:</p> <ul style="list-style-type: none"> <li>• FEATURE</li> <li>• PREDICTION_SCORE</li> <li>• INSIGHT</li> <li>• SUGGESTION</li> <li>• SECONDARY_RESPONSE_RECORD_ID</li> <li>• RECOMMENDATION_RESPONSE_RECORD_ID</li> <li>• RECOMMENDATION</li> </ul> <p>The default value is <code>FEATURE</code>.</p>
<code>masterLabel</code>	<p><b>Field Type</b> string</p> <p><b>Description</b> Required. A user-friendly name for the use case field mapping, which is defined when the field mapping is created.</p>
<code>responseFieldName</code>	<p><b>Field Type</b> string</p> <p><b>Description</b> Required. The name of the response object's field that's mapped to the field storing the score.</p>
<code>responseObject</code>	<p><b>Field Type</b> string</p> <p><b>Description</b> Required. The object whose field is mapped to the field storing the score. It's either the <code>PrimaryResponseObject</code> or the <code>SecondaryResponseObject</code> specified in the <code>AIUseCaseDefinition</code> object.</p>
<code>sequenceNumber</code>	<p><b>Field Type</b> int</p> <p><b>Description</b> The sequence number for the information stored in the field mapping.</p>

## AIUseCaseModel

Represents information about the machine learning models that generate predictions for your use case.

Field Name	Description
aiFeatureExtractors	<p><b>Field Type</b> AIFeatureExtractor[]</p> <p><b>Description</b> The AI feature extractors to retrieve the input data.</p>
defaultFeatureExtractor	<p><b>Field Type</b> AIFeatureExtractor</p> <p><b>Description</b> The default AI feature extractor to retrieve the input data.</p>
developerName	<p><b>Field Type</b> string</p> <p><b>Description</b> The unique name for the use case model.  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. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization. Label is <b>Record Type Name</b>.</p>
masterLabel	<p><b>Field Type</b> string</p> <p><b>Description</b> Required.  A user-friendly name for the use case model, which is defined when the use case model is created.</p>
predictionDefinition	<p><b>Field Type</b> string</p> <p><b>Description</b> Required.  The unique identifier of the prediction definition that's related to the use case model. This identifier can be an external ID. If you use Einstein Discovery to create models, the predictionDefinition field stores the developer name of the record.</p>
predictionPlatform	<p><b>Field Type</b> PredictionPlatform (enumeration of type string)</p> <p><b>Description</b> Required.</p>

Field Name	Description
	<p>The platform on which the machine learning model is created and deployed. Valid values are:</p> <ul style="list-style-type: none"> <li>• <code>Einstein_Discovery</code></li> <li>• <code>Default</code>—For internal use only.</li> </ul> <p>The default value is <code>Einstein_Discovery</code>. Available in API version 57.0 and later.</p>

## AIFeatureExtractor

Represents information about the feature extractor that's used to retrieve the input data for the use case model that's used to generate predictions.

Field Name	Description
<code>batchInputSourceIdentifier</code>	<p><b>Field Type</b> string</p> <p><b>Description</b> The identifier of the input source of the features computed by batch jobs, which can be used by a model for generating predictions. Available in API version 57.0 and later.</p>
<code>className</code>	<p><b>Field Type</b> string</p> <p><b>Description</b> Required. The ID of the Apex class created for the feature extractor.</p>
<code>developerName</code>	<p><b>Field Type</b> string</p> <p><b>Description</b> The unique name for the feature extractor. 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. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization. Label is <b>Record Type Name</b>.</p>
<code>extractorType</code>	<p><b>Field Type</b> ExtractorType (enumeration of type string)</p> <p><b>Description</b> Required.</p>

Field Name	Description
	<p>The type of the feature extractor.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> <li>• APEX</li> <li>• JAVA</li> <li>• HYBRID</li> </ul> <p>The default value is APEX.</p>
featureInputType	<p><b>Field Type</b> string</p> <p><b>Description</b> Required.</p> <p>The type of feature input that's used in generating predictions. Valid values are:</p> <ul style="list-style-type: none"> <li>• Realtime_Input</li> <li>• Sample_Input</li> <li>• Batch_Input</li> <li>• Batch_And_Realtime_Input</li> </ul> <p>Available in API version 57.0 and later.</p>
inputContext	<p><b>Field Type</b> string</p> <p><b>Description</b> The JSON file with features that act as context for the feature extractor. This data can also include the data in the uploaded CSV file. Available in API version 57.0 and later.</p>
masterLabel	<p><b>Field Type</b> string</p> <p><b>Description</b> Required.</p> <p>A user-friendly name for the feature extractor, which is defined when the feature extractor is created.</p>

## Declarative Metadata Sample Definition

The following is an example of an AIUsecaseDefinition component.

```
<?xml version="1.0" encoding="UTF-8"?>
<AIUsecaseDefinition xmlns="http://soap.sforce.com/2006/04/metadata">
  <aiUsecaseFieldMappings>
    <developerName>DevName1</developerName>
    <mappedFieldName>Name</mappedFieldName>
  </aiUsecaseFieldMappings>
</AIUsecaseDefinition>
```

```

    <mappedFieldType>INSIGHT</mappedFieldType>
    <masterLabel>DevName</masterLabel>
    <responseFieldName>AnnualRevenue</responseFieldName>
    <responseObject>Lead</responseObject>
    <sequenceNumber>2</sequenceNumber>
  </aiUsecaseFieldMappings>
  <aiUsecaseFieldMappings>
    <developerName>DevName2</developerName>
    <mappedFieldName>Value</mappedFieldName>
    <mappedFieldType>INSIGHT</mappedFieldType>
    <masterLabel>DevName</masterLabel>
    <responseFieldName>Id</responseFieldName>
    <responseObject>Account</responseObject>
    <sequenceNumber>2</sequenceNumber>
  </aiUsecaseFieldMappings>
  <aiUsecaseFieldMappings>
    <developerName>DevName3</developerName>
    <mappedFieldName>Score</mappedFieldName>
    <mappedFieldType>PREDICTION_SCORE</mappedFieldType>
    <masterLabel>DevName</masterLabel>
    <responseFieldName>Company</responseFieldName>
    <responseObject>Lead</responseObject>
  </aiUsecaseFieldMappings>
  <aiUsecaseFieldMappings>
    <developerName>DevName4</developerName>
    <mappedFieldName>RecordId</mappedFieldName>
    <mappedFieldType>SECONDARY_RESPONSE_RECORD_ID</mappedFieldType>
    <masterLabel>DevName</masterLabel>
    <responseFieldName>Address</responseFieldName>
    <responseObject>Lead</responseObject>
  </aiUsecaseFieldMappings>
  <aiUsecaseFieldMappings>
    <developerName>DevName1</developerName>
    <mappedFieldName>UsecaseModel1.inputScore</mappedFieldName>
    <mappedFieldType>PREDICTION_SCORE_INPUT</mappedFieldType>
    <masterLabel>DevName</masterLabel>
    <responseFieldName>Score</responseFieldName>
    <responseObject>LeadOutputDMO</responseObject>
    <joinFieldName>LeadId</sequenceNumber>
  </aiUsecaseFieldMappings>
  <aiUsecaseModels>
    <aiFeatureExtractors>
      <className>01pxx0000004X2CAAU</className>
      <extractorType>APEX</extractorType>
      <developerName>DevName2</developerName>
      <masterLabel>DevName</masterLabel>
      <featureInputType>Realtime_Input</featureInputType>
      <inputContext>"{columnNames=[column1, column2], rawData=[S,
315090]}}"</inputContext>
      <batchInputSourceIdentifier>DatasetName</batchInputSourceIdentifier>
      <batchInputSourceType>CRMA</batchInputSourceType>
    </aiFeatureExtractors>
    <defaultFeatureExtractor>
      <className>01pxx0000004X0aAAE</className>

```

```

    <extractorType>APEX</extractorType>
    <developerName>DevName1</developerName>
    <masterLabel>DevName</masterLabel>
    <featureInputType>Realtime_Input</featureInputType>
    <inputContext>"{columnNames=[column1, column2], rawData=[S,
315090]}"}"</inputContext>
    <batchInputSourceIdentifier>DatasetName</batchInputSourceIdentifier>
  </defaultFeatureExtractor>
  <developerName>DevName1</developerName>
  <masterLabel>DevName</masterLabel>
  <predictionDefinition>PredictionDefinitionD</predictionDefinition>
  <predictionPlatform>Einstein_Discovery</predictionPlatform>
  <arePredctGenInRealTime>true</arePredctGenInRealTime>
</aiUsecaseModels>
<aiUsecaseModels>
  <developerName>DevName2</developerName>
  <masterLabel>DevName</masterLabel>
  <predictionDefinition>PredictionDefinitionBA</predictionDefinition>
  <predictionPlatform>Einstein_Discovery</predictionPlatform>
  <arePredctGenInRealTime>true</arePredctGenInRealTime>
</aiUsecaseModels>
<aiUsecaseModels>
  <developerName>DevName3</developerName>
  <masterLabel>DevName</masterLabel>
  <predictionDefinition>PredictionDefinitionCA</predictionDefinition>
  <predictionPlatform>Einstein_Discovery</predictionPlatform>
  <arePredctGenInRealTime>true</arePredctGenInRealTime>
</aiUsecaseModels>
<masterLabel>DevName</masterLabel>
<maximumInsightCount>3</maximumInsightCount>
<maximumSuggestionCount>3</maximumSuggestionCount>
<maximumRecommendationCount>3</maximumRecommendationCount>
<primaryResponseObject>Lead</primaryResponseObject>
<secondaryResponseObject>Account</secondaryResponseObject>
<recommendationResponseObject>Contact</recommendationResponseObject>
<shouldSaveFeatures>true</shouldSaveFeatures>
<shouldSaveInsights>true</shouldSaveInsights>
<shouldSaveRecommendation>false</shouldSaveRecommendation>
<shouldSaveRequestResponse>false</shouldSaveRequestResponse>
<shouldSaveScore>true</shouldSaveScore>
<shouldSaveSuggestions>true</shouldSaveSuggestions>
<suggestionImpactMinimumPct>50</suggestionImpactMinimumPct>
<usecaseName>FTestSampleMLUsecase</usecaseName>
<recommendationSource>Next_Best_Action_Flow</recommendationSource>
<creatorType>INTERNAL_USER</creatorType>
</AIUsecaseDefinition>

```

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>*AIUsecaseDefinition*</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](#).

## AI Accelerator Tooling 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](#).

### [AIFeatureExtractor](#)

Represents information about the feature extractor that's used to extract the data required by the machine learning model for making predictions. This object is available in API version 55.0 and later.

### [AIUsecaseDefinition](#)

Represents a collection of fields that are used to set up the use case for which real-time predictions are to be made. This object is available in API version 55.0 and later.

### [AIUsecaseFieldMapping](#)

Represents information about the field mapping that's used to save the extracted features, scores, insights, and recommendations for a prediction. This object is available in API version 55.0 and later.

### [AIUsecaseModel](#)

Represents information about the object that stores the machine learning models that generate predictions for use cases. This object is available in API version 55.0 and later.


### EDITIONS

Available in: Lightning Experience

Available when the admin settings for AI Accelerator and for the product related to the use case are enabled. The Salesforce org must have the CRM Plus license and the product's CRM license.

## AIFeatureExtractor

Represents information about the feature extractor that's used to extract the data required by the machine learning model for making predictions. 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
AiUsecaseModelId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The use case model that's related to the feature extractor. This is a relationship field.</p> <p><b>Relationship Name</b> AiUsecaseModel</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> AIUsecaseModel</p>
BatchInputSourceIdentifier	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The identifier of the input source containing batch job-computed features that a model can use to generate predictions. Available in API version 57.0 and later.</p>
ClassName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The Apex class name of the feature extractor.</p>
DeveloperName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The developer name of the feature extractor.</p> <p> <b>Note:</b> Only users with View DeveloperName OR View Setup and Configuration permission can view, group, sort, and filter this field.</p>

Field	Details
FeatureInputType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> The type of feature input that's used in generating predictions. Available in API version 57.0 and later.  Possible values are:</p> <ul style="list-style-type: none"> <li>• Batch_And_Realtime_Input</li> <li>• Batch_Input</li> <li>• Realtime_Input</li> <li>• Sample_Input</li> </ul> <p>The default value is Realtime_Input.</p>
InputContext	<p><b>Type</b> textarea</p> <p><b>Properties</b> Create, Nillable, Update</p> <p><b>Description</b> The features that serve as the context for the feature extractor in the JSON or CSV file. Available in API version 57.0 and later.</p>
Language	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The language of the feature extractor.</p>
ManageableState	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Indicates the manageable state of the specified component that is contained in a package.  Possible values are:</p> <ul style="list-style-type: none"> <li>• beta—Managed-Beta</li> <li>• deleted—Managed-Proposed-Deleted</li> <li>• deprecated—Managed-Proposed-Deprecated</li> <li>• deprecatedEditable—SecondGen-Installed-Deprecated</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>• <code>installed</code>—Managed-Installed</li> <li>• <code>installedEditable</code>—SecondGen-Installed-Editable</li> <li>• <code>released</code>—Managed-Released</li> <li>• <code>unmanaged</code>—Unmanaged</li> </ul>
MasterLabel	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The label for the feature extractor.</p>
NamespacePrefix	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> Namespace prefix associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix.</p>
Type	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The type of the feature extractor. Valid values are:</p> <ul style="list-style-type: none"> <li>• <code>APEX</code></li> <li>• <code>HYBRID</code></li> <li>• <code>JAVA</code></li> </ul> <p>The default value is <code>APEX</code>.</p>

## AIUsecaseDefinition

Represents a collection of fields that are used to set up the use case for which real-time predictions are to be made. 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

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

## Supported REST API Methods

`GET`, `HEAD`, `PATCH`, `Query`

## Fields

Field	Details
CreatorType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> The type of user who created the use case definition that's used by AI Accelerator. Available in API version 57.0 and later.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>INTERNAL_USER</li> <li>SALESFORCE_ADMIN</li> </ul> <p>The default value is INTERNAL_USER.</p>
DeveloperName	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort, Update</p> <p><b>Description</b> The developer name of the use case definition.</p> <p>Only users with View DeveloperName OR View Setup and Configuration permission can view, group, sort, and filter this field.</p>
Language	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The language of the use case definition.</p>
ManageableState	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p>

Field	Details
	<p><b>Description</b></p> <p>Indicates the manageable state of the specified component that is contained in a package.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>beta</code>—Managed-Beta</li> <li>• <code>deleted</code>—Managed-Proposed-Deleted</li> <li>• <code>deprecated</code>—Managed-Proposed-Deprecated</li> <li>• <code>deprecatedEditable</code>—SecondGen-Installed-Deprecated</li> <li>• <code>installed</code>—Managed-Installed</li> <li>• <code>installedEditable</code>—SecondGen-Installed-Editable</li> <li>• <code>released</code>—Managed-Released</li> <li>• <code>unmanaged</code>—Unmanaged</li> </ul>
MasterLabel	<p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Filter, Group, Sort, Update</p> <p><b>Description</b></p> <p>The label for the use case definition.</p>
MaximumInsightCount	<p><b>Type</b></p> <p>int</p> <p><b>Properties</b></p> <p>Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b></p> <p>The maximum number of insights that can be returned by the response.</p>
MaximumRecommendationCount	<p><b>Type</b></p> <p>int</p> <p><b>Properties</b></p> <p>Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b></p> <p>The maximum number of recommendations that can be returned by the Next Best Action Strategy. Available in API version 56.0 and later.</p>
MaximumSuggestionCount	<p><b>Type</b></p> <p>int</p> <p><b>Properties</b></p> <p>Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b></p> <p>The maximum number of suggestions that can be returned by the response.</p>


Field	Details
NamespacePrefix	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> Namespace prefix associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix.</p>
PrimaryResponseObject	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, False, Sort, Update</p> <p><b>Description</b> Specifies the primary object. The object is used to save the scoring response that is based on the field mapping.  A primary response object can be any standard object that is allowed by the use case's cloud or any custom object.</p>
RecommendationResponseObject	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, False, Sort, Update</p> <p><b>Description</b> The object in which the recommendations created by the Next Best Action Strategy are saved.</p>
RecommendationSource	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The tool or platform that generates recommendations. Available in API version 57.0 and later.  Possible values are:</p> <ul style="list-style-type: none"> <li>• Next_Best_Action_Flow</li> <li>• None</li> </ul> <p>The default value is Next_Best_Action_Flow.</p>
SecondaryResponseObject	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, False, Sort, Update</p>

Field	Details
	<p><b>Description</b></p> <p>Specifies the secondary object. The object is used to save the scoring response that is based on the field mapping.</p> <p>A secondary response object can be any standard object that is allowed by the use case's cloud or any custom object.</p>
ShouldSaveFeatures	<p><b>Type</b></p> <p>boolean</p> <p><b>Properties</b></p> <p>Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b></p> <p>Indicates whether to save the features extracted for the scoring request (<code>true</code>) or not (<code>false</code>).</p> <p>The default value is <code>false</code>.</p>
ShouldSaveInsights	<p><b>Type</b></p> <p>boolean</p> <p><b>Properties</b></p> <p>Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b></p> <p>Indicates whether to save the prediction insights used to generate the score (<code>true</code>) or not (<code>false</code>).</p> <p>The default value is <code>false</code>.</p>
ShouldSaveRecommendation	<p><b>Type</b></p> <p>boolean</p> <p><b>Properties</b></p> <p>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b></p> <p>Indicates whether to save the recommendations created by the Next Best Action Strategy.</p> <p>The default value is <code>false</code>.</p>
ShouldSaveRequestResponse	<p><b>Type</b></p> <p>boolean</p> <p><b>Properties</b></p> <p>Defaulted on create, Filter, Group, Sort</p> <p><b>Description</b></p> <p>Indicates whether to save the scoring request response (<code>true</code>) or not (<code>false</code>).</p> <p>The default value is <code>false</code>.</p>

Field	Details
ShouldSaveScore	<p><b>Type</b> boolean</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> Indicates whether to save the prediction score (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
ShouldSaveSuggestions	<p><b>Type</b> boolean</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> Indicates whether to save the suggestions for improving the prediction score (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
SuggestionImpactMinimumPct	<p><b>Type</b> int</p> <p><b>Properties</b> Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The minimum eligible percentage for improving the existing prediction score based on suggestions. Suggestions with an impact greater than the specified percentage on the score are displayed on the prediction scorecard.</p>
UsecaseName	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Restricted picklist, Sort</p> <p><b>Description</b> The unique name of the use case definition.</p>

## AIUsecaseFieldMapping

Represents information about the field mapping that's used to save the extracted features, scores, insights, and recommendations for a prediction. 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()`, `describeObjects()`, `query()`, `retrieve()`, `update()`, `upsert()`

## Supported REST API Methods

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

## Fields

Field	Details
<code>AiUsecaseDefinitionId</code>	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> Required. The ID of the use case definition that's related to the field mapping. This is a relationship field.</p> <p><b>Relationship Name</b> AiUsecaseDefinition</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> AiUsecaseDefinition</p>
<code>DeveloperName</code>	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The developer name of the use case field mapping.</p> <p> <b>Note:</b> Only users with View DeveloperName OR View Setup and Configuration permission can view, group, sort, and filter this field.</p>
<code>Language</code>	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The language of the use case field mapping.</p>
<code>ManageableState</code>	<p><b>Type</b> ManageableState enumerated list</p>

Field	Details
	<p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Indicates the manageable state of the specified component that is contained in a package:</p> <ul style="list-style-type: none"> <li>• beta</li> <li>• deleted</li> <li>• deprecated</li> <li>• deprecatedEditable</li> <li>• installed</li> <li>• installedEditable</li> <li>• released</li> <li>• unmanaged</li> </ul> <p>Available in API version 56.0 and later.</p>
MappedFieldName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The name of the field where the prediction scoring response is stored.</p>
MappedFieldType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> The type of the response field. Valid values are:</p> <ul style="list-style-type: none"> <li>• FEATURE</li> <li>• INSIGHT</li> <li>• PREDICTION_SCORE</li> <li>• SUGGESTION</li> </ul> <p>The default value is FEATURE.</p>
MasterLabel	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p>

Field	Details
	<p><b>Description</b></p> <p>The label for the use case field mapping.</p>
NamespacePrefix	<p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Filter, Group, Nillable, Sort</p> <p><b>Description</b></p> <p>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 <b><i>namespacePrefix__componentName</i></b> notation.</p> <p>The namespace prefix can have one of the following values:</p> <ul style="list-style-type: none"> <li>• In Developer Edition organizations, the namespace prefix is set to the namespace prefix of the organization for all objects that support it. There is an exception if an object is in an installed managed package. In that case, the object has the namespace prefix of the installed managed package. This field's value is the namespace prefix of the Developer Edition organization of the package developer.</li> <li>• In organizations that are not Developer Edition organizations, <b>NamespacePrefix</b> is only set for objects that are part of an installed managed package. There is no namespace prefix for all other objects.</li> </ul> <p>Available in API version 56.0 and later.</p>
ResponseFieldName	<p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Sort, Update</p> <p><b>Description</b></p> <p>The name of the response object's field that's mapped to the field storing the scoring response.</p>
ResponseObject	<p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Sort, Update</p> <p><b>Description</b></p> <p>The object whose field is mapped to the field storing the scoring response.</p>
SequenceNumber	<p><b>Type</b></p> <p>int</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<b>Description</b> The sequence number for the information stored in the field mapping.

## AIUsecaseModel

Represents information about the object that stores the machine learning models that generate predictions for use cases. 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()`, `describeObjects()`, `query()`, `retrieve()`, `update()`, `upsert()`

## Supported REST API Methods

DELETE, GET, HEAD, PATCH, POST, Query

## Fields

Field	Details
<code>AiFeatureExtractorId</code>	<b>Type</b> reference  <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update  <b>Description</b> The ID of the feature extractor that's related to the use case model. This is a relationship field.  <b>Relationship Name</b> AiFeatureExtractor  <b>Relationship Type</b> Lookup  <b>Refers To</b> AiFeatureExtractor
<code>AiUsecaseDefinitionId</code>	<b>Type</b> reference  <b>Properties</b> Create, Filter, Group, Sort, Update  <b>Description</b> The ID of the use case definition that's associated with the use case model.

Field	Details
	<p>This is a relationship field.</p> <p><b>Relationship Name</b> AiUsecaseDefinition</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> AIUsecaseDefinition</p>
DeveloperName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The developer name of the use case model.</p> <p> <b>Note:</b> Only users with View DeveloperName OR View Setup and Configuration permission can view, group, sort, and filter this field.</p>
Language	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The language of the use case model.</p>
ManageableState	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Indicates the manageable state of the specified component that is contained in a package. Possible values are:</p> <ul style="list-style-type: none"> <li>• beta—Managed-Beta</li> <li>• deleted—Managed-Proposed-Deleted</li> <li>• deprecated—Managed-Proposed-Deprecated</li> <li>• deprecatedEditable—SecondGen-Installed-Deprecated</li> <li>• installed—Managed-Installed</li> <li>• installedEditable—SecondGen-Installed-Editable</li> <li>• released—Managed-Released</li> <li>• unmanaged—Unmanaged</li> </ul>

Field	Details
MasterLabel	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The label for the use case model.</p>
NamespacePrefix	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> Namespace prefix associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix.</p>
PredictionDefinition	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, idLookup, Sort, Update</p> <p><b>Description</b> The unique identifier of the prediction definition that's related to the use case model. This identifier can be an external ID.</p>
PredictionPlatform	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> The platform on which the machine learning model is created and deployed. Available in API version 57.0 and later. Possible values are:</p> <ul style="list-style-type: none"> <li>• Default</li> <li>• Einstein_Discovery</li> </ul> <p>The default value is Einstein_Discovery.</p>

## Scoring Framework

Use the Scoring Framework developer resources to define the template configurations that are used to create CRM Analytics apps. Generate scores for your predictive use cases using the preconfigured recipes and Einstein Discovery models installed with the CRM Analytics apps.

[Scoring Framework Metadata Types](#)

Use the Scoring Framework metadata types to define the machine learning model that's used to generate scores for your predictive use cases.

[Scoring Framework Tooling 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](#).

## Scoring Framework Metadata Types


Use the Scoring Framework metadata types to define the machine learning model that's used to generate scores for your predictive use cases.

[AIScoringModelDefinition](#)

Represents information about a machine learning model that's used by the Scoring Framework for Industries Cloud Einstein. The machine learning model is used for scoring, including its configuration.

### AIScoringModelDefinition

Represents information about a machine learning model that's used by the Scoring Framework for Industries Cloud Einstein. The machine learning model is used for scoring, including its configuration.

 **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

`AIScoringModelDefinition` components have the suffix `.aiScoringModelDefinition` and are stored in the `aiScoringModelDefinitions` folder.

### Version

`AIScoringModelDefinition` components are available in API version 58.0 and later.

### Special Access Rules

To access this metadata type, you must have the AI Accelerator User permission set with Scoring Framework enabled for Industries Cloud Einstein from Salesforce Setup. The Salesforce org must have the CRM Plus license and the product's CRM license.

#### EDITIONS

Available in: Lightning Experience

Available when the admin settings for AI Accelerator and for the product related to the use case are enabled. The Salesforce org must have the CRM Plus license and the product's CRM license.

## Fields

Field Name	Description
aiModelConfig	<b>Field Type</b> string <b>Description</b> Required. ID of an AI model configuration related to the AI scoring model record.
aiScoringModelDefVersions	<b>Field Type</b> <a href="#">AIScoringModelDefVersion[]</a> <b>Description</b> Represents information of various versions of a model.
description	<b>Field Type</b> string <b>Description</b> Description for an AIscoringModelDefinition record.
masterLabel	<b>Field Type</b> string <b>Description</b> Required. A user-friendly name for the AIscoringModelDefinition metadata component, which is defined when the AIscoringModelDefinition metadata component is created.

## AIscoringModelDefVersion

Represents information about a version of an AI scoring model.

Field Name	Description
aiScoringModelDefinition	<b>Field Type</b> string <b>Description</b> Required. Parent AIscoringModelDefinition record that's related to an AIscoringModelDefVersion record.
aiScoringSteps	<b>Field Type</b> <a href="#">AIscoringStep[]</a>

Field Name	Description
	<b>Description</b> Represents information about a step associated with an AI scoring model version.
developerName	<b>Field Type</b> string <b>Description</b> 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. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization. Label is <b>Record Type Name</b> .
masterLabel	<b>Field Type</b> string <b>Description</b> Required. A user-friendly name for the AIScoringModelDefVersion component name, which is defined when the AIScoringModelDefVersion component name is created.
modelMode	<b>Field Type</b> AIScoringModelDefVersionMode (enumeration of type string) <b>Description</b> Required. Mode of an AI scoring model. Values are: <ul style="list-style-type: none"> <li>• DEPLOY</li> <li>• TRAIN</li> <li>• TRAIN_AND_DEPLOY</li> </ul>

## AIScoringStep

Represents information about a step associated with an AI scoring model version. For example, an AI scoring step can include steps, such as propensity to purchase products or prediction scores for accounts.

Field Name	Description
aiModelConfigStep	<b>Field Type</b> string

Field Name	Description
	<b>Description</b> Required. ID of the AI model config step that's related to the AIScoringStep record.
stepDetail	<b>Field Type</b> string <b>Description</b> Scoring step details in JSON format.

## Declarative Metadata Sample Definition

Here's an example of an AIScoringModelDefinition component.

```
<?xml version="1.0" encoding="UTF-8"?>
<AIScoringModelDefinition xmlns="http://soap.sforce.com/2006/04/metadata">
  <aiModelConfig>Prediction_Scores_for_Accounts</aiModelConfig>
  <aiScoringModelDefVersions>
    <fullName>V1</fullName>
    <aiScoringModelDefinition>Test</aiScoringModelDefinition>
    <aiScoringSteps>

<aiModelConfigStep>Prediction_Scores_for_Accounts.GrainSelector</aiModelConfigStep>
    <stepDetail>{label:Account,name:Account}</stepDetail>
  </aiScoringSteps>
  <aiScoringSteps>

<aiModelConfigStep>Prediction_Scores_for_Accounts.AugmentedDataset</aiModelConfigStep>
    </aiScoringSteps>
  <aiScoringSteps>

<aiModelConfigStep>Prediction_Scores_for_Accounts.TargetConditionBuilder</aiModelConfigStep>
    <stepDetail>{specificOutcomeDefined:Yes,label:Financial accounts are associated
with an account,name:FA_Target}</stepDetail>
    </aiScoringSteps>
  <aiScoringSteps>

<aiModelConfigStep>Prediction_Scores_for_Accounts.InputVariableSelector</aiModelConfigStep>
    </aiScoringSteps>
  <aiScoringSteps>

<aiModelConfigStep>Prediction_Scores_for_Accounts.CustomFilter</aiModelConfigStep>
    </aiScoringSteps>
  <aiScoringSteps>

<aiModelConfigStep>Prediction_Scores_for_Accounts.WriteBackConnector</aiModelConfigStep>
    </aiScoringSteps>
```

```

    <developerName>V1</developerName>
    <masterLabel>V1</masterLabel>
    <modelMode>TRAIN_AND_DEPLOY</modelMode>
  </aiScoringModelDefVersions>
  <description>Test for metadata</description>
  <masterLabel>Test</masterLabel>
</AIScoringModelDefinition>

```

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>AIScoringModelDefVersion</name>
  </types>
  <types>
    <members>*</members>
    <name>AIScoringModelDefinition</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](#).

## Scoring Framework Tooling 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](#).

### [AINaturalLangProcessRslt](#)

Represents information about the object that stores the result of a natural language processing (NLP) operation. This object is available in API version 57.0 and later.

### [AIScoringModelDefinition](#)

Represents information about a machine learning model that's used by the Scoring Framework for Industries Cloud Einstein. The machine learning model is used for scoring, including its configuration. This object is available in API version 57.0 and later.

### [AIScoringModelDefVersion](#)

Represents information about a version of an AI scoring model that's used by the Scoring Framework for Industries Cloud Einstein. This object is available in API version 57.0 and later.

### [AIScoringStep](#)

Represents information about a step associated with an AI scoring model version that's used by the Scoring Framework for Industries Cloud Einstein. This object is available in API version 57.0 and later.

## EDITIONS

Available in: Lightning Experience

Available with the AI Accelerator User permission set when Scoring Framework is enabled for Industries Cloud Einstein from Salesforce Setup. The Salesforce org must have the CRM Plus license and the product's CRM license.

## AINaturalLangProcessRslt

Represents information about the object that stores the result of a natural language processing (NLP) operation. This object is available in API version 57.0 and later.

### Supported SOAP API Calls

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

### Supported REST API Methods

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

### Fields

Field	Details
Reference Record	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The ID of the record with the text field that's processed by an AI natural language process request.</p> <p><b>Relationship Type</b> Lookup</p>
Text Field	<p><b>Type</b> string</p> <p><b>Description</b> The field storing the text that's processed by an natural language process request.</p>
Service Name	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> Specifies the name of the service that's used to process an AI natural language process request.</p>
Response	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Restricted picklist, Sort</p> <p><b>Description</b> The response received after an AI natural language process request is processed.</p>

Field	Details
Status	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> Specifies the status of an AI natural language process request.</p>
Additional Information	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> Additional information about the request and result of the natural language processing. For example, this field can store the input prompt that's part of the request and the length of the response.</p>
Source Record	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The ID of the source record for which an AI natural language process request is processed.</p> <p><b>Relationship Type</b> Lookup</p>
AI Scoring Model Definition Version	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The AI Scoring Model Definition Version record that's used to process an AI natural language process request.</p> <p><b>Relationship Type</b> Lookup</p>
Request Text	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> The text that's processed by an AI natural language process request in the absence of any reference or source record.</p>

Field	Details
Language	<b>Type</b> picklist <b>Properties</b> Filter, Group, Restricted picklist, Sort <b>Description</b> The language of the text that's processed.
Processed Chunk Count	<b>Type</b> string <b>Properties</b> Filter, Group, Sort <b>Description</b> The number of chunks that have been processed.
Custom Object List	<b>Type</b> picklist <b>Properties</b> Filter, Group, Restricted picklist, Sort <b>Description</b> The list of custom objects used for processing an AI natural language processing request.

## AI Scoring Model Definition

Represents information about a machine learning model that's used by the Scoring Framework for Industries Cloud Einstein. The machine learning model is used for scoring, including its configuration. This object is available in API version 57.0 and later.



**Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

## Supported SOAP API Calls

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

## Supported REST API Methods

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

## Special Access Rules

To access this object, you must have the AI Accelerator User permission set with Scoring Framework enabled for Industries Cloud Einstein from Salesforce Setup. The Salesforce org must have the CRM Plus license and the product's CRM license.

## Fields

Field	Details
AiModelConfig	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Restricted picklist, Sort</p> <p><b>Description</b> ID of an AI model configuration related to the AI scoring model record. Valid values are:</p> <ul style="list-style-type: none"> <li>• <b>Prediction_Scores_for_Accounts</b>—Get predictions based on your account data.</li> <li>• <b>Propensity_to_Purchase_Products</b>—Get predictions about the customers' likelihood of purchasing products.</li> <li>• <b>FSCAccountContactScore</b>—Get predictions based on your account or contact data for Financial Services Cloud.</li> <li>• <b>FSCP propensity</b>—Get predictions about the customers' likelihood of purchasing products for Financial Services Cloud.</li> <li>• <b>Student_Prospect_Score</b>—Get predictions about prospects that are likely to convert to students for Education Cloud.</li> <li>• <b>Opp_Scoring</b>—Get predictions about opportunities that are likely to convert to accounts for Automotive Cloud.</li> <li>• <b>Lead_Scoring</b>—Used to get predictions about leads that are likely to convert to opportunities or accounts for Automotive Cloud.</li> </ul>
Description	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> Description for an AIScoringModelDefinition record.</p>
DeveloperName	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> The unique name of the object in the API. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization. Label is <b>Record Type Name</b>.</p>

Field	Details
FullName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Group, Nillable</p> <p><b>Description</b> Full name of the associated AIScoringModelDefinition object in Metadata API. The full name can include a namespace prefix. Available in API version 58.0 and later.</p> <p>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.</p>
Language	<p><b>Type</b> picklist</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Language of the AIScoringModelDefinition object.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> <li>• da—Danish</li> <li>• de—German</li> <li>• en_US—English</li> <li>• es—Spanish</li> <li>• es_MX—Spanish (Mexico)</li> <li>• fi—Finnish</li> <li>• fr—French</li> <li>• it—Italian</li> <li>• ja—Japanese</li> <li>• ko—Korean</li> <li>• nl_NL—Dutch</li> <li>• no—Norwegian</li> <li>• pt_BR—Portuguese (Brazil)</li> <li>• ru—Russian</li> <li>• sv—Swedish</li> <li>• th—Thai</li> <li>• zh_CN—Chinese (Simplified)</li> <li>• zh_TW—Chinese (Traditional)</li> </ul>
MasterLabel	<p><b>Type</b> string</p>

Field	Details
	<b>Properties</b> Filter, Group, Sort  <b>Description</b> Label for the AIScoringModelDefinition object. In the UI, this field is AI Scoring Model Definition.
Metadata	<b>Type</b> <a href="#">AIScoringModelDefinition</a>  <b>Properties</b> Create, Nillable, Update  <b>Description</b> The AIScoringModelDefinition'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.
Versions	<b>Type</b> complexvalue  <b>Properties</b> Create, Nillable, Update  <b>Description</b> Represents information of various versions of an AI scoring model.

## AIScoringModelDefVersion

Represents information about a version of an AI scoring model that's used by the Scoring Framework for Industries Cloud Einstein. This object is available in API version 57.0 and later.



**Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

## Supported SOAP API Calls

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

## Supported REST API Methods

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

## Special Access Rules

To access this object, you must have the AI Accelerator User permission set with Scoring Framework enabled for Industries Cloud Einstein from Salesforce Setup. The Salesforce org must have the CRM Plus license and the product's CRM license.

## Fields

Field	Details
AIModelDefinitionId	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> ID of the parent AIModelDefinition record that's related to an AIModelDefVersion record.  This field is a relationship field.</p> <p><b>Relationship Name</b> AIModelDefinition</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> AIModelDefinition</p>
AdditionalInformation	<p><b>Type</b> textarea</p> <p><b>Properties</b> Nillable</p> <p><b>Description</b> Stores the metadata about a scoring model version.</p>
AIUseCaseDefinitionId	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> ID of the parent AIUseCaseDefinition record that's related to an AIModelDefVersion record.  This field is a relationship field.</p> <p><b>Relationship Name</b> AIUseCaseDefinition</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> AIUseCaseDefinition</p>
DeveloperName	<p><b>Type</b> string</p>

Field	Details
	<p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> The unique name of the object in the API. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization. Label is <b>Record Type Name</b>.</p>
FullName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Group, Nillable</p> <p><b>Description</b> The full name of the associated AIScoringModelDefVersion object in Metadata API. The full name can include a namespace prefix.  Query this field only if the query result contains no more than one record. Otherwise, an error is returned. If more than one record exists, use multiple queries to retrieve the records. This limit protects performance.</p>
Language	<p><b>Type</b> picklist</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> The language of the AIScoringModelDefinition object. Valid values are:</p> <ul style="list-style-type: none"> <li>• da—Danish</li> <li>• de—German</li> <li>• en_US—English</li> <li>• es—Spanish</li> <li>• es_MX—Spanish (Mexico)</li> <li>• fi—Finnish</li> <li>• fr—French</li> <li>• it—Italian</li> <li>• ja—Japanese</li> <li>• ko—Korean</li> <li>• nl_NL—Dutch</li> <li>• no—Norwegian</li> <li>• pt_BR—Portuguese (Brazil)</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>• ru—Russian</li> <li>• sv—Swedish</li> <li>• th—Thai</li> <li>• zh_CN—Chinese (Simplified)</li> <li>• zh_TW—Chinese (Traditional)</li> </ul>
MasterLabel	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> Label for the AIScoringModelDefVersion object. In the UI, this field is AI scoring model definition version.</p>
Metadata	<p><b>Type</b> <a href="#">AIScoringModelDefinition</a></p> <p><b>Properties</b> Create, Nillable, Update</p> <p><b>Description</b> The AIScoringModelDefinition'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.</p>
ModelMode	<p><b>Type</b> picklist</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Restricted picklist, Sort</p> <p><b>Description</b> Mode of an AI scoring model.  Valid values are:</p> <ul style="list-style-type: none"> <li>• DEPLOY</li> <li>• TRAIN</li> <li>• TRAIN_AND_DEPLOY</li> </ul> <p>The default value is TRAIN_AND_DEPLOY.</p>
Status	<p><b>Type</b> picklist</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p>

Field	Details
	<p><b>Description</b></p> <p>Status of an AIScoringModelDefVersion record. Available in API version 58.0 and later.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> <li>• ACTIVATING</li> <li>• ACTIVATIONFAILED</li> <li>• ACTIVE</li> <li>• DEACTIVATING</li> <li>• DEACTIVATIONFAILED</li> <li>• DRAFT</li> <li>• FAILED</li> <li>• INACTIVE</li> </ul>
Steps	<p><b>Type</b></p> <p>complexvalue</p> <p><b>Properties</b></p> <p>Nullable, Update</p> <p><b>Description</b></p> <p>Represents information about a step associated with an AI scoring model version. Available in API version 58.0 and later.</p>

## AIScoringStep

Represents information about a step associated with an AI scoring model version that's used by the Scoring Framework for Industries Cloud Einstein. This object is available in API version 57.0 and later.

 **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

## Supported SOAP API Calls

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

## Supported REST API Methods

`GET`, `HEAD`, `PATCH`, `Query`

## Special Access Rules

To access this object, you must have the AI Accelerator User permission set with Scoring Framework enabled for Industries Cloud Einstein from Salesforce Setup. The Salesforce org must have the CRM Plus license and the product's CRM license.

## Fields

Field	Details
AiModelConfigStep	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Restricted picklist, Sort</p> <p><b>Description</b> ID of the AI model config step that's related to the AIScoringStep record.</p>
AiScoringModelDefVersionId	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> ID of the AIScoringModelDefVersion record that's related to the AIScoringStep record.  This field is a relationship field.</p> <p><b>Relationship Name</b> AiScoringModelDefVersion</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> AiScoringModelDefVersion</p>
StepDetail	<p><b>Type</b> textarea</p> <p><b>Properties</b> Nillable, Update</p> <p><b>Description</b> Scoring step details in JSON format.</p>
ValidationStatus	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> Status of the business validations executed on the details that are captured in the scoring step. Available in API version 58.0 and later.  Possible values are:</p> <ul style="list-style-type: none"> <li>• DRAFT</li> <li>• FAILED</li> <li>• PENDING</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>• SUCCESS</li> </ul>
ValidationStatusResult	<p><b>Type</b> textarea</p> <p><b>Properties</b> Nillable</p> <p><b>Description</b> Result of the business validations executed on the details that are captured in the scoring step. Available in API version 58.0 and later.</p>

## Action Launcher

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.

### [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.

### [Action Launcher Metadata Types](#)

Use the Action Launcher metadata types to set up your Action Launcher deployment.

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	<p><b>Type</b> mns:<a href="#">RecordActionDeploymentChannel</a></p> <p><b>Properties</b> Not applicable.</p> <p><b>Description</b> Channel default settings for the deployment. This field is visible only in the metadata for a record.</p>
ComponentName	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Specifies the name of the component used in the deployment. Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>ActionsAndRecommendations—0</code></li> <li>• <code>ActionLauncher—1</code></li> <li>• <code>BulkActionPanel—2</code>. This value is available in API version 60.0 and later.</li> </ul> <p>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.</p>
DeploymentContexts	<p><b>Type</b> mns:<a href="#">RecordActionDeploymentContext</a></p> <p><b>Properties</b> Not applicable.</p> <p><b>Description</b> Object context for the deployment. This field is visible only in the metadata for a record. Available in API version 46.0 and later.</p>
DeveloperName	<p><b>Type</b> string</p>

Field	Details
	<p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> 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.</p> <p> <b>Note:</b> Only users with View DeveloperName OR View Setup and Configuration permission can view, group, sort, and filter this field.</p>
FullName	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> The unique name used as the record action deployment identifier for API access. The <code>fullName</code> 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.</p> <p>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.</p>
HasGuidedActions	<p><b>Type</b> boolean</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Sort</p> <p><b>Description</b> If <code>true</code>, indicates that the component shows standard actions; for example, flows and quick actions. Available in API version 46.0 and later.</p>
HasComponents	<p><b>Type</b> boolean</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Sort</p> <p><b>Description</b> Indicates whether the record actions deployment includes components (<code>true</code>) or not (<code>false</code>).</p>
HasOmniScripts	<p><b>Type</b> boolean</p>

Field	Details
	<p><b>Properties</b> Defaulted on create, Filter, Group, Sort</p> <p><b>Description</b> Indicates whether the record actions deployment includes OmniScripts (<code>true</code>) or not (<code>false</code>). Available in API version 56.0 and later.  The default value is <code>false</code>.</p>
HasRecommendations	<p><b>Type</b> boolean</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Sort</p> <p><b>Description</b> If <code>true</code>, indicates that the component shows recommendations from a Next Best Action strategy. Available in API version 46.0 and later.</p>
Language	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The language of the record action deployment. The following values are supported:</p> <ul style="list-style-type: none"> <li>Chinese (Simplified): <code>zh_CN</code></li> <li>Chinese (Traditional): <code>zh_TW</code></li> <li>Danish: <code>da</code></li> <li>Dutch: <code>nl_NL</code></li> <li>English: <code>en_US</code></li> <li>Finnish: <code>fi</code></li> <li>French: <code>fr</code></li> <li>German: <code>de</code></li> <li>Italian: <code>it</code></li> <li>Japanese: <code>ja</code></li> <li>Korean: <code>ko</code></li> <li>Norwegian: <code>no</code></li> <li>Portuguese (Brazil): <code>pt_BR</code></li> <li>Russian: <code>ru</code></li> <li>Spanish: <code>es</code></li> <li>Spanish (Mexico): <code>es_MX</code> Spanish (Mexico) defaults to Spanish for customer-defined translations.</li> <li>Swedish: <code>sv</code></li> <li>Thai: <code>th</code> The Salesforce user interface is fully translated to Thai, but Help is in English.</li> </ul>

Field	Details
ManageableState	<p><b>Type</b> ManageableState enumerated list</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Indicates the manageable state of the specified component that is contained in a package:</p> <ul style="list-style-type: none"> <li>• beta</li> <li>• deleted</li> <li>• deprecated</li> <li>• deprecatedEditable</li> <li>• installed</li> <li>• installedEditable</li> <li>• released</li> <li>• unmanaged</li> </ul>
MasterLabel	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> The name of the deployment.</p>
Metadata	<p><b>Type</b> mns:<a href="#">RecordActionDeployment</a></p> <p><b>Properties</b> Create, Nillable, Update</p> <p><b>Description</b> Metadata that defines record action deployments.</p> <p>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.</p>
NamespacePrefix	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> 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</p>

Field	Details
	helps differentiate custom objects and fields from those in use by other record action deployments.
Recommendation	<p><b>Type</b> mns:<a href="#">RecordActionRecommendation</a></p> <p><b>Properties</b> Not applicable.</p> <p><b>Description</b> 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.</p>
SelectableItems	<p><b>Type</b> mns:<a href="#">RecordActionSelectableItem</a></p> <p><b>Properties</b> Not applicable.</p> <p><b>Description</b> A subset of actions that users can launch at runtime. This field is visible only in the metadata for a record.</p>

## 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	<a href="#">RecordActionDeploymentChannel</a>	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: <ul style="list-style-type: none"> <li>• <code>ActionsAndRecommendations—0</code></li> <li>• <code>ActionLauncher—1</code></li> <li>• <code>BulkActionPanel—2</code>. This value is available in API version 60.0 and later</li> </ul> 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	<a href="#">RecordActionDeploymentContext</a>	Specifies the object context for quick actions and Next Best Action strategies. Available in API version 46.0 and later.
hasComponents	boolean	Indicates whether the record actions deployment includes components ( <code>true</code> ) or not ( <code>false</code> ). 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 ( <code>true</code> ) or not ( <code>false</code> ). Available in API version 56.0 and later. The default value is <code>false</code> .
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	<a href="#">RecordActionRecommendation</a>	Specifies settings for how Next Best Action recommendations appear in the component. Available in API version 46.0 and later.
selectableItems	<a href="#">RecordActionDeploymentSelectableItems</a>	Specifies the actions that users can add at runtime.
shouldLaunchActionOnReject	boolean	Required. If <code>true</code> , 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 <code>Verify_Information</code> .
isMandatory	boolean	Specifies whether the action is marked as mandatory. The default value is <code>false</code> .
isUiRemoveHidden	boolean	Specifies whether the remove option is hidden in the UI. The default value is <code>false</code> . If <code>true</code> , 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 <code>Top</code> or <code>Bottom</code> , or unpinned ( <code>None</code> ). The default value is <code>None</code> .
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: <ul style="list-style-type: none"> <li>• <code>Flow</code></li> <li>• <code>QuickAction</code> (Available in API version 46.0 and later.)</li> <li>• <code>OmniScript</code> (Available in API version 56.0 and later.)</li> <li>• <code>LWC</code> (Available in API version 62.0 and later.)</li> <li>• <code>SvcCatalogItemDef</code> (Available in API version 62.0 and later.)</li> <li>• <code>WebLink</code> (Available in API version 62.0 and later.)</li> </ul>

## 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 <code>Phone</code> , <code>Chat</code> , or <code>Default</code> .
channelItems	<a href="#">RecordActionDefaultItem</a>	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 <code>true</code> , the first action is launched. The default value is <code>false</code> .

## 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 <code>true</code> , display the description for the recommendation.
hasImage	boolean	Required. If <code>true</code> , display the image for the recommendation.
hasRejectAction	boolean	Required. If <code>true</code> , display the label that the user clicks to reject the recommendation.
hasTitle	boolean	Required. If <code>true</code> , 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 <code>Verify_Information</code> .
type	RecordActionType (enumeration of type string)	Required. The type of action that's associated with the record. Valid values are: <ul style="list-style-type: none"> <li>Flow</li> <li>QuickAction (Available in API version 46.0 and later.)</li> <li>OmniScript (Available in API version 56.0 and later.)</li> <li>LWC (Available in API version 62.0 and later.)</li> <li>SvcCatalogItemDef (Available in API version 62.0 and later.)</li> </ul>

Field Name	Field Type	Description
		<ul style="list-style-type: none"> <li>WebLink (Available in API version 62.0 and later.)</li> </ul>
isFrequentAction	boolean	<p>Indicates whether an action is frequently accessed by users (<code>true</code>) or not (<code>false</code>). Available in version 57.0 and later.</p> <p>This field applies only to Action Launcher.</p>
frequentActionSequenceNbr	integer	<p>The sequence number that's assigned to a frequently used action that's shown on Action Launcher. Available in version 57.0 and later.</p> <p>This field applies only to Action Launcher.</p>

## 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>

```

## Actionable List Members

Help list creators view actionable list members or prospects, including the existing customers. Enable list creators to set up and assign actionable lists to sales agents or service agents. The agents can then engage with and build trusted relationships with the prospects.

### [Actionable List Members Connect APIs](#)

Use the Actionable List Members Connect APIs to get actionable list members and update the priority, OmniScript key, and assignees of actionable lists.

[Actionable List Members Key Performance Indicator Bar Objects](#)

Use the objects in Key Performance Indicator (KPI) Bar to create custom key performance indicators and map the indicators to actionable lists.

[Actionable List Members Metadata Types](#)

Use the Actionable List Members metadata types to set up Bulk Action Panel.

[Actionable List Members 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.

## SEE ALSO:

[Actionable List Members](#)[Actionable Segmentation Basics](#)[Actionable Segmentation](#)

## Actionable List Members Connect APIs

Use the Actionable List Members Connect APIs to get actionable list members and update the priority, OmniScript key, and assignees of actionable lists.

[Actionable List Members API Resources](#)

Here's the list of the Actionable List Members API resources.

[Actionable List Members API Requests](#)

Here's the list of the Actionable List Members API request bodies.

[Actionable List Members API Responses](#)

Here's the list of the Actionable List Members API response bodies.

## Actionable List Members API Resources

Here's the list of the Actionable List Members API resources.

[Actionable List Members Assignments](#)

Update the priority and OmniScript key in the Actionable List object and update the assignee in the Actionable List Member object.

[Actionable List Member Count](#)

Update the member count of an actionable list.

[Actionable List Member Queues \(GET\)](#)

Fetch a list of queues that contain the actionable list member as a supported object.

[Actionable List Member Search by Using Actionable List ID](#)

Retrieves the actionable list members for the specified actionable list ID.

[Actionable List Member Search by Using Filter Criteria](#)

Get a list of actionable list members by using filter criteria.

## Actionable List Members Assignments

Update the priority and OmniScript key in the Actionable List object and update the assignee in the Actionable List Member object.

### Resource

```
/connect/sales-excellence/actionable-list/assignment/${actionableListId}
```

### Resource Example

```
https://yourInstance.salesforce.com/services/data/v63.0/connect/sales-excellence/actionable-list/assignment/${actionableListId}
```

### Available Version

57.0

### Requires Chatter

No

### HTTP Methods

POST

### Request Body for POST

#### JSON Example

```
{
  "actionableListFields": {
    "priority": "medium",
    "omniScriptKey": "type/subtype/English",
    "sortField": "Phone",
    "sortOrder": "Ascending",
    "isAutoAssignmentAllowed": true
  },
  "actionableListMemberFields": {
    "assignee": {
      "type": "User",
      "name": "User1"
    }
  },
  "autoAssignee": {
    "type": "RecordOwner",
    "name": "RecordOwnerName"
  }
}
```

### Properties

Name	Type	Description	Required or Optional	Available Version
<del>actionableListFields</del>	Actionable List Fields Input	Details of the Actionable List fields	Required	57.0
<del>actionableListMemberFields</del>	Actionable List Member Fields Input	Details of the Actionable List Member fields	Required	57.0

Name	Type	Description	Required or Optional	Available Version
autoAssignee	<a href="#">Auto Assignee Input</a>	Details of the assignees to whom the new members in an actionable list are automatically assigned.	Optional	59.0

**Response Body for POST**[Assign Actionable List](#)**Actionable List Member Count**

Update the member count of an actionable list.

**Resource**

```
/connect/actionable-list-member-count
```

**Available version**

59.0

**Requires Chatter**

No

**HTTP methods**

POST

**Request body for POST****JSON example**

```
{
  "filters": {
    "conditions": [
      {
        "fieldName": "ObjectName",
        "operator": "equals",
        "value": "Account",
        "index": 1
      },
      {
        "fieldName": "Name",
        "operator": "equals",
        "value": "VIPClients",
        "index": 2
      }
    ],
    "filterLogic": "1 AND 2",
    "querySize": 2000
  }
}
```

**Properties**

Specify either an `actionableListId` or `filters`, but not both.

Name	Type	Description	Required or Optional	Available Version
actionable ListId	String	ID of the actionable list to be updated.	Required if no filters	59.0
filters	<a href="#">Actionable List Update Member Count Filter List Input</a>	List of filters to identify the actionable lists to be updated.	Required if no actionable ListId	59.0

**Response body for POST**

[Actionable List Update Member Count Output](#)

**Actionable List Member Queues (GET)**

Fetch a list of queues that contain the actionable list member as a supported object.

**Resource**

```
/connect/sales-excellence/actionable-list-member/queues
```

**Resource Example**

```
https://yourInstance.salesforce.com/services/data/v63.0/connect/sales-excellence/actionable-list-members/queues?searchTerm=Queue&nextPageCursor=0&start
```

**Available version**

59.0

**Requires Chatter**

No

**HTTP methods**

GET

**Request parameters for GET**

Parameter Name	Type	Description	Required or Optional	Available Version
nextPageCursor	String	Cursor to fetch the next set of queues.	Optional	59.0
searchTerm	String	Search term to fetch the queues.	Optional	59.0

**Response body for GET**

[Actionable List Member Queues](#)

**Actionable List Member Search by Using Actionable List ID**

Retrieves the actionable list members for the specified actionable list ID.

**Resource**

```
/connect/sales-excellence/actionable-list-members/${actionableListId}
```

**Resource Example**

```
https://yourInstance.salesforce.com/services/data/v63.0/connect/sales-excellence/actionable-list-members/{actionableListId}
```

**Available Version**

57.0

**Requires Chatter**

No

**HTTP Methods**


POST

**Request Body for POST****JSON Example**

```
{
  "searchTerm" : "Julia Green",
  "orderBy" : {
    "orderByList" : [
      {
        "fieldName" : "Name",
        "operator" : "ASC",
        "nulls" : "First"
      }
    ]
  },
  "filters" : {
    "filterList" : [
      {
        "fieldName" : "Name",
        "operator" : "Like",
        "value" : "AL"
      }
    ]
  },
  "scope": "ASSIGNEE",
  "requireHeaders" : true,
  "after": "djE6OQ=="
}
```

**Properties**

Name	Type	Description	Required or Optional	Available Version
after	String	Pointer to the last record in the previous pagination request.	Optional	57.0
filters	<a href="#">Filter Input</a> []	List of WHERE clauses for filtering actionable list members.	Optional	57.0

Name	Type	Description	Required or Optional	Available Version
orderBy	<a href="#">OrderBy Input[]</a>	ORDER BY clause for sorting actionable list members.   <b>Note:</b> Sorting of polymorphic columns of actionable list members isn't supported.	Optional	57.0
requiresHeaders	Boolean	Indicates whether the metadata of the Actionable List Member fields must be provided ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>true</code> .	Optional	57.0
scope	String	Specifies the scope of the API request: <ul style="list-style-type: none"> <li>• <b>Assignee</b>—API fetches the actionable list members assigned to the logged in user.</li> <li>• <b>All</b>—API fetches all the actionable list members shared with or belonging to the logged in user.</li> </ul> The default value is <code>All</code> .	Optional	57.0
searchTerm	String	Reference record name for filtering actionable list member records.	Optional	57.0

**Response Body for POST**[Search Actionable List Members](#)**Actionable List Member Search by Using Filter Criteria**

Get a list of actionable list members by using filter criteria.

**Resource**`/connect/sales-excellence/actionable-list-members`

**Resource Example**

```
https://yourInstance.salesforce.com/services/data/v63.0/connect/sales-excellence/actionable-list-members
```

**Available Version**

57.0

**Requires Chatter**

No

**HTTP Methods**


POST

**Request Body for POST****JSON Example**

```
{
  "searchTerm" : "Julia Green",
  "orderBy" : {
    "orderByList" : [
      {
        "fieldName" : "Name",
        "operator" : "ASC",
        "nulls" : "First"
      }
    ]
  },
  "filters" : {
    "filterList" : [
      {
        "fieldName" : "Name",
        "operator" : "Like",
        "value" : "AL"
      }
    ]
  },
  "scope": "ASSIGNEE",
  "requireHeaders" : true,
  "after": "djE6OQ=="
}
```

**Properties**

Name	Type	Description	Required or Optional	Available Version
after	String	Pointer to the last record in the previous pagination request.	Optional	57.0
filters	<a href="#">Filter Input</a> []	List of WHERE clauses for filtering actionable list members.	Optional	57.0

Name	Type	Description	Required or Optional	Available Version
orderBy	<a href="#">OrderBy Input[]</a>	ORDER BY clause for sorting actionable list members.   <b>Note:</b> Sorting of polymorphic columns of actionable list members isn't supported.	Optional	57.0
requiresHeaders	Boolean	Indicates whether the metadata of the Actionable List Member fields must be provided ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>true</code> .	Optional	57.0
scope	String	Specifies the scope of the API request: <ul style="list-style-type: none"><li>• <code>Assignee</code>—API fetches the actionable list members assigned to the logged in user.</li><li>• <code>All</code>—API fetches all the actionable list members shared with or belonging to the logged in user.</li></ul> The default value is <code>All</code> .	Optional	57.0
searchTerm	String	Reference record name for filtering actionable list member records.	Optional	57.0

**Response Body for POST**[Search Actionable List Members](#)

## Actionable List Members API Requests

Here's the list of the Actionable List Members API request bodies.

[Actionable List Fields Input](#)

Input representation for updating an actionable list record.

[Actionable List Member Fields Input](#)

Input representation for updating an actionable list member record.

[Actionable List Update Member Count Input](#)

Actionable List Member Count input.

[Actionable List Update Member Count Filter Input](#)

Actionable List Member Count input for one filter.

[Actionable List Update Member Count Filter List Input](#)

Actionable List Member Count input for filters.

[Assign Actionable List Input](#)

Input representation for assigning an actionable list.

[Assignee Input](#)

Input representation for updating the assignee details of an actionable list member.

[Auto Assignee Input](#)

Input representation for updating Auto Assignee.

[Filter Input](#)

Input representation for a filter query to fetch actionable list members.

[OrderBy Input](#)

Input representation of the orderBy clause to sort actionable list members.

[Search Actionable List Member Input](#)

Input representation for searching for actionable list members.

## Actionable List Fields Input

Input representation for updating an actionable list record.

### JSON Example

```
{
  "actionableListFields": {
    "priority": "medium",
    "omniScriptKey": "type/subtype/English",
    "sortField": "Phone",
    "sortOrder": "Ascending",
    "isAutoAssignmentAllowed": true
  }
}
```

### Properties

Name	Type	Description	Required or Optional	Available Version
omniScriptKey	String	OmniScript key for associating an OmniScript with the actionable list. The format of the OmniScript key is: CheckType/CheckSubType/Language.	Optional	57.0

Name	Type	Description	Required or Optional	Available Version
priority	String	Priority assigned to the actionable list: <ul style="list-style-type: none"> <li>• High</li> <li>• Medium</li> <li>• Low</li> </ul>	Required	57.0
sortField	String	The criteria in which the actionable list is sorted.	Optional	58.0
sortOrder	String	The sequence in which actionable lists should be displayed ( <i>ascending</i> , <i>descending</i> ).	Optional	58.0
isAutoAssignAllowed	Boolean	Indicates whether automatic assignment of new actionable list members is allowed ( <i>true</i> ) or not ( <i>false</i> ).	Optional	59.0

## Actionable List Member Fields Input

Input representation for updating an actionable list member record.

### JSON Example

```
{
  "actionableListMemberFields": {
    "assignee": {
      "type": "RecordOwner",
      "name": ""
    }
  }
}
```

### Properties

Name	Type	Description	Required or Optional	Available Version
assignee	<a href="#">Assignee Input</a>	Assignee of an actionable list member	Required	57.0

## Actionable List Update Member Count Input

Actionable List Member Count input.

### JSON example

```
{
  "filters": {
    "conditions": [
      {
        "fieldName": "ObjectName",
        "operator": "equals",

```

```
{
  "value": "Account",
  "index": 1
},
{
  "fieldName": "Name",
  "operator": "equals",
  "value": "VIPClients",
  "index": 2
}
],
"filterLogic": "1 AND 2",
"querySize": 2000
}
```

### Properties

Specify either an `actionableListId` or `filters`, but not both.

Name	Type	Description	Required or Optional	Available Version
<code>actionableListId</code>	String	ID of the actionable list to be updated.	Required if no <code>filters</code>	59.0
<code>filters</code>	<a href="#">Actionable List Update Member Count Filter List Input[]</a>	List of filters to identify the actionable lists to be updated.	Required if no <code>actionableListId</code>	59.0

## Actionable List Update Member Count Filter Input

Actionable List Member Count input for one filter.

### JSON example

```
{
  "fieldName": "ObjectName",
  "operator": "equals",
  "value": "Account",
  "index": 1
}
```

### Properties

Name	Type	Description	Required or Optional	Available Version
<code>fieldName</code>	String	API Name of the field used in the filter.	Required if <code>filters</code> is specified	59.0
<code>index</code>	String	Integer that represents this filter in the <code>filterLogic</code> .	Required if <code>filters</code> is specified	59.0

Name	Type	Description	Required or Optional	Available Version
operator	String	The operator used in the filter. Valid values are: <ul style="list-style-type: none"><li>• Equals</li><li>• Not equals</li><li>• Less than</li><li>• Less or equal</li><li>• Greater than</li><li>• Greater or equal</li><li>• Like</li></ul>	Required if filters is specified	59.0
value	String	Value of the field used in the filter.	Required if filters is specified	59.0

## Actionable List Update Member Count Filter List Input

Actionable List Member Count input for filters.

### JSON example

```
{
  "conditions": [
    {
      "fieldName": "ObjectName",
      "operator": "equals",
      "value": "Account",
      "index": 1
    },
    {
      "fieldName": "Name",
      "operator": "equals",
      "value": "VIPClients",
      "index": 2
    }
  ],
  "filterLogic": "1 AND 2",
  "querySize": 2000
}
```

### Properties

Name	Type	Description	Required or Optional	Available Version
conditions	<a href="#">Actionable List Update Member Count Filter Input[]</a>	List criteria in the form fieldName, operator, value, with an index to identify the filter in the filterLogic.	Required if filters is specified	59.0

Name	Type	Description	Required or Optional	Available Version
filterLogic	String	Filter indexes with AND and OR logic to determine the overall outcome.	Required if filters is specified	59.0
querySize	Integer	Number of records to be returned, between 200 and 2000. The default is 2000.	Optional	59.0

## Assign Actionable List Input

Input representation for assigning an actionable list.

### JSON Example

```
{
  "actionableListFields": {
    "priority": "medium",
    "omniScriptKey": "type/subtype/English",
    "sortField": "Phone",
    "sortOrder": "Ascending",
    "isAutoAssignmentAllowed": true
  },
  "actionableListMemberFields": {
    "assignee": {
      "type": "User",
      "name": "User1"
    }
  },
  "autoAssignee": {
    "type": "RecordOwner",
    "name": "RecordOwnerName"
  }
}
```

### Properties

Name	Type	Description	Required or Optional	Available Version
actionableListFields	<a href="#">Actionable List Fields Input</a>	Details of the Actionable List fields	Required	57.0
actionableListMemberFields	<a href="#">Actionable List Member Fields Input</a>	Details of the Actionable List Member fields	Required	57.0
autoAssignee	<a href="#">Auto Assignee Input</a>	Details of the assignees to whom the new members in an actionable list are automatically assigned.	Optional	59.0

## Assignee Input

Input representation for updating the assignee details of an actionable list member.

### JSON Example

```
{
  "assignee": {
    "type": "RecordOwner",
    "name": ""
  }
}
```

### Properties

Name	Type	Description	Required or Optional	Available Version
name	String	Owner ID of the assignee of an actionable list member.	Required	57.0
type	String	Type of the assignee. The assignee can be either a user or the owner of the record.	Required	57.0

## Auto Assignee Input

Input representation for updating Auto Assignee.

### JSON example

```
{
  "type": "RecordOwner",
  "name": "RecordOwnerName"
}
```

### Properties

Name	Type	Description	Required or Optional	Available Version
name	String	The name of assignee to which the new members in an actionable list are automatically assigned. In the case where the <code>type</code> is user, the <code>userId</code> must be passed in this attribute.	Optional	59.0
type	String	The type of assignee to which the new members in an actionable list are automatically assigned.	Optional	59.0

## Filter Input

Input representation for a filter query to fetch actionable list members.

### JSON Example

```
{
  "filters" : {
    "filterList" : [
      {
        "fieldName" : "Name",
        "operator" : "Like",
        "value" : "AL"
      }
    ]
  }
}
```

### Properties

Name	Type	Description	Required or Optional	Available Version
fieldName	String	Name of the field used for filtering actionable list members. Specify the field name in relation to its parent, such as <code>Actionablelist.Name</code>	Required	57.0
operator	String	Operator used for filtering: <ul style="list-style-type: none"><li>• Equals</li><li>• Like</li><li>• NotEquals</li></ul>	Required	57.0
value	String	Value for filtering actionable list members	Required	57.0

### OrderBy Input

Input representation of the orderBy clause to sort actionable list members.

### JSON Example

```
{
  "orderBy" : {
    "orderByList" : [
      {
        "fieldName" : "Name",
        "operator" : "ASC",
        "nulls" : "First"
      }
    ]
  }
}
```

### Properties

Name	Type	Description	Required or Optional	Available Version
fieldName	String	Name of the field used for sorting actionable list members	Required	57.0
nulls	String	Specifies where to show the fields with a null value-at the top or bottom of the sorted list	Optional	57.0
operator	String	Specifies the sorting order: <ul style="list-style-type: none"><li>• ASC</li><li>• DESC</li></ul>	Required	57.0


### Search Actionable List Member Input

Input representation for searching for actionable list members.

#### JSON Example

```
{
  "searchTerm" : "Julia Green",
  "orderBy" : {
    "orderByList" : [
      {
        "fieldName" : "Name",
        "operator" : "ASC",
        "nulls" : "First"
      }
    ]
  },
  "filters" : {
    "filterList" : [
      {
        "fieldName" : "Name",
        "operator" : "Like",
        "value" : "AL"
      }
    ]
  },
  "scope": "ASSIGNEE",
  "requireHeaders" : true,
  "after": "djE6OQ=="
}
```

## Properties

Name	Type	Description	Required or Optional	Available Version
after	String	Pointer to the last record in the previous pagination request.	Optional	57.0
filters	<a href="#">Filter Input[]</a>	List of WHERE clauses for filtering actionable list members.	Optional	57.0
orderBy	<a href="#">OrderBy Input[]</a>	ORDER BY clause for sorting actionable list members.   <b>Note:</b> Sorting of polymorphic columns of actionable list members isn't supported.	Optional	57.0
<del>requiresFields</del>	Boolean	Indicates whether the metadata of the Actionable List Member fields must be provided ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>true</code> .	Optional	57.0
scope	String	Specifies the scope of the API request: <ul style="list-style-type: none"> <li>• <b>Assignee</b>—API fetches the actionable list members assigned to the logged in user.</li> <li>• <b>All</b>—API fetches all the actionable list members shared with or belonging to the logged in user.</li> </ul> The default value is <b>All</b> .	Optional	57.0
searchTerm	String	Reference record name for filtering actionable list member records.	Optional	57.0

# Actionable List Members API Responses

Here's the list of the Actionable List Members API response bodies.

[Assign Actionable List](#)

Output representation of the actionable list assignment request.

[Actionable List Member Queue](#)

Output representation of the actionable list member queue details.

[Actionable List Member Queues](#)

Output representation of the fetch request of the queues that contain the actionable list member as a supported object.

[Actionable List Update Member Count Output](#)

Actionable List Member Count output.

[Field](#)

A field's metadata.

[Field Value](#)

The raw and displayable field values for a field in a record.

[Sales Excellence Status](#)

Output representation to show the status of the assignment API request.

[Search Actionable List Members](#)

Output representation of the request for searching for actionable list members.

[Record](#)

The field data, API name, child relationship data, and record type information for a record.

## Assign Actionable List

Output representation of the actionable list assignment request.

**JSON Example**

```
{
  "actionableListId": "0120000000000000AAA",
  "status": {
    "code": 200,
    "message": "The actionable list is assigned successfully."
  }
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
actionableListId	String	ID of the actionable list record	Small, 57.0	57.0
status	<a href="#">Sales Excellence Status</a>	Status of the API request	Small, 57.0	57.0

## Actionable List Member Queue

Output representation of the actionable list member queue details.

### JSON Example

```
{
  "queues": [
    {
      "name": "Queue1",
      "id": "1sgxx0000000001AAA"
    },
    {
      "name": "Queue2",
      "id": "1sgxx0000000001BAA"
    }
  ]
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
id	String	Queue ID associated with actionable list member object.	Small, 59.0	59.0
name	String	Queue name associated with actionable list member object.	Small, 59.0	59.0

## Actionable List Member Queues

Output representation of the fetch request of the queues that contain the actionable list member as a supported object.

### JSON Example

```
{
  "queues": [
    {
      "name": "Queue1",
      "id": "1sgxx0000000001AAA"
    },
    {
      "name": "Queue2",
      "id": "1sgxx0000000001BAA"
    }
  ],
  "nextPageCursor": "0xxdr45",
  "status": {
    "code": 200,
    "message": "Fetched all Queues"
  }
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
nextPageCursor	String	Next page cursor of filtered actionable list member supporting queues.	Small, 59.0	59.0
queues	<a href="#">Actionable List Member Queue[]</a>	List of actionable lists assigned to the querying user.	Small, 59.0	59.0


## Actionable List Update Member Count Output

Actionable List Member Count output.

Property Name	Type	Description	Filter Group and Version	Available Version
jobID	String	ID of the bulk data load job that performs the update. Used only for <code>filters</code> input.	Small, 59.0	59.0
message	String	Message explaining why the request failed, if it did.	Small, 59.0	59.0

## Field

A field's metadata.

 **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. Because changing the often-used term master-detail can break customer implementations, we maintained this reference.

Property Name	Type	Description	Filter Group and Version	Available Version
apiName	String	The API name for this field.	Small, 41.0	41.0
calculated	Boolean	Indicates whether the field is a custom formula field.	Small, 41.0	41.0
compound	Boolean	Indicates whether the field is a top-level compound field.  If the <code>dataType</code> is <code>Location</code> , this value is usually <code>false</code> .	Small, 41.0	41.0
compoundComponentName	String	If this field is a component field of a compound field, the value is the normalized component name, otherwise the value is <code>null</code> . For example, if the field represents <code>"BillingStreet"</code> of an <code>Address</code> compound field, this property contains <code>"Street"</code> .	Small, 41.0	41.0

Property Name	Type	Description	Filter Group and Version	Available Version
compoundFieldName	String	If this field is a component field of a compound field, this property contains the top-level compound field. Otherwise, the value of this property is <code>null</code> .	Small, 41.0	41.0
controllerName	String	If this field is a dependent picklist, this property is the name of the field that controls the values of the picklist.	Small, 41.0	41.0
controllingFields	String[]	If this field is a dependent picklist, this property is a collection of fields that control the values in the picklist. When there's a hierarchy of controlling fields, the collection starts with the immediate parent and moves up the tree.		
createable	Boolean	Indicates whether the field can be created.	Small, 41.0	41.0
custom	Boolean	Indicates whether the field is custom.	Small, 41.0	41.0
dataType	String	Field type. One of these values: <ul style="list-style-type: none"> <li>• Address</li> <li>• Anytype</li> <li>• Base64</li> <li>• Boolean</li> <li>• ComboBox</li> <li>• ComplexValue—ComplexValue Type (CVT).</li> <li>• Currency</li> <li>• Date</li> <li>• DateTime</li> <li>• Double</li> <li>• Email</li> <li>• EncryptedString</li> <li>• Int</li> <li>• JunctionIdList</li> <li>• Location</li> <li>• Long</li> <li>• MultiPicklist—To populate the multi-select picklist, Get Values for a Picklist Field or Get Values for All Picklist Fields of a Record Type.</li> <li>• Percent</li> </ul>	Small, 41.0	41.0

Property Name	Type	Description	Filter Group and Version	Available Version
		<ul style="list-style-type: none"> <li>• Phone</li> <li>• Picklist—To populate the picklist, Get Values for a Picklist Field or Get Values for All Picklist Fields of a Record Type.</li> <li>• Reference</li> <li>• String</li> <li>• TextArea</li> <li>• Time</li> <li>• Url</li> </ul>		
externalId	String	External ID of the field.	Small, 60.0	60.0
extraTypeInfo	String	<p>More data type information. One of these values:</p> <ul style="list-style-type: none"> <li>• ExternalLookup—External lookup</li> <li>• ImageUrl—Image url</li> <li>• IndirectLookup—Indirect lookup</li> <li>• PersonName—Person name</li> <li>• PlainTextArea—Plain text area</li> <li>• RichTextArea—Rich text area</li> <li>• SwitchablePersonName—Switchable person name</li> </ul>	Small, 41.0	41.0
filterable	Boolean	Indicates whether the field is filterable. If <code>true</code> , then this field can be specified in the <code>WHERE</code> clause of a SOQL statement.	Small, 41.0	41.0
filteredLookupInfo	Filtered Lookup Info	If the field is a reference field type with a lookup filter, this value contains the lookup information.	Small, 41.0	41.0
highScaleNumber	Boolean	Indicates whether the field stores numbers to 8 decimal places regardless of what's specified in the field details.	Small, 41.0	41.0
htmlFormatted	Boolean	Indicates whether the field has been formatted for HTML and should be encoded for display in HTML. Also indicates whether a field is a custom	Small, 41.0	41.0

Property Name	Type	Description	Filter Group and Version	Available Version
		formula field that has an IMAGE text function.		
inlineHelpText	String	The text that displays in the field-level help hover text.	Medium, 41.0	41.0
label	String	Text label that is displayed next to the field in the Salesforce user interface. This label may be localized.	Small, 41.0	41.0
length	Integer	For string fields, the maximum size of the field in number of Unicode characters (not bytes).	Small, 41.0	41.0
maskType	String	Mask type of the field.	Small, 60.0	60.0
nameField	Boolean	Indicates whether the field is a name field.	Small, 41.0	41.0
polymorphicForeignKey	Boolean	Indicates whether the field is a foreign key over a domain of multiple objects.	Small, 41.0	41.0
precision	Integer	For double fields, indicates the maximum number of digits that can be stored, on both sides of the decimal point.	Small, 41.0	41.0
reference	Boolean	Indicates whether the field is a foreign key to another record.  A reference field contains an Id value that points to a unique record (usually the parent record) on another object.	Small, 41.0	41.0
referenceTargetField	String	For indirect lookup relationships on external objects, this property is the target custom field of the referenced object.	Medium, 41.0	41.0
referenceToInfos	Reference to Info[]	For fields that refer to other objects, this list includes information about the object types and name fields of the referenced objects.	Small, 41.0	41.0
relationshipName	String	The name of the relationship, if this relationship is a master-detail relationship field.	Small, 41.0	41.0
required	Boolean	Indicates whether the field is required when creating or editing a record.  To determine which fields are required in a layout, use the	Small, 41.0	41.0

Property Name	Type	Description	Filter Group and Version	Available Version
		<code>RecordLayoutItem.required</code> property.		
<code>scale</code>	Integer	For double fields, indicates the number of digits to the right of the decimal point.	Small, 41.0	41.0
<code>searchPrefilterable</code>	Boolean	Indicates whether a foreign key (relationship field) can be included in a SOSL <code>WHERE</code> clause.	Big, 41.0	41.0
<code>sortable</code>	Boolean	Indicates whether the field is sortable. If <code>true</code> , then this field can be specified in a SOQL <code>ORDER BY</code> clause.	Small, 41.0	41.0
<code>unique</code>	Boolean	Indicates whether a field's value must be unique.	Small, 41.0	41.0
<code>updateable</code>	Boolean	Indicates whether the field can be edited.	Small, 41.0	41.0

## Field Value

The raw and displayable field values for a field in a record.

Property Name	Type	Description	Filter Group and Version	Available Version
<code>displayValue</code>	String	<p>The displayable value for a field.</p> <p>This field is non-null in these cases.</p> <ul style="list-style-type: none"> <li>The <code>value</code> property can be localized to the context user's language.</li> <li>The <code>value</code> property is a date or currency that can be formatted for display.</li> </ul> <p>If the <code>dataType</code> on page 130 of a field is <code>Date</code> or <code>DateTime</code>, it uses the short format in this <a href="#">table</a>.</p> <p>If the <code>dataType</code> of a field is <code>Currency</code>, it uses the format in this <a href="#">table</a>.</p> <ul style="list-style-type: none"> <li>The <code>value</code> property is a related record.</li> </ul>	Small, 41.0	41.0
<code>value</code>	Object	<p>The value of a field in its raw data form.</p> <p>If the field is a related record, the raw value contains a nested <a href="#">Record</a> response body.</p>	Small, 41.0	41.0

Property Name	Type	Description	Filter Group and Version	Available Version
		If this value is <code>null</code> , the <code>displayValue</code> is also <code>null</code> .  Date and time information is in ISO 8601 format.		

## Sales Excellence Status

Output representation to show the status of the assignment API request.

### JSON Example

```
{
  "status": {
    "code": 200,
    "message": "The actionable list is assigned successfully."
  }
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
code	Integer	Response status code	Small, 57.0	57.0
message	String	Message of the response status code	Small, 57.0	57.0

## Search Actionable List Members

Output representation of the request for searching for actionable list members.

### JSON Example

```
{
  "fields": [
    {
      "apiName": "ActionableListMemberStatusId",
      "calculated": false,
      "compound": false,
      "compoundComponentName": null,
      "compoundFieldName": null,
      "controllerName": null,
      "controllingFields": [],
      "createable": true,
      "custom": false,
      "dataType": "Reference",
      "extraTypeInfo": null,
      "filterable": true,
      "filteredLookupInfo": null,
      "highScaleNumber": false,
      "htmlFormatted": false,
      "inlineHelpText": null,

```

```

    "label": "Actionable List Member Status",
    "length": 18,
    "nameField": false,
    "polymorphicForeignKey": false,
    "precision": 0,
    "reference": true,
    "referenceTargetField": null,
    "referenceToInfos": [
      {
        "apiName": "ActionableListMemberStatus",
        "nameFields": []
      }
    ],
    "relationshipName": "ActionableListMemberStatus",
    "required": false,
    "scale": 0,
    "searchPrefilterable": false,
    "sortable": true,
    "unique": false,
    "updateable": true
  },
  {
    "apiName": "ReferenceRecordId",
    "calculated": false,
    "compound": false,
    "compoundComponentName": null,
    "compoundFieldName": null,
    "controllerName": null,
    "controllingFields": [],
    "createable": true,
    "custom": false,
    "dataType": "Reference",
    "extraTypeInfo": null,
    "filterable": true,
    "filteredLookupInfo": null,
    "highScaleNumber": false,
    "htmlFormatted": false,
    "inlineHelpText": null,
    "label": "Reference Record",
    "length": 18,
    "nameField": false,
    "polymorphicForeignKey": true,
    "precision": 0,
    "reference": true,
    "referenceTargetField": null,
    "referenceToInfos": [
      {
        "apiName": "Account",
        "nameFields": [
          "Name"
        ]
      }
    ],
  },
  {
    "apiName": "Contact",

```

```

        "nameFields": [
            "FirstName",
            "LastName",
            "Name"
        ]
    },
    ],
    "relationshipName": "ReferenceRecord",
    "required": true,
    "scale": 0,
    "searchPrefilterable": false,
    "sortable": true,
    "unique": false,
    "updateable": true
},
{
    "apiName": "OwnerId",
    "calculated": false,
    "compound": false,
    "compoundComponentName": null,
    "compoundFieldName": null,
    "controllerName": null,
    "controllingFields": [],
    "createable": true,
    "custom": false,
    "dataType": "Reference",
    "extraTypeInfo": null,
    "filterable": true,
    "filteredLookupInfo": null,
    "highScaleNumber": false,
    "htmlFormatted": false,
    "inlineHelpText": null,
    "label": "Assignee",
    "length": 18,
    "nameField": false,
    "polymorphicForeignKey": true,
    "precision": 0,
    "reference": true,
    "referenceTargetField": null,
    "referenceToInfos": [
        {
            "apiName": "Group",
            "nameFields": [
                "Name"
            ]
        },
    ],
    {
        "apiName": "User",
        "nameFields": [
            "FirstName",
            "LastName",
            "Name"
        ]
    }
}

```

```

    ],
    "relationshipName": "Owner",
    "required": true,
    "scale": 0,
    "searchPrefilterable": false,
    "sortable": true,
    "unique": false,
    "updateable": true
  },
  {
    "apiName": "ActionableListId",
    "calculated": false,
    "compound": false,
    "compoundComponentName": null,
    "compoundFieldName": null,
    "controllerName": null,
    "controllingFields": [],
    "createable": true,
    "custom": false,
    "dataType": "Reference",
    "extraTypeInfo": null,
    "filterable": true,
    "filteredLookupInfo": null,
    "highScaleNumber": false,
    "htmlFormatted": false,
    "inlineHelpText": null,
    "label": "Actionable List",
    "length": 18,
    "nameField": false,
    "polymorphicForeignKey": false,
    "precision": 0,
    "reference": true,
    "referenceTargetField": null,
    "referenceToInfos": [
      {
        "apiName": "ActionableList",
        "nameFields": [
          "Name"
        ]
      }
    ],
    "relationshipName": "ActionableList",
    "required": true,
    "scale": 0,
    "searchPrefilterable": false,
    "sortable": true,
    "unique": false,
    "updateable": false
  },
  {
    "apiName": "Name",
    "calculated": false,
    "compound": false,
    "compoundComponentName": null,

```

```

    "compoundFieldName": null,
    "controllerName": null,
    "controllingFields": [],
    "createable": false,
    "custom": false,
    "dataType": "String",
    "extraTypeInfo": null,
    "filterable": true,
    "filteredLookupInfo": null,
    "highScaleNumber": false,
    "htmlFormatted": false,
    "inlineHelpText": null,
    "label": "Name",
    "length": 255,
    "nameField": true,
    "polymorphicForeignKey": false,
    "precision": 0,
    "reference": false,
    "referenceTargetField": null,
    "referenceToInfos": [],
    "relationshipName": null,
    "required": true,
    "scale": 0,
    "searchPrefilterable": false,
    "sortable": true,
    "unique": false,
    "updateable": false
  }
],
"nextPageToken": "djE6MTk=",
"records": [
  {
    "apiName": "ActionableListMember",
    "childRelationships": {},
    "eTag": "6c4f106b488feff2ecb64758daf202f7",
    "fields": {
      "Owner": {
        "displayValue": null,
        "value": {
          "apiName": "Owner",
          "childRelationships": {},
          "eTag": "389e6df77a824032aaf4d6d57099b916",
          "fields": {
            "Id": {
              "displayValue": null,
              "value": "005xx000001X7sHAAS"
            },
            "Name": {
              "displayValue": null,
              "value": "Admin User"
            }
          }
        },
        "id": "005xx000001X7sHAAS",
        "lastModifiedById": null,

```

```

        "lastModifiedDate": null,
        "recordTypeId": null,
        "recordTypeInfo": null,
        "systemModstamp": null,
        "weakEtag": 0
    },
    "ActionableList": {
        "displayValue": null,
        "value": {
            "apiName": "ActionableList",
            "childRelationships": {},
            "eTag": "63439e779f0ceda0e6978c5f22162431",
            "fields": {
                "Priority": {
                    "displayValue": "High",
                    "value": "High"
                },
                "Id": {
                    "displayValue": null,
                    "value": "0woxx000000028IAAQ"
                },
                "Name": {
                    "displayValue": null,
                    "value": "Homeloans"
                },
                "ActionableListDefinitionId": {
                    "displayValue": null,
                    "value": null
                }
            },
            "id": "0woxx000000028IAAQ",
            "lastModifiedById": null,
            "lastModifiedDate": null,
            "recordTypeId": null,
            "recordTypeInfo": null,
            "systemModstamp": null,
            "weakEtag": 0
        }
    },
    "Id": {
        "displayValue": null,
        "value": "0wzxx00000002TjAAI"
    },
    "ReferenceRecord": {
        "displayValue": null,
        "value": {
            "apiName": "ReferenceRecord",
            "childRelationships": {},
            "eTag": "9df10988eff0de6a66136922d75f3643",
            "fields": {
                "Id": {
                    "displayValue": null,
                    "value": "001xx000003GbvDAAS"
                }
            }
        }
    }
}

```

```

    },
    "Name": {
      "displayValue": null,
      "value": "jaxon Frost"
    }
  },
  "id": "001xx000003GbvDAAS",
  "lastModifiedById": null,
  "lastModifiedDate": null,
  "recordTypeId": null,
  "recordTypeInfo": null,
  "systemModstamp": null,
  "weakEtag": 0
}
},
"Name": {
  "displayValue": null,
  "value": "ALM-00000441"
}
},
"Id": "0wzxx00000002TjAAI",
"lastModifiedById": null,
"lastModifiedDate": null,
"recordTypeId": null,
"recordTypeInfo": null,
"systemModstamp": null,
"weakEtag": 0
}
]
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
fields	<a href="#">Field[]</a>	List of metadata of the Actionable List Member fields	Small, 57.0	57.0
nextPageToken	String	Pointer to the last record in the current pagination request	Small, 57.0	57.0
records	<a href="#">Record[]</a>	List of queried actionable list member records	Small, 57.0	57.0

## Record

The field data, API name, child relationship data, and record type information for a record.

Property Name	Type	Description	Filter Group and Version	Available Version
apiName	String	The API name for this record.	Small, 41.0	41.0

Property Name	Type	Description	Filter Group and Version	Available Version
childRelationships	Map<String, Record Collection>	The child relationship data for this record.	Small, 41.0	41.0
fields	Map<String, <a href="#">Field Value</a> >	The field data for this record, matching the requested layout and mode.	Small, 41.0	41.0
id	String	The ID of this record.	Small, 41.0	41.0
lastModifiedById	String	The ID of the user who last updated this record.	Small, 44.0	44.0
lastModifiedDate	String	The date and time when a user last modified this record. Date and time information is in ISO 8601 format.	Small, 44.0	44.0
recordTypeId	String	The record type ID for this record.	Small, 48.0	48.0
recordTypeInfo	Record Type Info	The record type info for this record, if any.  This property is returned for only two levels of nested records. Instead, use <code>recordTypeId</code> , which is returned for every record in a response.	Small, 41.0	41.0
systemModstamp	String	The date and time when a user or an automated process (such as a trigger) last modified this record. Date and time information is in ISO 8601 format.	Small, 44.0	44.0

## Actionable List Members Key Performance Indicator Bar Objects

Use the objects in Key Performance Indicator (KPI) Bar to create custom key performance indicators and map the indicators to actionable lists.

### [ActnblListKeyPrfmIndAsgnt](#)

Represents the key performance indicators (KPIs) that are shown on KPI Bar. This object is available in API version 60.0 and later.

### [ActnblListKeyPrfmIndDef](#)

Represents the custom key performance indicators that are defined for a specific field in an object. This object is available in API version 60.0 and later.

## ActnblListKeyPrfmIndAsgnt

Represents the key performance indicators (KPIs) that are shown on KPI Bar. This object is available in API version 60.0 and later.

## Supported Calls

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

## Special Access Rules

Access to this object requires the Industries Sales Excellence add-on license.


## Fields

Field	Details
ActionableListId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> The ID of the actionable list for which the key performance indicators are defined. This field is a relationship field.</p> <p><b>Relationship Name</b> ActionableList</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> ActionableList</p>
ActionableListMemberStatusId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The status key performance indicator (KPI) that is shown on KPI Bar. This field is a relationship field.</p> <p><b>Relationship Name</b> ActionableListMemberStatus</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> ActionableListMemberStatus</p>
ActnblListKeyPrfmIndDefId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The key performance indicator (KPI) record that the list creator selects to show on KPI Bar. This field is a relationship field.</p>

Field	Details
	<b>Relationship Name</b> ActnblListKeyPrfmIndDef <b>Relationship Type</b> Lookup <b>Refers To</b> ActnblListKeyPrfmIndDef
DisplayOrder	<b>Type</b> int <b>Properties</b> Create, Filter, Group, Sort, Update <b>Description</b> The display order of the key performance indicator (KPI) that is shown on KPI Bar.
Name	<b>Type</b> string <b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort <b>Description</b> For internal use only

## ActnblListKeyPrfmIndDef

Represents the custom key performance indicators that are defined for a specific field in an object. 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()`, `describeObjects()`, `query()`, `retrieve()`, `update()`, `upsert()`

## Special Access Rules

Access to this object requires the Industries Sales Excellence add-on license.

## Fields

Field	Details
AggregateOperationName	<b>Type</b> picklist

Field	Details
	<p><b>Properties</b> Create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> The name of the aggregate operation associated with the custom key performance indicator. Possible values are:</p> <ul style="list-style-type: none"> <li>• Average</li> <li>• Count</li> <li>• Max</li> <li>• Min</li> <li>• Sum</li> </ul>
Description	<p><b>Type</b> textarea</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The description of the custom key performance indicator.</p>
DeveloperName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The developer name of the actionable list key performance indicator definition.</p> <p> <b>Note:</b> Only users with View DeveloperName OR View Setup and Configuration permission can view, group, sort, and filter this field.</p>
FieldName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The field on which the operation associated with the custom key performance indicator is performed.</p>
FilterExpression	<p><b>Type</b> textarea</p> <p><b>Properties</b> Create, Nillable, Update</p>

Field	Details
	<b>Description</b> The filters associated with the field on which the operation is performed.
Language	<b>Type</b> picklist <b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update <b>Description</b> Language of the actionable list key performance indicator definition. Possible values are: <ul style="list-style-type: none"> <li>• da—Danish</li> <li>• de—German</li> <li>• en_US—English</li> <li>• es—Spanish</li> <li>• es_MX—Spanish (Mexico)</li> <li>• fi—Finnish</li> <li>• fr—French</li> <li>• it—Italian</li> <li>• ja—Japanese</li> <li>• ko—Korean</li> <li>• nl_NL—Dutch</li> <li>• no—Norwegian</li> <li>• pt_BR—Portuguese (Brazil)</li> <li>• ru—Russian</li> <li>• sv—Swedish</li> <li>• th—Thai</li> <li>• zh_CN—Chinese (Simplified)</li> <li>• zh_TW—Chinese (Traditional)</li> </ul>
MasterLabel	<b>Type</b> string <b>Properties</b> Create, Filter, Group, Sort, Update <b>Description</b> Required. Controlling label for this actionable list key performance indicator definition.
NamespacePrefix	<b>Type</b> string <b>Properties</b> Filter, Group, Nillable, Sort

Field	Details
	<p><b>Description</b></p> <p>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 <b><code>namespacePrefix__componentName</code></b> notation.</p> <p>The namespace prefix can have one of the following values.</p> <ul style="list-style-type: none"> <li>• In Developer Edition orgs, <code>NamespacePrefix</code> 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.</li> <li>• In orgs that aren't Developer Edition orgs, <code>NamespacePrefix</code> is set only for objects that are part of an installed managed package. All other objects have no namespace prefix.</li> </ul>
ObjectName	<p><b>Type</b></p> <p>picklist</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b></p> <p>The object associated with the custom key performance indicator.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• Account</li> <li>• ActionableListMember—Actionable List Member</li> <li>• Asset</li> <li>• Case</li> <li>• Contact</li> <li>• HealthcareFacility—Healthcare Facility</li> <li>• Lead</li> <li>• Opportunity</li> <li>• MemberPlan</li> </ul>
Status	<p><b>Type</b></p> <p>picklist</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b></p> <p>Specifies the status of the custom key performance indicator.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• Active</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>Inactive</li> </ul>

## Actionable List Members Metadata Types

Use the Actionable List Members metadata types to set up Bulk Action Panel.

### [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
<code>channelConfigurations</code>	<a href="#">RecordActionDeploymentChannel</a>	Specifies configuration settings for different channels in an Actions & Recommendations deployment.
<code>componentName</code>	ComponentName (enumeration of type string)	Specifies the name of the component used in the deployment: <ul style="list-style-type: none"> <li><code>ActionsAndRecommendations—0</code></li> <li><code>ActionLauncher—1</code></li> </ul>

Field Name	Field Type	Description
		<ul style="list-style-type: none"> <li><code>BulkActionPanel</code>—2. This value is available in API version 60.0 and later</li> </ul> <p>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.</p>
<code>deploymentContexts</code>	<a href="#">RecordActionDeploymentContext</a>	Specifies the object context for quick actions and Next Best Action strategies. Available in API version 46.0 and later.
<code>hasComponents</code>	boolean	Indicates whether the record actions deployment includes components ( <code>true</code> ) or not ( <code>false</code> ). Available in API version 61.0 and later.
<code>hasGuidedActions</code>	boolean	Specifies that the component shows standard actions; for example, flows and quick actions. Available in API version 46.0 and later.
<code>hasOmniScripts</code>	boolean	Indicates whether the record actions deployment includes OmniScripts ( <code>true</code> ) or not ( <code>false</code> ). Available in API version 56.0 and later. The default value is <code>false</code> .
<code>hasRecommendations</code>	boolean	Specifies that the component shows recommendations from a Next Best Action strategy. Available in API version 46.0 and later.
<code>masterLabel</code>	string	Required. Specifies the name of the deployment.
<code>recommendation</code>	<a href="#">RecordActionRecommendation</a>	Specifies settings for how Next Best Action recommendations appear in the component. Available in API version 46.0 and later.
<code>selectableItems</code>	<a href="#">RecordActionDeploymentSelectableItems</a>	Specifies the actions that users can add at runtime.
<code>shouldLaunchActionOnReject</code>	boolean	Required. If <code>true</code> , 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
<code>action</code>	string	Required. Specifies the API name of an action. For example, the API name of a flow, such as <code>Verify_Information</code> .
<code>isMandatory</code>	boolean	Specifies whether the action is marked as mandatory. The default value is <code>false</code> .
<code>isUiRemoveHidden</code>	boolean	Specifies whether the remove option is hidden in the UI. The default value is <code>false</code> . If <code>true</code> , the UI hides the ability to remove the action from the list.
<code>pinned</code>	PinnedAction (enumeration of type string)	Required. Indicates whether the action is pinned to the <code>Top</code> or <code>Bottom</code> , or unpinned ( <code>None</code> ). The default value is <code>None</code> .

Field Name	Field Type	Description
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: <ul style="list-style-type: none"> <li>• Flow</li> <li>• QuickAction (Available in API version 46.0 and later.)</li> <li>• OmniScript (Available in API version 56.0 and later.)</li> <li>• LWC (Available in API version 62.0 and later.)</li> <li>• SvcCatalogItemDef (Available in API version 62.0 and later.)</li> <li>• WebLink (Available in API version 62.0 and later.)</li> </ul>

## 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	<a href="#">RecordActionDefaultItem</a>	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
<code>defaultStrategy</code>	string	Specifies the API name of the default Next Best Action strategy, which is a metadata type, <code>RecommendationStrategy</code> .
<code>hasDescription</code>	boolean	Required. If <code>true</code> , display the description for the recommendation.
<code>hasImage</code>	boolean	Required. If <code>true</code> , display the image for the recommendation.
<code>hasRejectAction</code>	boolean	Required. If <code>true</code> , display the label that the user clicks to reject the recommendation.
<code>hasTitle</code>	boolean	Required. If <code>true</code> , display the title for the recommendation.
<code>maxDisplayRecommendations</code>	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
<code>action</code>	string	Required. Specifies the API name of an action. For example, the API name of a flow, such as <code>Verify_Information</code> .
<code>type</code>	RecordActionType (enumeration of type string)	Required. The type of action that's associated with the record. Valid values are: <ul style="list-style-type: none"> <li>• <code>Flow</code></li> <li>• <code>QuickAction</code> (Available in API version 46.0 and later.)</li> <li>• <code>OmniScript</code> (Available in API version 56.0 and later.)</li> <li>• <code>LWC</code> (Available in API version 62.0 and later.)</li> <li>• <code>SvcCatalogItemDef</code> (Available in API version 62.0 and later.)</li> <li>• <code>WebLink</code> (Available in API version 62.0 and later.)</li> </ul>
<code>isFrequentAction</code>	boolean	Indicates whether an action is frequently accessed by users ( <code>true</code> ) or not ( <code>false</code> ). Available in version 57.0 and later.  This field applies only to Action Launcher.
<code>frequentActionSequenceNbr</code>	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>
```

```

    </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>

```

## Actionable List Members 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	<p><b>Type</b> mns:<a href="#">RecordActionDeploymentChannel</a></p> <p><b>Properties</b> Not applicable.</p> <p><b>Description</b> Channel default settings for the deployment. This field is visible only in the metadata for a record.</p>
ComponentName	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Specifies the name of the component used in the deployment. Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>ActionsAndRecommendations—0</code></li> <li>• <code>ActionLauncher—1</code></li> <li>• <code>BulkActionPanel—2</code>. This value is available in API version 60.0 and later.</li> </ul> <p>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.</p>
DeploymentContexts	<p><b>Type</b> mns:<a href="#">RecordActionDeploymentContext</a></p> <p><b>Properties</b> Not applicable.</p> <p><b>Description</b> Object context for the deployment. This field is visible only in the metadata for a record. Available in API version 46.0 and later.</p>
DeveloperName	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> 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.</p>

Field	Details
	 <b>Note:</b> Only users with View DeveloperName OR View Setup and Configuration permission can view, group, sort, and filter this field.
FullName	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> The unique name used as the record action deployment identifier for API access. The <code>fullName</code> 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.</p> <p>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.</p>
HasGuidedActions	<p><b>Type</b> boolean</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Sort</p> <p><b>Description</b> If <code>true</code>, indicates that the component shows standard actions; for example, flows and quick actions. Available in API version 46.0 and later.</p>
HasComponents	<p><b>Type</b> boolean</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Sort</p> <p><b>Description</b> Indicates whether the record actions deployment includes components (<code>true</code>) or not (<code>false</code>).</p>
HasOmniScripts	<p><b>Type</b> boolean</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Sort</p> <p><b>Description</b> Indicates whether the record actions deployment includes OmniScripts (<code>true</code>) or not (<code>false</code>). Available in API version 56.0 and later.</p> <p>The default value is <code>false</code>.</p>

Field	Details
HasRecommendations	<p><b>Type</b> boolean</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Sort</p> <p><b>Description</b> If <code>true</code>, indicates that the component shows recommendations from a Next Best Action strategy. Available in API version 46.0 and later.</p>
Language	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The language of the record action deployment. The following values are supported:</p> <ul style="list-style-type: none"> <li>Chinese (Simplified): <code>zh_CN</code></li> <li>Chinese (Traditional): <code>zh_TW</code></li> <li>Danish: <code>da</code></li> <li>Dutch: <code>nl_NL</code></li> <li>English: <code>en_US</code></li> <li>Finnish: <code>fi</code></li> <li>French: <code>fr</code></li> <li>German: <code>de</code></li> <li>Italian: <code>it</code></li> <li>Japanese: <code>ja</code></li> <li>Korean: <code>ko</code></li> <li>Norwegian: <code>no</code></li> <li>Portuguese (Brazil): <code>pt_BR</code></li> <li>Russian: <code>ru</code></li> <li>Spanish: <code>es</code></li> <li>Spanish (Mexico): <code>es_MX</code> Spanish (Mexico) defaults to Spanish for customer-defined translations.</li> <li>Swedish: <code>sv</code></li> <li>Thai: <code>th</code> The Salesforce user interface is fully translated to Thai, but Help is in English.</li> </ul>
ManageableState	<p><b>Type</b> ManageableState enumerated list</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Indicates the manageable state of the specified component that is contained in a package:</p>

Field	Details
	<ul style="list-style-type: none"> <li>• beta</li> <li>• deleted</li> <li>• deprecated</li> <li>• deprecatedEditable</li> <li>• installed</li> <li>• installedEditable</li> <li>• released</li> <li>• unmanaged</li> </ul>
MasterLabel	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> The name of the deployment.</p>
Metadata	<p><b>Type</b> mns:<a href="#">RecordActionDeployment</a></p> <p><b>Properties</b> Create, Nillable, Update</p> <p><b>Description</b> 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.</p>
NamespacePrefix	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> 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.</p>
Recommendation	<p><b>Type</b> mns:<a href="#">RecordActionRecommendation</a></p> <p><b>Properties</b> Not applicable.</p>

Field	Details
	<b>Description</b> 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	<b>Type</b> mns: <a href="#">RecordActionSelectableItem</a>  <b>Properties</b> Not applicable.  <b>Description</b> A subset of actions that users can launch at runtime. This field is visible only in the metadata for a record.

## Actionable Segmentation

The Actionable Segmentation data model helps segment similar client profiles and curate them to design timely and personalized client outreach programs. By using this data model, you can create actionable list definitions and actionable lists.

### [Actionable Segmentation Standard Objects](#)

This section lists the standard objects associated with Actionable Segmentation with their standard fields. Use the standard objects to create actionable lists, capture basic information such as reference record, member status, and column details for actionable list members.

### [Actionable Segmentation Custom Objects](#)

This section provides details on custom objects, including junction objects. The Junction Object is a custom object that enables you to link a custom object with a large number of child records and link each child record to a large number of parent objects.

### [Actionable Segmentation Metadata API Types](#)

Use the Actionable Segmentation metadata types to set up actionable list definitions. Create actionable list definitions, configure visible columns for actionable lists, and configure list member statuses before activating list definitions.

## Actionable Segmentation Standard Objects

This section lists the standard objects associated with Actionable Segmentation with their standard fields. Use the standard objects to create actionable lists, capture basic information such as reference record, member status, and column details for actionable list members.

### [ActionableList](#)

Represents an actionable list. This object is available in API version 57.0 and later.

### [ActionableListMember](#)

Represents an individual actionable list item. This object is available in API version 57.0 and later.

### [ActionableListColumn](#)

Represents information about the columns in an actionable list. This object is available in API version 57.0 and later.

[ActionableListFilterCondition](#)

Represents the filter condition for including or excluding data from the dataset associated with the actionable list. This object is available in API version 59.0 and later.

[ActionableListFilterCriteria](#)

Represents a logical expression containing filter conditions to include or exclude data from the dataset that's associated with the actionable list. This object is available in API version 59.0 and later.

[ActionableListDefFltrCond](#)

Represents the filter condition for including or excluding data from the dataset associated with the actionable list definition. This object is available in API version 60.0 and later.

[ActionableListDefFltrCrit](#)

Represents a logical expression containing filter conditions to include or exclude data from the dataset that's associated with the actionable list definition. This object is available in API version 60.0 and later.

## ActionableList

Represents an actionable list. 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

Access to this object requires Industries Sales Excellence add-on and the Actionable Segmentation Permission Set License.

### Fields

Field	Details
ActionableListDefinitionId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort
	<b>Description</b> The list definition that's associated with the actionable list. This field is a relationship field.
	<b>Relationship Name</b> ActionableListDefinition
	<b>Relationship Type</b> Lookup
	<b>Refers To</b> ActionableListDefinition

Field	Details
AssigneeId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The person to whom an actionable list is assigned. This field is a polymorphic relationship field.</p> <p><b>Relationship Name</b> Assignee</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> Group, User</p>
AssigneeType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The type of assignee of an actionable list. Available in API version 58.0 and later. Possible values are:</p> <ul style="list-style-type: none"> <li>• Queue</li> <li>• RecordOwner</li> <li>• User</li> </ul>
AssignmentStatus	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> The status of the assignment done for an actionable list. Available in API version 58.0 and later. Possible values are:</p> <ul style="list-style-type: none"> <li>• Failed</li> <li>• InProgress</li> <li>• PartiallyComplete</li> <li>• Success</li> <li>• Waiting</li> </ul>

Field	Details
AutomaticAssigneeId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The assignee to whom the new members in an actionable list are automatically assigned. Available in API version 59.0 and later.  This field is a polymorphic relationship field.</p> <p><b>Relationship Name</b> AutomaticAssignee</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> Group, User</p>
AutomaticAssigneeType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> Specifies the type of assignee to which the new members in an actionable list are automatically assigned. Available in API version 59.0 and later.  Possible values are:</p> <ul style="list-style-type: none"> <li>• Queue</li> <li>• RecordOwner</li> <li>• User</li> </ul>
BatchCalcJobDefinitionId	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The batch calculation job definition associated with the actionable list. Available in API version 59.0 and later.  This field is a relationship field.</p> <p><b>Relationship Name</b> BatchCalcJobDefinition</p> <p><b>Relationship Type</b> Lookup</p>

Field	Details
	<b>Refers To</b> BatchCalcJobDefinition
CompletionDate	<b>Type</b> dateTime <b>Properties</b> Create, Filter, Nillable, Sort, Update <b>Description</b> The last date for completing engagement with the members in an actionable list. Available in API version 58.0 and later.
CurrencyIsoCode	<b>Type</b> picklist <b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update <b>Description</b> The ISO currency code for the postauthorization request. Valid values are: <ul style="list-style-type: none"> <li>USD—U.S. Dollar</li> </ul> The default value is USD. Available in API version 62.0 and later.
DefaultMemberStatusId	<b>Type</b> reference <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> The default actionable list member status. This field is a relationship field. <b>Relationship Name</b> DefaultMemberStatus <b>Relationship Type</b> Lookup <b>Refers To</b> ActionableListMemberStatus
DefaultSortMemberField	<b>Type</b> string <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update

Field	Details
	<b>Description</b> The default field name used for sorting the actionable list members in Outreach List. Available in API version 58.0 and later.
Description	<b>Type</b> string <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> The description about the actionable list.
IsActionableListConfigured	<b>Type</b> boolean <b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update <b>Description</b> Indicates if an actionable list is configured ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> .
IsAutoAssignmentAllowed	<b>Type</b> boolean <b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update <b>Description</b> Indicates whether automatic assignment of new actionable list members is allowed ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> .
IsSynchronizationAllowed	<b>Type</b> boolean <b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update <b>Description</b> Indicates whether an actionable list is refreshed ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> . Available in API version 62.0 and later.
LastMemberAddDateTime	<b>Type</b> string <b>Properties</b> Filter, Group, Nillable, Sort

Field	Details
	<b>Description</b> The date and time when the last member was added to an actionable list in epoch time format.
LastReferencedDate	<b>Type</b> dateTime <b>Properties</b> Filter, Nillable, Sort <b>Description</b> The timestamp when the current user last accessed this record, a record related to this record, or a list view.
LastViewedDate	<b>Type</b> dateTime <b>Properties</b> Filter, Nillable, Sort <b>Description</b> The timestamp when the current user last viewed this record or list view.
ListStatus	<b>Type</b> picklist <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> The status of the actionable list. Possible values are: <ul style="list-style-type: none"> <li>• Active</li> <li>• Archived</li> <li>• Draft</li> <li>• Processing</li> </ul>
MemberCount	<b>Type</b> int <b>Properties</b> Filter, Group, Nillable, Sort <b>Description</b> The actionable list members count.
MemberCountLastModDtTime	<b>Type</b> dateTime

Field	Details
	<p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The date and time when the member count of an actionable list was last modified.</p>
MemberSortOrder	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The default sort order used for sorting the actionable list members in Outreach List. Possible values are:</p> <ul style="list-style-type: none"> <li>• Ascending</li> <li>• Descending</li> </ul>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, idLookup, Sort, Update</p> <p><b>Description</b> The name of the actionable list.</p>
ObjectName	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> The object for which the actionable list is created. Possible values are organized by the API version in which they were introduced. Values are available in all versions after introduction unless noted otherwise. Possible values are: API version 60.0 and later: PersonLifeEvent API version 60.0 and later with Insurance Managed Package:</p> <ul style="list-style-type: none"> <li>• Claim</li> <li>• InsurancePolicy</li> <li>• Quote</li> </ul> <p>API version 59.0 and later with Health Cloud:</p> <ul style="list-style-type: none"> <li>• CareFacilityBed</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>CareRequest</li> <li>CareRequestItem</li> <li>CareServiceVisit</li> <li>CareServiceVisitPlan</li> <li>ClinicalServiceRequest</li> </ul> <p>API version 59.0 and later with Loyalty Cloud:</p> <ul style="list-style-type: none"> <li>LoyaltyProgramMember</li> </ul> <p>API version 59.0 and later:</p> <ul style="list-style-type: none"> <li>Case</li> </ul> <p>API version 58.0 and later with Automotive Cloud:</p> <ul style="list-style-type: none"> <li>Vehicle</li> </ul> <p>API version 58.0 and later:</p> <ul style="list-style-type: none"> <li>Asset</li> <li>Lead</li> <li>Opportunity</li> </ul> <p>API version 57.0 and later:</p> <ul style="list-style-type: none"> <li>Account</li> <li>Contact</li> </ul>
OmniScriptKey	<p><b>Type</b> textarea</p> <p><b>Properties</b> Create, Nillable, Update</p> <p><b>Description</b> The key that's created by combining the type, subtype, and language of the OmniScript with a '/' separating these values.</p>
OwnerId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> The key that's created by combining the type, subtype, and language of the OmniScript with a '/' separating these values.  This field is a polymorphic relationship field.</p> <p><b>Relationship Name</b> Owner</p> <p><b>Relationship Type</b> Lookup</p>

Field	Details
	<b>Refers To</b> Group, User
Priority	<b>Type</b> picklist <b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update <b>Description</b> The priority of an Actionable List. Possible values are: <ul style="list-style-type: none"> <li>• High</li> <li>• Low</li> <li>• Medium</li> </ul>
SegmentIdentifier	<b>Type</b> string <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> The ID of the segment on which an actionable list is created. Available in API version 62.0 and later.
SegmentMembershipTable	<b>Type</b> string <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> The name of the segment membership history table that tracks the existing records in a segment and the records that were added or removed from the segment. Available in API version 62.0 and later.
SourceType	<b>Type</b> picklist <b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort <b>Description</b> The source type of the actionable list. Possible values are: <ul style="list-style-type: none"> <li>• CrmAnalytics—Crm Analytics</li> <li>• DataCloudPlatform—Data Cloud Platform</li> </ul>

Field	Details
Status	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> The status of the actionable list. Possible values are:</p> <ul style="list-style-type: none"> <li>Failed</li> <li>Queued</li> <li>Success</li> </ul>
SyncStartDateTime	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The date and time when an actionable list started to synchronize with a Data Cloud segment. Available in API version 62.0 and later.</p>
SynchronizationFailureCount	<p><b>Type</b> int</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The number of times an actionable list fails to synchronize with a Data Cloud segment. Available in API version 62.0 and later.</p>
SynchronizationOperationType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The type of operation that's performed when an actionable list synchronizes with a Data Cloud segment. Valid values are:</p> <ul style="list-style-type: none"> <li>Insert</li> <li>Update</li> </ul> <p>Available in API version 62.0 and later.</p>

## Associated Objects

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

### [ActionableListChangeEvent](#) on page 1586

Change events are available for the object.

### [ActionableListFeed](#) on page 1589

Feed tracking is available for the object.

### [ActionableListHistory](#) on page 1597

History is available for tracked fields of the object.

### [ActionableListOwnerSharingRule](#) on page 1602

Sharing rules are available for the object.

### [ActionableListShare](#) on page 1606

Sharing is available for the object.

## ActionableListMember

Represents an individual actionable list item. 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

Access to this object requires the Industries Sales Excellence add-on and the Actionable Segmentation permission set license.

## Fields

Field	Details
ActionableListId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> The actionable list that's associated with the member. This field is a relationship field.</p> <p><b>Relationship Name</b> ActionableList</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> ActionableList</p>

Field	Details
ActionableListMemberStatusId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The status of the actionable list member. This field is a relationship field.</p> <p><b>Relationship Name</b> ActionableListMemberStatus</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> ActionableListMemberStatus</p>
AdditionalIdentifier	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p><b>Description</b> The ID of the actionable list member record created by combining the record's actionable list ID and reference record values. Available in API version 61.0 and later.</p>
AssignmentMethod	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The method used to assign members to an actionable list. Possible values are:</p> <ul style="list-style-type: none"> <li>Automatic Assignment—AutomaticAssignment</li> <li>Change Assignee—ChangeAssignee</li> <li>Configure And Assign List—ConfigureAndAssignList</li> </ul>
AssignmentStatus	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The assignment status of an actionable list member. Possible values are:</p>

Field	Details
	<ul style="list-style-type: none"> <li>Assigned</li> <li>Failed</li> <li>ToBeAssigned</li> <li>Unassigned</li> </ul>
CurrencyIsoCode	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The ISO currency code for the postauthorization request. Valid values are:</p> <ul style="list-style-type: none"> <li>USD—U.S. Dollar</li> </ul> <p>The default value is USD. Available in API version 62.0 and later.</p>
InsertOperationOnSync	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The value to determine whether the insert operation is allowed or not on an actionable list when the list synchronizes with a Data Cloud segment. Valid values are:</p> <ul style="list-style-type: none"> <li>Allowed</li> <li>Not Allowed</li> </ul> <p>Available in API version 62.0 and later.</p>
LastReferencedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp when the current user last accessed this record, a record related to this record, or a list view.</p>
LastViewedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p>

Field	Details
	<b>Description</b> The timestamp when the current user last viewed this record or list view.
Name	<b>Type</b> string <b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort <b>Description</b> The name of the actionable list member.
OwnerId	<b>Type</b> reference <b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update <b>Description</b> The owner that's associated with the actionable list member. This field is a polymorphic relationship field. <b>Relationship Name</b> Owner <b>Relationship Type</b> Lookup <b>Refers To</b> Group, User
RecordStatus	<b>Type</b> picklist <b>Properties</b> Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort <b>Description</b> The status of the actionable list member. Possible values are: <ul style="list-style-type: none"> <li>Active</li> <li>Inactive</li> </ul> The default value is <code>Active</code> . Available in API version 61.0 and later.
ReferenceRecordId	<b>Type</b> reference <b>Properties</b> Create, Filter, Group, Sort

Field	Details
	<p><b>Description</b></p> <p>The record of the reference object that's associated with the member.</p> <p>This field is a polymorphic relationship field.</p> <p><b>Relationship Name</b></p> <p>ReferenceRecord</p> <p><b>Relationship Type</b></p> <p>Lookup</p> <p><b>Refers To</b></p> <p>Account, Asset, Case, Contact, Lead, Opportunity</p>
SourceRecordStatus	<p><b>Type</b></p> <p>picklist</p> <p><b>Properties</b></p> <p>Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b></p> <p>The status of the actionable list member record in the associated Data Cloud segment or other sources.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>existing</li> <li>new</li> <li>removed</li> </ul> <p>The default value is <code>new</code>. Available in API version 61.0 and later.</p>

## Associated Objects

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

**ActionableListMemberChangeEvent** on page 1586

Change events are available for the object.

**ActionableListMemberFeed** on page 1589

Feed tracking is available for the object.

**ActionableListMemberHistory** on page 1597

History is available for tracked fields of the object.

**ActionableListMemberOwnerSharingRule** on page 1602

Sharing rules are available for the object.

**ActionableListMemberShare** on page 1606

Sharing is available for the object.

## ActionableListColumn

Represents information about the columns in an actionable list. 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
ActionableListId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> The actionable list that's associated with the column.  This field is a relationship field.</p> <p><b>Relationship Name</b> ActionableList</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> ActionableList</p>
DisplayOrder	<p><b>Type</b> int</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The order in which the actionable list dataset columns are displayed.</p>
LastReferencedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp when the current user last accessed this record, a record related to this record, or a list view.</p>
LastViewedDate	<p><b>Type</b> dateTime</p>

Field	Details
	<b>Properties</b> Filter, Nillable, Sort  <b>Description</b> The timestamp when the current user last viewed this record or list view.
Name	<b>Type</b> string  <b>Properties</b> Create, Filter, Group, idLookup, Sort, Update  <b>Description</b> The name of the actionable list column.

## Associated Objects

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

### [ActionableListColumnFeed](#) on page 1589

Feed tracking is available for the object.

### [ActionableListColumnHistory](#) on page 1597

History is available for tracked fields of the object.

## ActionableListFilterCondition

Represents the filter condition for including or excluding data from the dataset associated with the actionable list. This object is available in API version 59.0 and later.

## Supported Calls

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

## Fields

Field	Details
ActionableListDatasetColumnId	<b>Type</b> reference  <b>Properties</b> Create, Filter, Group, Nillable, Sort  <b>Description</b> The dataset column associated with the actionable list filter condition.  This field is a relationship field.

Field	Details
	<p><b>Relationship Name</b> ActionableListDatasetColumn</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> ActionableListDatasetColumn</p>
ActionableListFilterCritId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> The filter criteria associated with the individual filter condition. This field is a relationship field.</p> <p><b>Relationship Name</b> ActionableListFilterCrit</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> ActionableListFilterCriteria</p>
CurrencyIsoCode	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The ISO code for any currency allowed by the organization. Available only for organizations with the multicurrency feature enabled. Possible values are:</p> <ul style="list-style-type: none"> <li>• INR—Indian Rupee</li> <li>• USD—U.S. Dollar</li> </ul> <p>The default value is USD.</p>
DataDomain	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The data domain that is mapped to the data type of the dataset column. Possible values are:</p>

Field	Details
	<ul style="list-style-type: none"> <li>Dates</li> <li>Dimensions</li> <li>Measures</li> </ul>
LastReferencedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp when the current user last accessed this record, a record related to this record, or a list view.</p>
LastViewedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp when the current user last viewed this record or list view.</p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p><b>Description</b> The auto-assigned number that identifies the actionable list filter condition record.</p>
Operator	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The operator used in the filter condition. Possible values are:</p> <ul style="list-style-type: none"> <li>contains</li> <li>equals</li> <li>greaterThan</li> <li>greaterThanOrEquals</li> <li>isNotNull</li> <li>isNull</li> <li>lessThan</li> <li>lessThanOrEquals</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>notEquals</li> </ul>
SequenceNumber	<p><b>Type</b> int</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The sequential number assigned to the filter condition.</p>
SourceColumnApiName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort</p> <p><b>Description</b> The API name of the column in the source dataset associated with the actionable list.</p>
Value	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The value in the filter condition.</p>

## Associated Objects

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

**[ActionableListFilterConditionChangeEvent](#) on page 1586**

Change events are available for the object.

**[ActionableListFilterConditionFeed](#) on page 1589**

Feed tracking is available for the object.

**[ActionableListFilterConditionHistory](#) on page 1597**

History is available for tracked fields of the object.

**[ActionableListFilterConditionOwnerSharingRule](#) on page 1602**

Sharing rules are available for the object.

**[ActionableListFilterConditionShare](#) on page 1606**

Sharing is available for the object.

## ActionableListFilterCriteria

Represents a logical expression containing filter conditions to include or exclude data from the dataset that's associated with the actionable list. This object is available in API version 59.0 and later.

## Supported Calls

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

## Fields

Field	Details
ActionableListId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> The actionable list associated with the filter criteria.  This field is a relationship field.</p> <p><b>Relationship Name</b> ActionableList</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> ActionableList</p>
CurrencyIsoCode	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The ISO code for any currency allowed by the organization. Available only for organizations with the multicurrency feature enabled.  Possible values are:</p> <ul style="list-style-type: none"> <li>• INR—Indian Rupee</li> <li>• USD—U.S. Dollar</li> </ul> <p>The default value is USD.</p>
FilterLogic	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort</p> <p><b>Description</b> The logical expression of the filter criteria in the text format.</p>
LastReferencedDate	<p><b>Type</b> dateTime</p>

Field	Details
	<b>Properties</b> Filter, Nillable, Sort  <b>Description</b> The timestamp when the current user last accessed this record, a record related to this record, or a list view.
LastViewedDate	<b>Type</b> dateTime  <b>Properties</b> Filter, Nillable, Sort  <b>Description</b> The timestamp when the current user last viewed this record or list view.
Name	<b>Type</b> string  <b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort  <b>Description</b> Auto-assigned number that identifies the actionable list filter criteria record.
SourceType	<b>Type</b> picklist  <b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort  <b>Description</b> The source type of the actionable list.  Possible values are: <ul style="list-style-type: none"> <li>• <code>CrmAnalytics</code>—Crm Analytics</li> <li>• <code>DataCloudPlatform</code>—Data Cloud Platform</li> </ul>

## ActionableListDefFtrCond

Represents the filter condition for including or excluding data from the dataset associated with the actionable list definition. This object is available in API version 60.0 and later.

### Supported Calls

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

## Fields

Field	Details
ActionableListDatasetColumnId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort</p> <p><b>Description</b> The actionable list dataset column associated with the actionable list filter condition. This field is a relationship field.</p> <p><b>Relationship Name</b> ActionableListDatasetColumn</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> ActionableListDatasetColumn</p>
ActionableListDefFltrCritId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> The filter criteria associated with the individual filter condition in the actionable list definition. This field is a relationship field.</p> <p><b>Relationship Name</b> ActionableListDefFltrCrit</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> ActionableListDefFltrCrit</p>
CurrencyIsoCode	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The ISO code for any currency allowed by the organization. Available only for organizations with the multicurrency feature enabled. Possible values are:</p> <ul style="list-style-type: none"> <li>• INR—Indian Rupee</li> <li>• USD—U.S. Dollar</li> </ul>

Field	Details
	The default value is USD.
DataDomain	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The data domain that is mapped to the data type of the dataset column. Possible values are:</p> <ul style="list-style-type: none"> <li>• Dates</li> <li>• Dimensions</li> <li>• Measures</li> </ul>
LastReferencedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp when the current user last accessed this record, a record related to this record, or a list view.</p>
LastViewedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp when the current user last viewed this record or list view.</p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p><b>Description</b> The auto-assigned number that identifies the actionable list definition filter condition record.</p>
Operator	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> The operator used in the filter condition.</p>

Field	Details
	<p>Possible values are:</p> <ul style="list-style-type: none"> <li>contains</li> <li>equals</li> <li>greaterThan</li> <li>greaterThanOrEqualTo</li> <li>in</li> <li>isNotNull</li> <li>isNull</li> <li>lessThan</li> <li>lessThanOrEqualTo</li> <li>notEquals</li> <li>notIn</li> </ul>
SequenceNumber	<p><b>Type</b> int</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The sequential number assigned to the filter condition.</p>
SourceColumnApiName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> The API name of the column in the source dataset associated with the actionable list definition.</p>
Value	<p><b>Type</b> textarea</p> <p><b>Properties</b> Create, Nillable, Update</p> <p><b>Description</b> The value in the filter condition.</p>

## Associated Objects

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

### [ActionableListDefFtrCondChangeEvent](#) on page 1586

Change events are available for the object.

**ActionableListDefFtrCondFeed on page 1589**

Feed tracking is available for the object.

**ActionableListDefFtrCondHistory on page 1597**

History is available for tracked fields of the object.

**ActionableListDefFtrCondOwnerSharingRule on page 1602**

Sharing rules are available for the object.

**ActionableListDefFtrCondShare on page 1606**

Sharing is available for the object.

## ActionableListDefFtrCrit

Represents a logical expression containing filter conditions to include or exclude data from the dataset that's associated with the actionable list definition. This object is available in API version 60.0 and later.

### Supported Calls

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

### Special Access Rules

### Fields

Field	Details
ActionableListDefinitionId	<b>Type</b> reference <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> The actionable list definition associated with the filter criteria. This field is a relationship field. <b>Relationship Name</b> ActionableListDefinition <b>Relationship Type</b> Lookup <b>Refers To</b> ActionableListDefinition
CurrencyIsoCode	<b>Type</b> picklist <b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update

Field	Details
	<p><b>Description</b></p> <p>The ISO code for any currency allowed by the organization. Available only for organizations with the multicurrency feature enabled.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• INR—Indian Rupee</li> <li>• USD—U.S. Dollar</li> </ul> <p>The default value is USD.</p>
Description	<p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b></p> <p>The description of the actionable list definition filter criteria.</p>
FilterLogic	<p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b></p> <p>The logical expression of the filter criteria in the text format.</p>
LastReferencedDate	<p><b>Type</b></p> <p>dateTime</p> <p><b>Properties</b></p> <p>Filter, Nillable, Sort</p> <p><b>Description</b></p> <p>The timestamp when the current user last accessed this record, a record related to this record, or a list view.</p>
LastViewedDate	<p><b>Type</b></p> <p>dateTime</p> <p><b>Properties</b></p> <p>Filter, Nillable, Sort</p> <p><b>Description</b></p> <p>The timestamp when the current user last viewed this record or list view.</p>
Name	<p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Create, Filter, Group, idLookup, Sort, Update</p>

Field	Details
	<b>Description</b> Auto-assigned number that identifies the actionable list definition filter criteria record.
SharingType	<b>Type</b> picklist  <b>Properties</b> Create, Filter, Group, Restricted picklist, Sort, Update  <b>Description</b> Specifies the sharing type for the filter criteria.  Possible values are: <ul style="list-style-type: none"> <li>• Private</li> <li>• Public</li> </ul>

## Associated Objects

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

### [ActionableListDefFltrCritChangeEvent](#) on page 1586

Change events are available for the object.

### [ActionableListDefFltrCritFeed](#) on page 1589

Feed tracking is available for the object.

### [ActionableListDefFltrCritHistory](#) on page 1597

History is available for tracked fields of the object.

### [ActionableListDefFltrCritOwnerSharingRule](#) on page 1602

Sharing rules are available for the object.

### [ActionableListDefFltrCritShare](#) on page 1606

Sharing is available for the object.

## Actionable Segmentation Custom Objects

This section provides details on custom objects, including junction objects. The Junction Object is a custom object that enables you to link a custom object with a large number of child records and link each child record to a large number of parent objects.

### [ActionableListDtastClmnUsr](#)

Represents the user preference for an actionable list dataset column. This object is available in API version 59.0 and later.

## ActionableListDtastClmnUsr

Represents the user preference for an actionable list dataset column. This object is available in API version 59.0 and later.

## Supported Calls

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

## Fields

Field	Details
ActionableListDatasetColumnId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The actionable list dataset column associated with the user preference.  This field is a relationship field.</p> <p><b>Relationship Name</b> ActionableListDatasetColumn</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> ActionableListDatasetColumn</p>
ColumnDisplayOrder	<p><b>Type</b> int</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The order in which the actionable list dataset columns are displayed.</p>
CurrencyIsoCode	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The ISO code for any currency allowed by the organization. Available only for organizations with the multicurrency feature enabled.  Possible values are:</p> <ul style="list-style-type: none"> <li>• INR—Indian Rupee</li> <li>• USD—U.S. Dollar</li> </ul> <p>The default value is USD.</p>
LastReferencedDate	<p><b>Type</b> dateTime</p>

Field	Details
	<p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp when the current user last accessed this record, a record related to this record, or a list view.</p>
LastViewedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp when the current user last viewed this record or list view.</p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p><b>Description</b> The auto-assigned number that identifies the actionable list dataset column user record.</p>
OwnerId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> The owner ID of the actionable list dataset column user record.  This field is a polymorphic relationship field.</p> <p><b>Relationship Name</b> Owner</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> Group, User</p>
ShouldDisplayColumn	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> Indicates whether the dataset column appears in the actionable list (<code>true</code>) or not (<code>false</code>).  The default value is <code>false</code>.</p>

Field	Details
UserId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The actionable list user associated with the actionable list dataset column. This field is a relationship field.</p> <p><b>Relationship Name</b> User</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> User</p>

## Associated Objects

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

### [ActionableListDtastClmnUsrChangeEvent](#) on page 1586

Change events are available for the object.

### [ActionableListDtastClmnUsrFeed](#) on page 1589

Feed tracking is available for the object.

### [ActionableListDtastClmnUsrHistory](#) on page 1597

History is available for tracked fields of the object.

### [ActionableListDtastClmnUsrOwnerSharingRule](#) on page 1602

Sharing rules are available for the object.

### [ActionableListDtastClmnUsrShare](#) on page 1606

Sharing is available for the object.

## Actionable Segmentation Metadata API Types

Use the Actionable Segmentation metadata types to set up actionable list definitions. Create actionable list definitions, configure visible columns for actionable lists, and configure list member statuses before activating list definitions.

### [ActionableListDefinition](#)

Represents the data source definition details associated with an actionable list.

## ActionableListDefinition

Represents the data source definition details associated with an actionable list.

 **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

ActionableListDefinition components have the suffix `.actionableListDefinition` and are stored in the `actionableListDefinitions` folder.

## Version

ActionableListDefinition components are available in API version 57.0 and later.

## Fields

Field Name	Description
<code>actionableListDatasetColumns</code>	<p><b>Field Type</b> <code>ActionableListDatasetColumn[]</code></p> <p><b>Description</b> The object that stores columns in a dataset associated with an actionable list.</p>
<code>actionableListMemberStatuses</code>	<p><b>Field Type</b> <code>ActionableListMemberStatus[]</code></p> <p><b>Description</b> The object that stores the status and the corresponding status icon details of an individual actionable list member.</p>
<code>batchCalcJobDefinition</code>	<p><b>Field Type</b> string</p> <p><b>Description</b> The batch calculation job definition that's associated with the creation of an actionable list. This field is a relationship field.</p>
<code>datasetName</code>	<p><b>Field Type</b> string</p> <p><b>Description</b> The name of the dataset that is associated with the actionable list.</p>
<code>edgeMart</code>	<p><b>Field Type</b> string</p>

Field Name	Description
	<b>Description</b> The edgemart dataset that's associated with the actionable list. Available in API version 58.0 and later.
isActive	<b>Field Type</b> boolean <b>Description</b> Indicates whether the actionable list definition is active ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> .
masterLabel	<b>Field Type</b> string <b>Description</b> Required. The master label of the actionable list definition.
objectName	<b>Field Type</b> string <b>Description</b> Required. The object for which the actionable list is created. Possible values are organized by the API version in which they were introduced. Values are available in all versions after introduction unless noted otherwise. Possible values are: API version 60.0 and later: <code>PersonLifeEvent</code> API version 60.0 and later with Insurance Managed Package: <ul style="list-style-type: none"> <li>• <code>Claim</code></li> <li>• <code>InsurancePolicy</code></li> <li>• <code>Quote</code></li> </ul> API version 59.0 and later with Health Cloud: <ul style="list-style-type: none"> <li>• <code>CareFacilityBed</code></li> <li>• <code>CareRequest</code></li> <li>• <code>CareRequestItem</code></li> <li>• <code>CareServiceVisit</code></li> <li>• <code>CareServiceVisitPlan</code></li> <li>• <code>ClinicalServiceRequest</code></li> </ul> API version 59.0 and later with Loyalty Cloud:

Field Name	Description
	<ul style="list-style-type: none"> <li>• <code>LoyaltyProgramMember</code></li> </ul> <p>API version 59.0 and later:</p> <ul style="list-style-type: none"> <li>• <code>Case</code></li> </ul> <p>API version 58.0 and later with Automotive Cloud:</p> <ul style="list-style-type: none"> <li>• <code>Vehicle</code></li> </ul> <p>API version 58.0 and later:</p> <ul style="list-style-type: none"> <li>• <code>Asset</code></li> <li>• <code>Lead</code></li> <li>• <code>Opportunity</code></li> </ul> <p>API version 57.0 and later:</p> <ul style="list-style-type: none"> <li>• <code>Account</code></li> <li>• <code>Contact</code></li> </ul>

## ActionableListDatasetColumn

Represents the information about the columns in a dataset associated with an actionable list.

**Table 1: Fields**

Field Name	Description
<code>dataDomain</code>	<p><b>Field Type</b> DatasetColumnDataType (enumeration of type string)</p> <p><b>Description</b> The data domain that is mapped to the data type of the dataset column. Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>Dates</code></li> <li>• <code>Dimensions</code></li> <li>• <code>Measures</code></li> </ul>
<code>dataType</code>	<p><b>Field Type</b> DatatableDataType (enumeration of type string)</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The data type of the dataset column in the actionable list. Available in API version 58.0 and later. Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>Boolean</code></li> <li>• <code>Currency</code></li> </ul>

Field Name	Description
	<ul style="list-style-type: none"> <li>• Date</li> <li>• DateTime</li> <li>• Email</li> <li>• Location</li> <li>• Number</li> <li>• Percent</li> <li>• Phone</li> <li>• Text</li> <li>• Url</li> </ul>
displayOrder	<p><b>Field Type</b> int</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The order in which the actionable list dataset columns are displayed. Available in API version 58.0 and later.</p>
isDefault	<p><b>Field Type</b> boolean</p> <p><b>Description</b> Indicates whether the dataset column is added to the actionable list by default (<code>true</code>) or not (<code>false</code>).  The default value is <code>false</code>.</p>
isGroupedByListDefObj	<p><b>Field Type</b> boolean</p> <p><b>Description</b> Indicates whether the dataset column is grouped by the object defined in the actionable list definition (<code>true</code>) or not (<code>false</code>). Available in API version 59.0 and later.</p>
IsTypeAheadSearchEnabled	<p><b>Field Type</b> boolean</p> <p><b>Description</b> Indicates whether the type-ahead search for filters is enabled (<code>true</code>) or not (<code>false</code>). Available in API version 60.0 and later.</p>
objectName	<p><b>Field Type</b> string</p> <p><b>Description</b> The name of the object that's associated with the dataset column.</p>

Field Name	Description
	<p>Possible values are:</p> <p>API version 60.0 and later:</p> <p>PersonLifeEvent</p> <p>API version 60.0 and later with Insurance Managed Package:</p> <ul style="list-style-type: none"> <li>• Claim</li> <li>• InsurancePolicy</li> <li>• Quote</li> </ul> <p>API version 59.0 and later with Health Cloud:</p> <ul style="list-style-type: none"> <li>• CareFacilityBed</li> <li>• CareRequest</li> <li>• CareRequestItem</li> <li>• CareServiceVisit</li> <li>• CareServiceVisitPlan</li> <li>• ClinicalServiceRequest</li> </ul> <p>API version 59.0 and later with Loyalty Cloud:</p> <ul style="list-style-type: none"> <li>• LoyaltyProgramMember</li> </ul> <p>API version 59.0 and later:</p> <ul style="list-style-type: none"> <li>• Case</li> </ul> <p>API version 58.0 and later with Automotive Cloud:</p> <ul style="list-style-type: none"> <li>• Vehicle</li> </ul> <p>API version 58.0 and later:</p> <ul style="list-style-type: none"> <li>• Asset</li> <li>• Lead</li> <li>• Opportunity</li> </ul> <p>API version 57.0 and later:</p> <ul style="list-style-type: none"> <li>• Account</li> <li>• Contact</li> </ul>
sourceColumnNameApiName	<p><b>Field Type</b></p> <p>string</p> <p><b>Description</b></p> <p>The API name of the column in the source dataset.</p>
sourceFieldName	<p><b>Field Type</b></p> <p>string</p> <p><b>Description</b></p> <p>The name of the field in the object for which the actionable list dataset is created.</p>

## ActionableListMemberStatus

Represents the status and the corresponding status icon details of an individual actionable list member.

**Table 2: Fields**

Field Name	Description
iconName	<b>Field Type</b> string  <b>Description</b> The name of the icon that's mapped to the status.
status	<b>Field Type</b> string  <b>Description</b> The status of the actionable list member.

## Declarative Metadata Sample Definition

The following is an example of a ActionableListDefinition component.

```
<?xml version="1.0" encoding="UTF-8"?>
<ActionableListDefinition
  xmlns="http://soap.sforce.com/2006/04/metadata">
  <actionableListDatasetColumns>
    <isDefault>true</isDefault>
    <sourceFieldName>NewColumn1</sourceFieldName>
  </actionableListDatasetColumns>
  <actionableListDatasetColumns>
    <sourceColumnApiName>ApiName</sourceColumnApiName>
    <dataDomain>Dimensions</dataDomain>
    <isDefault>>false</isDefault>
    <sourceFieldName>NewColumn2</sourceFieldName>
    <objectName>Account</objectName>
    <displayOrder>1</displayOrder>
    <dataType>Text</dataType>
  </actionableListDatasetColumns>
  <actionableListMemberStatuses>
    <iconName>NewMember1</iconName>
    <status>Active</status>
  </actionableListMemberStatuses>
  <isActive>true</isActive>
  <masterLabel>NewMember2</masterLabel>
  <objectName>Account</objectName>
  <isProtected>true</isProtected>
  <batchCalcJobDefinition>Test1</batchCalcJobDefinition>
  <datasetName>AccountDef</datasetName>
</ActionableListDefinition>
```

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>ActionableListDefinition</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](#).

## Business Rules Engine

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.

### Expression Set

Expression sets consist of a series of steps connected in a logical flow built from variables, constants, conditions, calculations, lookups, and aggregations.

### 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.

### 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.

### 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.

### EDITIONS

Available in: Lightning Experience

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

### SEE ALSO:

[Salesforce Help: Permission Sets for Business Rules Engine](#)

## 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.

[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.

## 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.


## Supported Calls

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

## Fields

Field	Details
ApiName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, idLookup, Sort, Update</p> <p><b>Description</b> The API name of the expression set. This field is unique within your organization. This is a required field.</p>
Description	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The description of the expression set.</p>
ExecutionScale	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Specifies the scale of the input that an expression set processes. The scale determines where the expression set is executed.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• High</li> <li>• Low</li> </ul>
ExpressionSetDefinitionId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The expression set definition record associated with this expression set. This is a required field.</p> <p>This is a relationship field.</p> <p><b>Relationship Name</b> ExpressionSetDefinition</p> <p><b>Relationship Type</b> Lookup</p>

Field	Details
	<b>Refers To</b> ExpressionSetDefinition
LastReferencedDate	<b>Type</b> dateTime  <b>Properties</b> Filter, Nillable, Sort  <b>Description</b> The timestamp when the current user last accessed this record, a record related to this record, or a list view.
LastViewedDate	<b>Type</b> dateTime  <b>Properties</b> Filter, Nillable, Sort  <b>Description</b> The 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	<b>Type</b> string  <b>Properties</b> Create, Filter, Group, idLookup, Sort, Update  <b>Description</b> The name of the expression set. This is a required field.
OwnerId	<b>Type</b> reference  <b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update  <b>Description</b> The ID of the user who currently owns this expression set. Default value is the user logged in to the API to perform the create action  This is a polymorphic relationship field.  <b>Relationship Name</b> Owner  <b>Relationship Type</b> Lookup  <b>Refers To</b> Group, User

Field	Details
UsageType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> The type of industry that's using the expression set. Possible values are:</p> <ul style="list-style-type: none"> <li>• Bre</li> </ul> <p> <b>Note:</b> 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.</p>

## 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	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> API name of the context definition.</p>
ContextDefinitionId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> ID of the context definition. This field is a relationship field.</p> <p><b>Relationship Name</b> ContextDefinition</p> <p><b>Relationship Type</b> Lookup</p>

Field	Details
	<b>Refers To</b> ContextDefinition
ExecutableContextDefinition	<b>Type</b> string <b>Properties</b> Create, Filter, Group, Nillable, Sort <b>Description</b> Developer name of the file-based context definition.
ExpressionSetApiName	<b>Type</b> string <b>Properties</b> Filter, Group, Nillable, Sort <b>Description</b> API name of the expression set.
ExpressionSetDefinitionId	<b>Type</b> reference <b>Properties</b> Create, Filter, Group, Sort <b>Description</b> ID of the expression set definition. This field is a relationship field. <b>Relationship Name</b> ExpressionSetDefinition <b>Relationship Type</b> Lookup <b>Refers To</b> 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	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, idLookup, Sort, Update</p> <p><b>Description</b> The API name of the expression set version. This is a required field and it requires a unique value.</p>
Description	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The description of the expression set version,</p>
EndTime	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The date and time when the expression set version becomes inactive.</p>
ExpressionSetDefinitionVerId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The expression set definition version associated with this expression set version. This is a required field.  This is a relationship field.</p> <p><b>Relationship Name</b> ExpressionSetDefinitionVer</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> ExpressionSetDefinitionVersion</p>
ExpressionSetId	<p><b>Type</b> reference</p>

Field	Details
	<p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> 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.</p> <p><b>Relationship Name</b> ExpressionSet</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> ExpressionSet</p>
IsActive	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> Indicates whether the expression set version is active (<code>true</code>) or not (<code>false</code>). This is a required field. The default value is <code>false</code>.</p>
IsLoopingEnabled	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> Indicates whether looping is active for this expression set version (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
LatestSimulationResult	<p><b>Type</b> textarea</p> <p><b>Properties</b> Create, Nillable, Update</p> <p><b>Description</b> The result of the simulation service that processes the input variables defined for the expression set version, in JSON format.</p>
LoopEndVariableName	<p><b>Type</b> textarea</p>

Field	Details
	<p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The name of the resource that's used to determine which resource can be processed last in the loop.</p>
LoopIncrementVariableName	<p><b>Type</b> textarea</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The name of the variable that's used to determine which resource can be processed next in the loop.</p>
LoopStartVariableName	<p><b>Type</b> textarea</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The name of the variable that's processed when the loop starts.</p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, idLookup, Sort, Update</p> <p><b>Description</b> The name of the expression set version. This is a required field.</p>
Rank	<p><b>Type</b> int</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> 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 an expression set call, and the start and end date time periods overlap, the version with the highest rank is chosen.</p>
ShouldShowExplExternally	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p>

Field	Details
	<p><b>Description</b></p> <p>Indicates whether the decision explanation is exposed to external users (true) or not (false).</p> <p>The default value for this field is <code>false</code>.</p> <p>This field is available in API version 56.0 and later.</p>
StartTime	<p><b>Type</b></p> <p>dateTime</p> <p><b>Properties</b></p> <p>Create, Defaulted on create, Filter, Nillable, Sort, Update</p> <p><b>Description</b></p> <p>The date and time when the expression set version becomes active.</p>
VersionNumber	<p><b>Type</b></p> <p>int</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Sort, Update</p> <p><b>Description</b></p> <p>The version number of this expression set. This is a required field.</p>

## Associated Objects

This object has the following associated objects. If the API version isn'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	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The description of an expression set.</p>
DurableId	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The ID of the expression set.</p>
ExpressionSetDetails	<p><b>Type</b> textarea</p> <p><b>Properties</b> Nillable</p> <p><b>Description</b> 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.</p>
HasContextDefinitionRef	<p><b>Type</b> boolean</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Sort</p> <p><b>Description</b> Indicates whether the executable expression set template references an executable context definition (<code>true</code>) or not (<code>false</code>). The default value is <code>False</code>.  Available in API version 60.0 and later.  The default value is <code>false</code>.</p>
IsExecutable	<p><b>Type</b> boolean</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Sort</p> <p><b>Description</b> Indicates whether the expression set template is executable (<code>true</code>) or not (<code>false</code>).  Available in API version 60.0 and later.</p>

Field	Details
	The default value is <code>false</code> .
IsTemplate	<p><b>Type</b> boolean</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Sort</p> <p><b>Description</b> Indicates whether the expression set is a template (<code>true</code>) or not (<code>false</code>). 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 <code>false</code>.</p>
LastModifiedBy	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The name of the user that last updated the expression set view.</p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The name of the file-based or database expression set.</p>
NamespacePrefix	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> 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 <b><i>namespacePrefix__componentName</i></b> notation.  The namespace prefix can have one of the following values.</p> <ul style="list-style-type: none"> <li>• In Developer Edition orgs, <code>NamespacePrefix</code> 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.</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>In orgs that aren't Developer Edition orgs, <code>NamespacePrefix</code> is set only for objects that are part of an installed managed package. All other objects have no namespace prefix.</li> </ul>
<code>UsageType</code>	<p><b>Type</b> picklist</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> 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:</p> <ul style="list-style-type: none"> <li>Bre—Business Rules Engine</li> </ul> <p>When Business Rules Engine is enabled for a Salesforce instance, the default value is <code>Bre</code>. Other usage types may be available to you depending on your industry solution and permission sets.</p>
<code>UsageTypeLabel</code>	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> Specifies the label of the usage type that's associated with an expression set template</p>

## 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	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> 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.</p>
ExpsSetDefVerVarField	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> Identifies the variable to which this field belongs. This is a required field.</p>
FieldAlias	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> 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.</p>
InstalledPackageName	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The name of the package used to add the record to the org. This is a required field.</p>
LastModifiedBy	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The unique identifier of the user who modified the alias last. This is a required field.</p>
ManageableState	<p><b>Type</b> picklist</p>

Field	Details
	<p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Indicates the manageable state of the specified component that is contained in a package. This is a required field. Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>beta</code>—Managed-Beta</li> <li>• <code>deleted</code>—Managed-Proposed-Deleted</li> <li>• <code>deprecated</code>—Managed-Proposed-Deprecated</li> <li>• <code>deprecatedEditable</code>—SecondGen-Installed-Deprecated</li> <li>• <code>installed</code>—Managed-Installed</li> <li>• <code>installedEditable</code>—SecondGen-Installed-Editable</li> <li>• <code>released</code>—Managed-Released</li> <li>• <code>unmanaged</code>—Unmanaged</li> </ul>
NamespacePrefix	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> 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 <code>namespacePrefix__componentName</code> notation. This is a required field. The namespace prefix can have one of the following values.</p> <ul style="list-style-type: none"> <li>• In Developer Edition orgs, <code>NamespacePrefix</code> 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.</li> <li>• In orgs that are not Developer Edition orgs, <code>NamespacePrefix</code> is set only for objects that are part of an installed managed package. All other objects have no namespace prefix.</li> </ul>
ObjectAlias	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p>

Field	Details
	<p><b>Description</b></p> <p>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.</p>
ObjectApiName	<p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Filter, Group, Nillable, Sort</p> <p><b>Description</b></p> <p>The API name of the source object associated with the object field aliases that are used in an expression set.</p>
SourceFieldType	<p><b>Type</b></p> <p>picklist</p> <p><b>Properties</b></p> <p>Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b></p> <p>The data type of the source object for which the object alias is defined. This is a required field.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>ActionOutput</li> <li>Boolean</li> <li>Currency</li> <li>Date</li> <li>DateTime</li> <li>DecisionMatrix</li> <li>DecisionTable</li> <li>Numeric</li> <li>Percent</li> <li>Subject</li> <li>SubExpression</li> <li>Text</li> </ul> <p>The default value is Text.</p>
SourceFieldDecimalScale	<p><b>Type</b></p> <p>int</p> <p><b>Properties</b></p> <p>Filter, Group, Nillable, Sort</p>

Field	Details
	<b>Description</b> The number of decimal places applied to the value in the source field that's of the type Currency, Percent, or Number.
SourceFieldName	<b>Type</b> string <b>Properties</b> Filter, Group, Nillable, Sort <b>Description</b> 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	<b>Type</b> picklist <b>Properties</b> Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort <b>Description</b> The type of application associated with the industry that's using an expression set. Possible values are: <ul style="list-style-type: none"> <li>• Bre-Default</li> </ul> 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": "110xx0000006PcLEAU"
    }
  ],
  "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"
          }
        }
      ]
    },
    {
      "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	<a href="#">Context Definition Input</a>	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	<a href="#">Expression Set Version Input[]</a>	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/$110xx0000006PcLEAU
```

#### 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/$110xx0000006PcLEAU
```

**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": "110xx0000006PcLEAU"  
    }  
  ],  
  "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

Name	Type	Description	Required or Optional	Available Version
contextDefinitions	<a href="#">Context Definition Input</a>	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	<a href="#">Expression Set Version Input[]</a>	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.   <b>Note:</b> If the expression set uses a field alias as a variable, append <code>Id</code> 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	<a href="#">Expression Set Options Input</a>	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/90ARN000000016v4AA/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	<p>BRE component to fetch the guardrails. It contains a comma-separated list of predefined components.</p> <p>Valid component values are:</p> <ul style="list-style-type: none"> <li>• ExpressionSet</li> <li>• DecisionTable</li> <li>• DecisionMatrix</li> <li>• Explainability</li> <li>• DynamicRules</li> </ul> <p>If no values are provided, guardrails for all components accessible to the user are returned.</p>	Optional	63.0

Parameter Name	Type	Description	Required or Optional	Available Version
isNotification Enabled	Boolean	Indicates whether to return only the guardrails with enabled notifications ( <code>true</code> ) or not ( <code>false</code> ).	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.   <b>Note:</b> 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	<a href="#">Expression Set Options Input</a>	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": "110xx0000006PcLEAU"
    }]
  }
}
```

**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
condition Logic	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	<a href="#">Expression Set Condition Criteria Input[]</a>	List of condition criteria in an expression set.	Required	58.0
result Parameter	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" : {
  "aggregatedParameter" : "v1",
  "aggregateFunction" : "Sum",
  "expression" : "SUM ( v2 )"
}

```

### Properties

Name	Type	Description	Required or Optional	Available Version
aggregated Parameter	String	Expression set version variable that's present on the right side of the aggregation step.	Required	58.0
aggregate Function	String	Aggregation function of the expression set.  Valid values are: <ul style="list-style-type: none"> <li>• Avg</li> </ul>	Required	58.0

Name	Type	Description	Required or Optional	Available Version
		<ul style="list-style-type: none"> <li>• Max</li> <li>• Min</li> <li>• Sum</li> </ul>		
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: <ul style="list-style-type: none"> <li>Contains</li> <li>DoesNotContain</li> <li>Equals</li> <li>GreaterThanOrEquals</li> <li>GreaterThan</li> <li>IsNull</li> <li>IsNotNull</li> <li>LessThan</li> <li>LessThanOrEquals</li> <li>NotEqualTo</li> </ul>	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: <ul style="list-style-type: none"> <li>Formula</li> <li>Literal</li> <li>Parameter</li> </ul>	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 ( <code>true</code> ) or not ( <code>false</code> ).	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 ( <code>true</code> ) or not ( <code>false</code> ).	Required	58.0
type	String	Type of custom element parameter. Valid values are: <ul style="list-style-type: none"> <li>• Formula</li> <li>• Literal</li> <li>• Lookup</li> <li>• Parameter</li> <li>• Picklist</li> </ul> The default value is <code>Parameter</code> .	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	<a href="#">Expression Set Custom Element Parameter Input[]</a>	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
resource Reference	String	Name of the expression set resource that's mapped to a token, such as Variable, Constant, or FiledAlias.	Required	59.0
expressionSet MessageToken	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": "110xx0000006PcLEAU"
    }
  ],
  "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	<a href="#">Context Definition Input</a>	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	<a href="#">Expression Set Version Input[]</a>	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
lookup TableName	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: <ul style="list-style-type: none"> <li>DecisionMatrix</li> <li>DecisionTable</li> </ul>	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
actionContext Code	String	The code of the action context used to log explainability for a specific execution of an expression set.   <b>Note:</b> To exclude decision explanations for expression set version steps from action logs, ensure that you exclude the <code>actionContextCode</code> and <code>explainabilitySpecName</code> 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-ddT'hh:mm:ss'Z.   <b>Note:</b> 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 <code>effectiveDate</code> 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 <code>effectiveDate</code> , the currently active version, Version 2, is executed.		
<code>explainabilitySpecName</code>	String	The name of the explainability specification that is used to log explainability for a specific execution of an expression set.   <b>Note:</b> To exclude decision explanations for expression set version steps from action logs, ensure that you exclude the <code>actionContextCode</code> and <code>explainabilitySpecName</code> properties from the payload.	Optional	55.0
<code>useDatesOnly</code>	String	Specifies that only the date portion (yyyy-mm-dd) of the value of <code>effectiveDate</code> field is to be used at the time of execution.	Optional	55.0
<code>versionNumber</code>	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
<code>expressionSet</code>	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 ( <code>true</code> ) or inactive ( <code>false</code> ).	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
showExpl Externally	Boolean	Indicates whether the decision explanation is exposed to community users ( <code>true</code> ) or not ( <code>false</code> ).	Required	58.0
startDate	String	Effective start date of the version.	Required	58.0
steps	<a href="#">Expression Set Version Step Input[]</a>	List of steps in an expression set.	Optional	58.0
variables	<a href="#">Expression Set Version Variable Input[]</a>	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	<p>Business Knowledge Model of the expression set.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> <li>• AiAccelerator</li> <li>• SubscriberChurn</li> <li>• Prediction</li> <li>• AssignBadgeToMember</li> <li>• AssignParameterValues</li> <li>• AutomatedClaims</li> <li>• ProcessingValidation</li> <li>• BreAggregator</li> <li>• BreAggregatorAssignment</li> <li>• ChangeMemberTier</li> <li>• CheckMember</li> <li>• BadgeAssignment</li> <li>• CreditPoints</li> <li>• Crud</li> <li>• DebitPoints</li> <li>• EvaluateQualification</li> <li>• EvaluateDisqualification</li> <li>• GetMemberAttributes</li> <li>• Values</li> <li>• GetMemberPointBalance</li> <li>• GetMemberPromotions</li> <li>• GetMemberTier</li> <li>• GetOutputsFromDecision</li> <li>• Matrix</li> <li>• GetOutputsFromDecision</li> <li>• Table</li> <li>• GetUserData</li> <li>• IncreaseUsage</li> <li>• ForCumulativePromotion</li> <li>• IssueVoucher</li> <li>• ListGroupCalculation</li> <li>• PriceAdjustmentMatrix</li> <li>• PriceList</li> <li>• RecordAlert</li> </ul>	Optional	58.0

Name	Type	Description	Required or Optional	Available Version
		<ul style="list-style-type: none"> <li>• RedeemVoucher</li> <li>• RunFlow</li> <li>• RunProgramProcess</li> <li>• SampleBusinessElementWithContext</li> <li>• SampleDynamicCustomElement</li> <li>• SendMail</li> <li>• TestCustomElement</li> <li>• UpdateCurrentValueForMemberAttribute</li> <li>• UpdatePointBalance</li> <li>• UpdateUsageForCumulativePromotion</li> <li>• VolumeDiscount</li> </ul>		
advancedCondition	<a href="#">Expression Set Advanced Condition Step Input</a>	Details of the advanced condition if the step is an advanced condition step.	Optional	58.0
aggregation	<a href="#">Expression Set Aggregation Step Input</a>	Aggregation details if the step is an aggregation step.	Optional	58.0
assignment	<a href="#">Expression Set Assignment Step Input</a>	Assignment details if the step is an assignment step.	Optional	58.0
conditionExpression	<a href="#">Expression Set Condition Expression Step Input</a>	Details of the condition if the step is a condition step.	Optional	58.0
customElement	<a href="#">Expression Set Custom Element Step Input</a>	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	<a href="#">Expression Set DES Token Mapping</a>	List of the token resource mappings of the failed explainability message template.	Optional	59.0

Name	Type	Description	Required or Optional	Available Version
lookupTable	<a href="#">Expression Set Lookup Table Step Input</a>	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	<a href="#">Expression Set DES Token Mapping</a>	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	<a href="#">Expression Set DES Token Mapping</a>	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 ( <code>true</code> ) or not ( <code>false</code> ).	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 ( <code>true</code> ) or not ( <code>false</code> ) for the Branch element type.	Optional	58.0
shouldExposeConditionDetails	Boolean	Indicates whether the decision explanation includes the condition details ( <code>true</code> ) or not ( <code>false</code> ) for the Condition element type.	Optional	58.0
shouldShowExplExternally	Boolean	Indicates whether the decision explanation is exposed to community users for the step ( <code>true</code> ) or not ( <code>false</code> ).	Optional	58.0
stepType	String	Step type of the expression set. Valid values are: <ul style="list-style-type: none"> <li>• <code>AdvancedCondition</code></li> </ul>	Required	58.0

Name	Type	Description	Required or Optional	Available Version
		<ul style="list-style-type: none"> <li>Advanced ListFilter—Available in version 59.0 and later.</li> <li>Branch</li> <li>BusinessKnowledgeModel</li> <li>Condition</li> <li>DefaultPath</li> <li>ListFilter—Available in version 59.0 and later.</li> <li>ListGroup—Available in version 59.0 and later.</li> <li>SubExpression</li> </ul>		
subExpression	<a href="#">Expression Set Sub Expression Step Input</a>	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: <ul style="list-style-type: none"> <li>ActionOutput</li> </ul>	Required	58.0

Name	Type	Description	Required or Optional	Available Version
		<ul style="list-style-type: none"> <li>• Boolean</li> <li>• Currency</li> <li>• Date</li> <li>• DateTime</li> <li>• DecisionMatrix</li> <li>• DecisionTable</li> <li>• Numeric</li> <li>• Percent</li> <li>• Subject</li> <li>• SubExpression</li> <li>• Text</li> </ul>		
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 ( <code>true</code> ) or not ( <code>false</code> ).	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: <ul style="list-style-type: none"> <li>• DecisionMatrix</li> <li>• DecisionTable</li> <li>• SubExpression</li> </ul>	Optional	58.0
name	String	Name of the variable.	Required	58.0
objectName	String	Name of the object when the variable is of the <code>sObject</code> type.	Optional	58.0
output	Boolean	Indicates whether the variable is output of an expression set version ( <code>true</code> ) or not ( <code>false</code> ).	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: <ul style="list-style-type: none"> <li>• Constant</li> </ul>	Required	58.0

Name	Type	Description	Required or Optional	Available Version
		<ul style="list-style-type: none"> <li>• Formula</li> <li>• Variable</li> </ul>		
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	<a href="#">BRE Guardrails Result[]</a>	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	<a href="#">Guardrails[]</a>	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
	<a href="#">Guardrail Current Value</a>	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: <ul style="list-style-type: none"> <li>• <code>RateLimit</code></li> <li>• <code>OrgValueLimit</code></li> </ul>	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
notification Supported	Boolean	Indicates whether the guardrail supports notifications ( <code>true</code> ) or not ( <code>false</code> ).	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	<a href="#">Current Value[]</a>	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	<a href="#">Error Result</a>	The details of the error.	Small, 55.0	55.0
results	<a href="#">Variable Map Output</a>	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	<a href="#">Business Rule Aggregation Results Output</a>	The result of the aggregation step in an expression set.	Small, 55.0	55.0
outputs	<a href="#">Rule Result[]</a>	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.  <b>Note:</b> 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: <ul style="list-style-type: none"><li>DecisionMatrix</li><li>DecisionTable</li><li>ExpressionSet</li></ul>	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	<a href="#">Context Definition Output</a>	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	<a href="#">Expression Set Error</a>	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: <ul style="list-style-type: none"><li>Failed</li><li>Success</li></ul>	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	<a href="#">Expression Set Version Output</a>	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	<a href="#">Expression Set Condition Criteria</a>	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
aggregated 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: <ul style="list-style-type: none"> <li>• Avg</li> <li>• Max</li> <li>• Min</li> <li>• Sum</li> </ul>	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
		<ul style="list-style-type: none"> <li>Contains</li> <li>DoesNotContain</li> <li>Equals</li> <li>GreaterThanOrEquals</li> <li>GreaterThan</li> <li>IsNull</li> <li>IsNotNull</li> <li>LessThan</li> <li>LessThanOrEquals</li> <li>NotEqualTo</li> </ul>		
sequence Number	Integer	Sequence number of the condition in the advanced condition.	Small, 58.0	58.0
sourceField Name	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: <ul style="list-style-type: none"> <li>Formula</li> <li>Literal</li> <li>Parameter</li> </ul>	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
result Parameter	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 ( <code>true</code> ) or not ( <code>false</code> ).	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 ( <code>true</code> ) or not ( <code>false</code> ).	Small, 58.0	58.0
type	String	Type of custom element parameter. Valid values are: <ul style="list-style-type: none"> <li>• Formula</li> <li>• Literal</li> <li>• Lookup</li> <li>• Parameter</li> <li>• Picklist</li> </ul> The default value is <code>Parameter</code> .	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	<a href="#">Expression Set Custom Element Parameter</a>	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: <ul style="list-style-type: none"> <li>DecisionMatrix</li> <li>DecisionTable</li> </ul>	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	<a href="#">Dependency Detail Output[]</a>	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 ( <code>true</code> ) or inactive ( <code>false</code> ).	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
showExpl Externally	Boolean	Indicates whether the decision explanation is exposed to community users ( <code>true</code> ) or not ( <code>false</code> ).	Small, 58.0	58.0
startDate	String	Effective start date of the expression set version.	Small, 58.0	58.0
steps	<a href="#">Expression Set Version Step</a>	List of steps in an expression set.	Small, 58.0	58.0

Property Name	Type	Description	Filter Group and Version	Available Version
variables	<a href="#">Expression Set Version Variable</a>	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	<p>Business Knowledge Model of the expression set.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> <li>• AiAcceleratorSubscriberChurnPrediction</li> <li>• AssignBadgeToMember</li> <li>• AssignParameterValues</li> <li>• AutomatedClaimsProcessingValidation</li> <li>• BreAggregator</li> <li>• BreAggregatorAssignment</li> <li>• ChangeMemberTier</li> <li>• CheckMemberBadgeAssignment</li> <li>• CreditPoints</li> <li>• Crud</li> <li>• DebitPoints</li> <li>• EvaluateQualification</li> <li>• EvaluateDisqualification</li> <li>• GetMemberAttributesValues</li> <li>• GetMemberPointBalance</li> <li>• GetMemberPromotions</li> <li>• GetMemberTier</li> <li>• GetOutputsFromDecisionMatrix</li> <li>• GetOutputsFromDecisionTable</li> <li>• GetUserData</li> </ul>	Small, 58.0	58.0

Property Name	Type	Description	Filter Group and Version	Available Version
		<ul style="list-style-type: none"> <li>• IncreaseUsageForCumulativePromotion</li> <li>• IssueVoucher</li> <li>• ListGroupCalculation</li> <li>• PriceList</li> <li>• RecordAlert</li> <li>• RedeemVoucher</li> <li>• RedeemVoucher</li> <li>• RunFlow</li> <li>• RunProgramProcess</li> <li>• SampleBusinessElementWithContext</li> <li>• SampleDynamicCustomElement</li> <li>• SendMail</li> <li>• TestCustomElement</li> <li>• UpdateCurrentValueForMemberAttribute</li> <li>• UpdatePointBalance</li> <li>• UpdateUsageForCumulativePromotion</li> <li>• VolumeDiscount</li> </ul>		
advanced Condition	<a href="#">Expression Set Advanced Condition Step</a>	Details of the advanced condition in case of an advanced condition step.	Small, 58.0	58.0
aggregation	<a href="#">Expression Set Aggregation Step</a>	Details of the aggregation step in case of an aggregation step.	Small, 58.0	58.0
assignment	<a href="#">Expression Set Assignment Step</a>	Details of the assignment step in case of an assignment step.	Small, 58.0	58.0
condition Expression	<a href="#">Expression Set Condition Expression Step</a>	Details of the condition step in case of a condition step.	Small, 58.0	58.0
customElement	<a href="#">Expression Set Custom Element Step</a>	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
failed Explainer Template	String	Name of the failed explainability message template.	Small, 58.0	58.0
failedMessage TokenMappings	<a href="#">Expression Set DES Token Mapping</a>	List of the token resource mappings of the failed explainability message template.	Optional	59.0
lookupTable	<a href="#">Expression Set Lookup Table Step</a>	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
noResult Explainer Template	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
noResult MessageToken Mappings	<a href="#">Expression Set DES Token Mapping</a>	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
passed Explainer Template	String	Name of the passed explainability message template.	Small, 58.0	58.0
passedMessage TokenMappings	<a href="#">Expression Set DES Token Mapping</a>	List of the token resource mappings of the passed explainability message template.	Small, 59.0	59.0
result Included	Boolean	Indicates whether to include the step output in the expression set result ( <code>true</code> ) or not ( <code>false</code> ).	Small, 58.0	58.0
sequence Number	Integer	Sequence number of the step in the expression set version.	Small, 58.0	58.0
shouldExpose Condition Details	Boolean	Indicates whether the decision explanation includes the condition details ( <code>true</code> ) or not ( <code>false</code> ) for the condition element type.	Small, 58.0	58.0
should ExposeExec PathMsgOnly	Boolean	Indicates whether the decision explanation includes details of the executed path only ( <code>true</code> ) or not ( <code>false</code> ) for the branch element type.	Small, 58.0	58.0
should ShowExpl Externally	Boolean	Indicates whether the decision explanation is exposed to community users for the step ( <code>true</code> ) or not ( <code>false</code> ).	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: <ul style="list-style-type: none"> <li>AdvancedCondition</li> <li>Branch</li> <li>BusinessKnowledgeModel</li> <li>Condition</li> <li>DefaultPath</li> <li>SubExpression</li> </ul>	Small, 58.0	58.0
subExpression	<a href="#">Expression Set</a> <a href="#">SubExpression Step</a>	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. <ul style="list-style-type: none"> <li>ActionOutput</li> <li>Boolean</li> <li>Currency</li> <li>Date</li> <li>DateTime</li> <li>DecisionMatrix</li> <li>DecisionTable</li> <li>Numeric</li> <li>Percent</li> <li>Subject</li> <li>SubExpression</li> <li>Text</li> </ul>	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 ( <code>true</code> ) or not ( <code>false</code> ).	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: <ul style="list-style-type: none"> <li>• <code>DecisionMatrix</code></li> <li>• <code>DecisionTable</code></li> <li>• <code>SubExpression</code></li> </ul>	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 <code>sObject</code> type.	Small, 58.0	58.0
output	Boolean	Indicates whether the variable is the output of an expression set version ( <code>true</code> ) or not ( <code>false</code> ).	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: <ul style="list-style-type: none"> <li>• <code>Constant</code></li> <li>• <code>Formula</code></li> <li>• <code>Variable</code></li> </ul>	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	<a href="#">Error Result</a>	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	<a href="#">Variable Map Output</a>	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/v**55.0**/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
<code>description</code>	<b>Field Type</b> string <b>Description</b> The description of an expression set definition.
<code>executionScale</code>	<b>Field Type</b> ExpsSetExecutionScale (enumeration of type string) <b>Description</b> Specifies the scale of the inputs that an expression set processes. The scale determines where the expression set is executed. Valid values are: <ul style="list-style-type: none"><li>• High</li></ul>

Field Name	Description
	<ul style="list-style-type: none"> <li>• <code>Low</code></li> </ul> <p>Available in API version 61.0 and later.</p>
<code>interfaceSourceType</code>	<p><b>Field Type</b> ExpsSetInterfaceSourceType (enumeration of type string)</p> <p><b>Description</b> The interface source type designed by the consuming cloud that's making a customized expression set builder available to its users.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> <li>• <code>Constraint</code> (Available in API version 62.0 and later).</li> <li>• <code>DiscoveryProcedure</code> (Available in API version 61.0 and later).</li> <li>• <code>EventOrchestration</code> (Available in API version 61.0 and later).</li> <li>• <code>PricingProcedure</code></li> <li>• <code>QualificationProcedure</code></li> <li>• <code>RatingDiscoveryProcedure</code> (Available in API version 61.0 and later).</li> <li>• <code>Sample</code></li> </ul> <p>Available in API version 59.0 and later.</p>
<code>label</code>	<p><b>Field Type</b> string</p> <p><b>Description</b> Required.</p> <p>The UI label of an expression set definition.</p>
<code>processType</code>	<p><b>Field Type</b> ExpsSetProcessType (enumeration of type string)</p> <p><b>Description</b> The process type that uses the expression set rule.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> <li>• <code>Bre</code></li> <li>• <code>GpaCalculation</code></li> <li>• <code>PlanCostCalculation</code></li> <li>• <code>RatingDiscovery</code></li> <li>• <code>StudentSuccess</code></li> <li>•  <b>Note:</b> 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.</li> </ul>


Field Name	Description
resourceInitializationType	<p><b>Field Type</b> ResourceInitializationType (enumeration of type string)</p> <p><b>Description</b> Indicates whether the initial value of expression set variables and context tags is null or a default value.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> <li>• Default</li> <li>• Off</li> </ul> <p>Available in API version 64.0 and later.</p>
template	<p><b>Field Type</b> boolean</p> <p><b>Description</b> Defines whether an expression set is a template or not.</p>
versions	<p><b>Field Type</b> <a href="#">ExpressionSetDefinitionVersion</a>[]</p> <p><b>Description</b> Represents an array of expression set version definitions in an expression set.</p> <p> <b>Note:</b> This array must contain at least one version.</p>

## ExpressionSetDefinitionVersion

Represents a definition of an expression set version.

Field Name	Description
decimalScale	<p><b>Field Type</b> integer</p> <p><b>Description</b> Number of decimal places to be used in the results of calculation steps that involve context variables.</p>
description	<p><b>Field Type</b> string</p> <p><b>Description</b> Describes the version of an expression set definition.</p>
endDate	<p><b>Field Type</b> dateTime</p>

Field Name	Description
	<b>Description</b> The date until which the expression set definition is available for use.
expressionSetDefinition	<b>Field Type</b> string <b>Description</b> The full name of an expression set definition.
label	<b>Field Type</b> string <b>Description</b> Required. The UI label of an expression set definition.
rank	<b>Field Type</b> int <b>Description</b> The rank of the <code>Expression Set Definition Version</code> . 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	<b>Field Type</b> boolean <b>Description</b> Indicates whether the decision explanation is exposed to external users ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> . Available in API version 56.0 and later.
startDate	<b>Field Type</b> dateTime <b>Description</b> Required. The date from when the expression set definition is available for use.
status	<b>Field Type</b> ExpSetStatus (enumeration of type string) <b>Description</b> Required. The status of an expression set definition. Possible values are: <ul style="list-style-type: none"> <li>• <code>Active</code></li> </ul>

Field Name	Description
	<ul style="list-style-type: none"> <li>• Draft</li> <li>• Inactive</li> <li>• InvalidDraft</li> <li>• Obsolete</li> </ul>
steps	<p><b>Field Type</b> ExpressionSetStep[]</p> <p><b>Description</b> Represents an array of steps created in an expression set version.</p>
uiTier	<p><b>Field Type</b> boolean</p> <p><b>Description</b> Indicates whether the API call originated from the design time builder or a package.</p> <p> <b>Note:</b> This field is for internal use only.</p>
variables	<p><b>Field Type</b> ExpressionSetVariable[]</p> <p><b>Description</b> Represents an array of variables in an expression set version.</p>
versionNumber	<p><b>Field Type</b> int</p> <p><b>Description</b> Required.  The version number of an expression set definition.</p>

## ExpressionSetStep

Represents a step in an expression set version.

Field Name	Description
actionType	<p><b>Field Type</b> BusinessKnowledgeModel (enumeration of type string)</p> <p><b>Description</b> Specifies the type of action this step executes.  Valid values are:</p> <ul style="list-style-type: none"> <li>• AiAcceleratorSubscriberChurnPrediction</li> <li>• ApexAction</li> <li>• ApexListAction (Available in API version 64.0 and later.)</li> </ul>

Field Name	Description
	<ul style="list-style-type: none"> <li>AssetDiscovery</li> <li>AssignBadgeToMember</li> <li>AssignParameterValues</li> <li>AssignmentElement</li> <li>BaseRate</li> <li>BreAggregator</li> <li>BreAggregatorAssignment</li> <li>BreakdownLineMapping (Available in API version 64.0 and later.)</li> <li>ChangeMemberTier</li> <li>CheckMemberBadgeAssignment</li> <li>CommercePricing (Available in API version 62.0 and later.)</li> <li>ComplianceCheck</li> <li>ComplianceControlLog (Available in API version 62.0 and later.)</li> <li>Constraint (Available in API version 64.0 and later.)</li> <li>CreditPoints</li> <li>Crud</li> <li>DebitPoints</li> <li>DerivedPricing</li> <li>DiscountDistributionService</li> <li>DiscoverySettings (Available in API version 64.0 and later.)</li> <li>EvaluateCategoryDisqualification (Available in API version 62.0 and later.)</li> <li>EvaluateCategoryQualification (Available in API version 62.0 and later.)</li> <li>FormulaBasedRating (Available in API version 62.0 and later.)</li> <li>FormulaBasedPricing</li> <li>GetMemberAttributesValues</li> <li>GetMemberPointBalance</li> <li>GetMemberPromotions</li> <li>GetMemberTier</li> <li>GetOutputsFromDecisionMatrix</li> <li>GetOutputsFromDecisionTable</li> <li>GroupingAndAggregateRating (Available in API version 62.0 and later.)</li> <li>IncreaseUsageForCumulativePromotion</li> <li>IntegrationOrchestration</li> <li>IssueVoucher</li> <li>ManualRatingDiscount (Available in API version 62.0 and later.)</li> <li>MapProduct</li> <li>MinimumPrice (Available in API version 62.0 and later.)</li> </ul>

Field Name	Description
	<ul style="list-style-type: none"> <li>• MultiRecipientProductQualification (Available in API version 64.0 and later.)</li> <li>• NegotiatedBaseRate (Available in API version 64.0 and later.)</li> <li>• NegotiatedRateCardEntryResolution (Available in API version 64.0 and later.)</li> <li>• NegotiatedTierAdjustment (Available in API version 64.0 and later.)</li> <li>• NegotiatedVolumeAdjustment (Available in API version 64.0 and later.)</li> <li>• PriceGuidance (Available in API version 64.0 and later.)</li> <li>• PricingSettings</li> <li>• PromotionsDiscount</li> <li>• RateAdjustmentByAttributeResolution (Available in API version 62.0 and later.)</li> <li>• RateAdjustmentByTierResolution (Available in API version 62.0 and later.)</li> <li>• RateAdjustmentMatrix (Available in API version 62.0 and later.)</li> <li>• RateAssignment (Available in API version 62.0 and later.)</li> <li>• RateCardEntryResolution (Available in API version 62.0 and later.)</li> <li>• RateCardResolution (Available in API version 62.0 and later.)</li> <li>• RatingAttributeDiscount</li> <li>• RatingRoundingValues (Available in API version 62.0 and later.)</li> <li>• RatingSetting</li> <li>• RatingTierDiscount</li> <li>• RatingVolumeDiscount</li> <li>• RecordAction</li> <li>• RoundingValues</li> <li>• RuleFetch</li> <li>• RunFlow</li> <li>• RunProgramProcess</li> <li>• SampleCustomElementWithExpressionAndListFilter</li> <li>• StopPricing</li> <li>• StopRating (Available in API version 62.0 and later.)</li> <li>• TermGpaCalculation (Available in API version 64.0 and later.)</li> <li>• TermGpaReporting (Available in API version 64.0 and later.)</li> <li>• TestCustomElement</li> <li>• UpdateCurrentValueForMemberAttribute</li> <li>• UpdatePointBalance</li> <li>• UpdateUsageForCumulativePromotion</li> <li>• UpsertRecord (Available in API version 64.0 and later.)</li> <li>• VolumeTierDiscount</li> </ul>

Field Name	Description
advancedCondition	<b>Field Type</b> <a href="#">ExpressionSetAdvancedCondition</a> <b>Description</b> Represents an advanced condition step.
aggregation	<b>Field Type</b> <a href="#">ExpressionSetAggregation</a> <b>Description</b> Represents an aggregation step.
assignment	<b>Field Type</b> <a href="#">ExpressionSetAssignment</a> <b>Description</b> Represents an assignment step.
conditionExpression	<b>Field Type</b> <a href="#">ExpressionSetConditionExpression</a> <b>Description</b> Represents a condition step.
customElement	<b>Field Type</b> <a href="#">ExpressionSetCustomElement</a> <b>Description</b> Represents a custom element step that contains the input and output mappings. Available in API version 56.0 and later.
decisionTable	<b>Field Type</b> <a href="#">ExpressionSetDecisionTable</a> <b>Description</b> Represents a decision matrix or decision table step.
description	<b>Field Type</b> string <b>Description</b> Describes an expression set definition version step.
failedExplainerTemplate	<b>Field Type</b> string <b>Description</b> 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	<p><b>Field Type</b> ExplainabilityMessageTemplateTokenMapping (enumeration of type string)</p> <p><b>Description</b> List of the token resource mappings of the failed explainability message template. Valid values are:</p> <ul style="list-style-type: none"> <li>• <code>expressionSetMessageToken</code></li> <li>• <code>resourceReference</code></li> </ul> <p>Available in API version 59.0 and later.</p>
label	<p><b>Field Type</b> string</p> <p><b>Description</b> Required.  The UI label of an expression set definition version step.</p>
name	<p><b>Field Type</b> string</p> <p><b>Description</b> Required.  The full name of an expression set definition version step.</p>
noResultExplainerTemplate	<p><b>Field Type</b> string</p> <p><b>Description</b> 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.</p>
noResultMessageTokenMappings	<p><b>Field Type</b> ExplainabilityMessageTemplateTokenMapping (enumeration of type string)</p> <p><b>Description</b> List of the token resource mappings of the no result explainability message template. Valid values are:</p> <ul style="list-style-type: none"> <li>• <code>expressionSetMessageToken</code></li> <li>• <code>resourceReference</code></li> </ul> <p>Available in API version 59.0 and later.</p>
parentStep	<p><b>Field Type</b> string</p>

Field Name	Description
	<b>Description</b> The name of the parent step in an expression set definition version that's associated with a step.
passedExplainerTemplate	<b>Field Type</b> string <b>Description</b> The explainability message template that's used when the result type of a condition step in an expression set is Passed.
passedMessageTokenMappings	<b>Field Type</b> ExplainabilityMessageTemplateTokenMapping (enumeration of type string) <b>Description</b> List of the token resource mappings of the passed explainability message template. Valid values are: <ul style="list-style-type: none"> <li>• expressionSetMessageToken</li> <li>• resourceReference</li> </ul> Available in API version 59.0 and later.
resultIncluded	<b>Field Type</b> boolean <b>Description</b> Indicates whether the step output must be included in the expression result (true) or not (false).
sequenceNumber	<b>Field Type</b> int <b>Description</b> Required. The sequence number of a step in an expression set definition version.
shouldExposExecPathMsgOnly	<b>Field Type</b> boolean <b>Description</b> Indicates whether the message in the explainability message template is exposed for only the branch path that was run.
shouldExposeConditionDetails	<b>Field Type</b> boolean <b>Description</b> Indicates whether the details of the condition are shown in the decision explanation.

Field Name	Description
<code>shouldShowExplExternally</code>	<b>Field Type</b> boolean <b>Description</b> Indicates whether the decision explanations are shown to external users.
<code>stepType</code>	<b>Field Type</b> ExpsSetStepType (enumeration of type string) <b>Description</b> Required. Specifies the type of step in an expression set definition version. Valid values are: <ul style="list-style-type: none"> <li>• <code>AdvancedCondition</code></li> <li>• <code>Branch</code></li> <li>• <code>BusinessKnowledgeModel</code></li> <li>• <code>Condition</code></li> <li>• <code>DefaultPath</code></li> <li>• <code>SubExpression</code></li> </ul>
<code>subExpression</code>	<b>Field Type</b> <a href="#">ExpressionSetSubExpression</a> <b>Description</b> Represents a sub expression step.

### ExpressionSetAdvancedCondition

Represents an advanced condition step.

Field Name	Description
<code>conditionLogic</code>	<b>Field Type</b> string <b>Description</b> Required. The condition that's defined for an advanced condition.
<code>criteria</code>	<b>Field Type</b> <a href="#">ExpressionSetConditionCriteria</a> [] <b>Description</b> Represents an array of criteria defined in the advanced condition.

Field Name	Description
errorMessage	<b>Field Type</b> string <b>Description</b> An error message for a failed advanced condition.
resultParameter	<b>Field Type</b> string <b>Description</b> An expression set definition version variable associated with the result of a step.
successMessage	<b>Field Type</b> string <b>Description</b> A success message for a successful advanced condition.

### ExpressionSetConditionCriteria

Represents a criterion defined in an advanced condition.

Field Name	Description
operator	<b>Field Type</b> ExpsSetConditionOperator (enumeration of type string) <b>Description</b> Required. Specifies the operator for evaluating an expression. Valid values are: <ul style="list-style-type: none"><li>• Contains</li><li>• DoesNotContain</li><li>• Equals</li><li>• GreaterThan</li><li>• GreaterThanOrEquals</li><li>• IsNull</li><li>• IsNotNull</li><li>• LessThan</li><li>• LessThanOrEquals</li><li>• NoEquals</li></ul>
sequenceNumber	<b>Field Type</b> int

Field Name	Description
	<b>Description</b> Required. The position of the condition in a step that contains multiple conditions.
sourceFieldName	<b>Field Type</b> string <b>Description</b> Required. The expression set definition version variable associated with the result of a condition criterion.
value	<b>Field Type</b> string <b>Description</b> Specifies the condition of a criterion.
valueType	<b>Field Type</b> ExpsSetValueType (enumeration of type string) <b>Description</b> Specifies the type of value. Valid values are: <ul style="list-style-type: none"> <li>• Formula</li> <li>• Literal</li> <li>• Lookup</li> <li>• Parameter</li> <li>• Picklist</li> </ul>

## ExpressionSetAggregation

Represents an aggregation step.

Field Name	Description
aggregatedParameter	<b>Field Type</b> string <b>Description</b> Required. The expression set definition version variable associated with the result of a condition criterion.

Field Name	Description
aggregateFunction	<p><b>Field Type</b> ExpsSetAggregationFunction (enumeration of type string)</p> <p><b>Description</b> Required. Specifies the aggregation function used in a step. Valid values are:</p> <ul style="list-style-type: none"> <li>• Avg</li> <li>• Max</li> <li>• Min</li> <li>• Sum</li> </ul>
expression	<p><b>Field Type</b> string</p> <p><b>Description</b> Required. Specifies the expression of an aggregation.</p>

## ExpressionSetAssignment

Represents an assignment step.

Field Name	Description
aggregatedParameter	<p><b>Field Type</b> string</p> <p><b>Description</b> Required. The expression set definition version variable associated with a step detail.</p>
expression	<p><b>Field Type</b> string</p> <p><b>Description</b> Required. The expression that's defined for a step.</p>

## ExpressionSetConditionExpression

Represents a condition in a condition step.

Field Name	Description
errorMessage	<b>Field Type</b> string <b>Description</b> An error message for a failed condition.
expression	<b>Field Type</b> string <b>Description</b> Required. The expression that's defined for a step.
resultParameter	<b>Field Type</b> string <b>Description</b> The expression set definition version variable associated with the result of a step.
successMessage	<b>Field Type</b> string <b>Description</b> 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	<b>Field Type</b> <a href="#">ExpressionSetElementParameter[]</a> <b>Description</b> 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	<b>Field Type</b> boolean <b>Description</b> Required.

Field Name	Description
	Indicates whether the custom element parameter is input ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>true</code> .
name	<b>Field Type</b> string <b>Description</b> Required. The name of the custom element parameter.
output	<b>Field Type</b> boolean <b>Description</b> Required. Indicates whether the custom element parameter is output ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>true</code> .
type	<b>Field Type</b> ExpsSetValueType (enumeration of type string) <b>Description</b> The type of custom element parameter. Values are: <ul style="list-style-type: none"> <li>• Formula</li> <li>• Literal</li> <li>• Lookup</li> <li>• Parameter</li> <li>• PickList</li> </ul> The default value is <code>Parameter</code> .
value	<b>Field Type</b> string <b>Description</b> Required. The name of the expression set variable.

## ExpressionSetDecisionTable

Represents a decision table or decision matrix in a step.

Field Name	Description
decisionTableName	<b>Field Type</b> string <b>Description</b> Required. The decision matrix or decision table name used in a step.
mappings	<b>Field Type</b> <a href="#">ExpressionSetElementParameter[]</a> <b>Description</b> The mapping information between various parameters in an ExpressionSetDecisionTable. Available in API version 59.0 and later.
type	<b>Field Type</b> string <b>Description</b> 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	<b>Field Type</b> string <b>Description</b> Required. The sub expression name used in a step.
mappings	<b>Field Type</b> <a href="#">ExpressionSetElementParameter[]</a> <b>Description</b> 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	<p><b>Field Type</b> boolean</p> <p><b>Description</b> Indicates whether a variable stores a collection of values (<code>true</code>) or not (<code>false</code>).</p>
dataType	<p><b>Field Type</b> ExpsSetDataType (enumeration of type string)</p> <p><b>Description</b> Required. The data type of an expression set variable. Valid values are:</p> <ul style="list-style-type: none"> <li>• ActionOutput</li> <li>• Boolean</li> <li>• Currency</li> <li>• Date</li> <li>• DateTime</li> <li>• DecisionMatrix</li> <li>• DecisionTable</li> <li>• Numeric</li> <li>• Percent</li> <li>• Subject</li> <li>• SubExpression</li> <li>• Text</li> </ul>
decimalPlaces	<p><b>Field Type</b> int</p> <p><b>Description</b> The decimal digits in the currency, number, or percent data type for an expression set variable.</p>
description	<p><b>Field Type</b> string</p> <p><b>Description</b> The description of the variable used in an expression set.</p>
fields	<p><b>Field Type</b> <a href="#">ExpressionSetVariableField</a> []</p> <p><b>Description</b> Represents an array of fields in an object that is used as a variable in an expression set.</p>

Field Name	Description
input	<p><b>Field Type</b> boolean</p> <p><b>Description</b> Indicates whether an expression set variable is used as an input (<code>true</code>) in an expression or not (<code>false</code>).</p>
lookupName	<p><b>Field Type</b> string</p> <p><b>Description</b> The API name of a decision matrix, a decision table, or a sub expression.</p>
lookupType	<p><b>Field Type</b> ExpsSetVariableLookupType (enumeration of type string)</p> <p><b>Description</b> The type of the lookup used in an expression set definition. Valid values are:</p> <ul style="list-style-type: none"> <li>• <code>DecisionMatrix</code></li> <li>• <code>DecisionTable</code></li> <li>• <code>SubExpression</code></li> </ul>
name	<p><b>Field Type</b> string</p> <p><b>Description</b> Required.  The full name of the variable used in an expression set definition.</p>
objectName	<p><b>Field Type</b> string</p> <p><b>Description</b> The name of the sObject.</p>
output	<p><b>Field Type</b> boolean</p> <p><b>Description</b> Indicates whether an expression set variable is used as an output in an expression(<code>true</code>) or not (<code>false</code>).</p>
resultStep	<p><b>Field Type</b> string</p> <p><b>Description</b> The step that produces the expression set variable.</p>

Field Name	Description
type	<p><b>Field Type</b> ExpsSetVariableType (enumeration of type string)</p> <p><b>Description</b> Required. The type of variable in an expression set definition. Valid values are:</p> <ul style="list-style-type: none"> <li>• Constant</li> <li>• ContextDynamicAttributeTag (Available in API version 62.0 and later.)</li> <li>• ExecutableContextDefinitionTag (Available in API version 62.0 and later.)</li> <li>• Formula</li> <li>• Variable</li> </ul>
value	<p><b>Field Type</b> string</p> <p><b>Description</b> Represents a constant value or a formula.</p> <p> <b>Note:</b> It stores the default value of a variable.</p>

## ExpressionSetVariableField

Represents a definition of a field in an object that is used as a variable in an expression set.

Field Name	Description
dataType	<p><b>Field Type</b> ExpsSetDataType (enumeration of type string)</p> <p><b>Description</b> Required. Specifies the type of data stored in an expression set variable. Valid values are:</p> <ul style="list-style-type: none"> <li>• ActionOutput</li> <li>• Boolean</li> <li>• Currency</li> <li>• Date</li> <li>• DateTime</li> <li>• DecisionMatrix</li> <li>• DecisionTable</li> <li>• Numeric</li> <li>• Percent</li> </ul>

Field Name	Description
	<ul style="list-style-type: none"> <li>• <code>Subject</code></li> <li>• <code>SubExpression</code></li> <li>• <code>Text</code></li> </ul>
<code>decimalPlaces</code>	<p><b>Field Type</b> <code>int</code></p> <p><b>Description</b> The decimal digits in the currency, number, or percent data type for an expression set variable.</p>
<code>fields</code>	<p><b>Field Type</b> <a href="#">ExpressionSetVariableField</a> []</p> <p><b>Description</b> Represents an array of fields in an object that is used as a variable in an expression set.</p>
<code>lookupName</code>	<p><b>Field Type</b> <code>string</code></p> <p><b>Description</b> The API name of a decision matrix, a decision table, or a sub expression.</p>
<code>lookupType</code>	<p><b>Field Type</b> <code>ExpsSetVariableLookupType</code> (enumeration of type <code>string</code>)</p> <p><b>Description</b> Required.  The type of lookup used in an expression set definition.  Valid values are:</p> <ul style="list-style-type: none"> <li>• <code>DecisionMatrix</code></li> <li>• <code>DecisionTable</code></li> <li>• <code>SubExpression</code></li> </ul>
<code>name</code>	<p><b>Field Type</b> <code>string</code></p> <p><b>Description</b> Required.  The full name of the field used in an expression set variable.</p>
<code>objectName</code>	<p><b>Field Type</b> <code>string</code></p> <p><b>Description</b> The name of the <code>sObject</code>.</p>

## 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>
        <aggregatedParameter>result</aggregatedParameter>
        <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>
    </steps>
  </versions>
</ExpressionSetDefinition>
```

```

    </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>
<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>
    </steps>

```

```

    <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
<code>description</code>	<p><b>Field Type</b> string</p> <p><b>Description</b> Required. Description of the expression set message token.</p>
<code>developerName</code>	<p><b>Field Type</b> string</p> <p><b>Description</b> Required. Developer name of the expression set message token.</p>
<code>masterLabel</code>	<p><b>Field Type</b> string</p> <p><b>Description</b> Required. A user-friendly name for ExpressionSetMessageToken, which is defined when the ExpressionSetMessageToken is created.</p>

## 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	<b>Field Type</b> ExpsSetObjectDataType (enumeration of type string) <b>Description</b> Required. The data type of the object alias. Values are: <ul style="list-style-type: none"><li>JSON</li><li>sObject</li></ul>
mappings	<b>Field Type</b> <a href="#">ExpressionSetObjectAliasField[]</a>

Field Name	Description
	<b>Description</b> The mapping between a source field and its corresponding field alias.
objectApiName	<b>Field Type</b> string <b>Description</b> 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	<b>Field Type</b> ExpsSetProcessType (enumeration of type string) <b>Description</b> 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: <ul style="list-style-type: none"> <li>• Bre</li> <li>•  <b>Note:</b> 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.</li> </ul>

## ExpressionSetObjectAliasField

The fields associated with the source object for which the object alias is created.

Field Name	Description
fieldAlias	<b>Field Type</b> string <b>Description</b> Required. The field alias associated with the source field name.
sourceFieldName	<b>Field Type</b> string <b>Description</b> 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
<code>actionType</code>	InvokableActionType (enumeration of type string)	Required. The action type. Additional valid values only for Expression Set include: <ul style="list-style-type: none"> <li><code>runExpressionSet</code>—Invoke an active expression set. This value is available in API version 55.0 and later.</li> </ul>

## 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.

### [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.

### EDITIONS

Available in: Lightning Experience

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

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
<code>DeveloperName</code>	<b>Type</b> string  <b>Properties</b> Filter, Group, Sort

Field	Details
	<b>Description</b> The developer name of the expression set definition.
FullName	<b>Type</b> string <b>Properties</b> Create, Group, Nillable <b>Description</b> 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	<b>Type</b> picklist <b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update <b>Description</b> Specifies the scale of the input that an expression set processes. The scale determines where the expression set is executed. Possible values are: <ul style="list-style-type: none"> <li>• High</li> <li>• Low</li> </ul>
Language	<b>Type</b> picklist <b>Properties</b> Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort <b>Description</b> The language in which the expression set definition is created. Possible values are: <ul style="list-style-type: none"> <li>• da—Danish</li> <li>• de—German</li> <li>• en_US—English</li> <li>• es—Spanish</li> <li>• es_MX—Spanish (Mexico)</li> <li>• fi—Finnish</li> <li>• fr—French</li> <li>• it—Italian</li> <li>• ja—Japanese</li> <li>• ko—Korean</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>nl_NL—Dutch</li> <li>no—Norwegian</li> <li>pt_BR—Portuguese (Brazil)</li> <li>ru—Russian</li> <li>sv—Swedish</li> <li>th—Thai</li> <li>zh_CN—Chinese (Simplified)</li> <li>zh_TW—Chinese (Traditional)</li> </ul>
ManageableState	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Indicates the manageable state of the specified component that is contained in a package. Possible values are:</p> <ul style="list-style-type: none"> <li>beta—Managed-Beta</li> <li>deleted—Managed-Proposed-Deleted</li> <li>deprecated—Managed-Proposed-Deprecated</li> <li>deprecatedEditable—SecondGen-Installed-Deprecated</li> <li>installed—Managed-Installed</li> <li>installedEditable—SecondGen-Installed-Editable</li> <li>released—Managed-Released</li> <li>unmanaged—Unmanaged</li> </ul>
MasterLabel	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> The label of the expression set definition.</p>
Metadata	<p><b>Type</b> complexvalue</p> <p><b>Properties</b> Create, Nillable, Update</p> <p><b>Description</b> Expression set definition metadata.</p>

Field	Details
NamespacePrefix	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The namespace prefix associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix.</p>

## 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	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> The developer name of the expression set definition version.</p>
ExpressionSetDefinitionId	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> The expression set definition record associated with this expression set definition version.  This field is a relationship field.</p> <p><b>Relationship Name</b> ExpressionSetDefinition</p> <p><b>Relationship Type</b> Lookup</p>

Field	Details
	<b>Refers To</b> ExpressionSetDefinition
FullName	<b>Type</b> string  <b>Properties</b> Create, Group, Nillable  <b>Description</b> 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	<b>Type</b> picklist  <b>Properties</b> Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort  <b>Description</b> The language in which this expression set definition version is created.  Possible values are: <ul style="list-style-type: none"> <li>• da—Danish</li> <li>• de—German</li> <li>• en_US—English</li> <li>• es—Spanish</li> <li>• es_MX—Spanish (Mexico)</li> <li>• fi—Finnish</li> <li>• fr—French</li> <li>• it—Italian</li> <li>• ja—Japanese</li> <li>• ko—Korean</li> <li>• nl_NL—Dutch</li> <li>• no—Norwegian</li> <li>• pt_BR—Portuguese (Brazil)</li> <li>• ru—Russian</li> <li>• sv—Swedish</li> <li>• th—Thai</li> <li>• zh_CN—Chinese (Simplified)</li> <li>• zh_TW—Chinese (Traditional)</li> </ul>
ManageableState	<b>Type</b> picklist

Field	Details
	<p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Indicates the manageable state of the specified component that is contained in a package. Possible values are:</p> <ul style="list-style-type: none"> <li>• beta—Managed-Beta</li> <li>• deleted—Managed-Proposed-Deleted</li> <li>• deprecated—Managed-Proposed-Deprecated</li> <li>• deprecatedEditable—SecondGen-Installed-Deprecated</li> <li>• installed—Managed-Installed</li> <li>• installedEditable—SecondGen-Installed-Editable</li> <li>• released—Managed-Released</li> <li>• unmanaged—Unmanaged</li> </ul>
MasterLabel	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> The label of the expression set definition version.</p>
Metadata	<p><b>Type</b> complexvalue</p> <p><b>Properties</b> Create, Nillable, Update</p> <p><b>Description</b> Expression set definition version metadata.</p>
NamespacePrefix	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The namespace prefix associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix.</p>
Status	<p><b>Type</b> picklist</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p>

Field	Details
	<b>Description</b> Indicates the status of the expression set definition version. Possible values are: <ul style="list-style-type: none"> <li>• Active</li> <li>• Draft</li> <li>• Inactive</li> <li>• InvalidDraft</li> <li>• Obsolete</li> </ul> The default value is Draft.
VersionNumber	<b>Type</b> int <b>Properties</b> Filter, Group, Sort <b>Description</b> 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	<b>Type</b> picklist <b>Properties</b> Defaulted on create, Filter, Group, Restricted picklist, Sort

Field	Details
	<p><b>Description</b></p> <p>Specifies the data type of the object alias. This is a required field.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• JSON</li> <li>• sObject</li> </ul> <p>The default value is sObject.</p>
DeveloperName	<p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Filter, Group, Sort</p> <p><b>Description</b></p> <p>The developer name of the expression set object alias.</p>
FullName	<p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Create, Group, Nillable</p> <p><b>Description</b></p> <p>The name of the expression set object alias.</p>
Language	<p><b>Type</b></p> <p>picklist</p> <p><b>Properties</b></p> <p>Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b></p> <p>The language in which the expression set object alias is created.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• da—Danish</li> <li>• de—German</li> <li>• en_US—English</li> <li>• es—Spanish</li> <li>• es_MX—Spanish (Mexico)</li> <li>• fi—Finnish</li> <li>• fr—French</li> <li>• it—Italian</li> <li>• ja—Japanese</li> <li>• ko—Korean</li> <li>• nl_NL—Dutch</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>• no—Norwegian</li> <li>• pt_BR—Portuguese (Brazil)</li> <li>• ru—Russian</li> <li>• sv—Swedish</li> <li>• th—Thai</li> <li>• zh_CN—Chinese (Simplified)</li> <li>• zh_TW—Chinese (Traditional)</li> </ul>
ManageableState	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Indicates the manageable state of the specified component that is contained in a package. Possible values are:</p> <ul style="list-style-type: none"> <li>• beta—Managed-Beta</li> <li>• deleted—Managed-Proposed-Deleted</li> <li>• deprecated—Managed-Proposed-Deprecated</li> <li>• deprecatedEditable—SecondGen-Installed-Deprecated</li> <li>• installed—Managed-Installed</li> <li>• installedEditable—SecondGen-Installed-Editable</li> <li>• released—Managed-Released</li> <li>• unmanaged—Unmanaged</li> </ul>
MasterLabel	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> The label of the expression set object alias.</p>
Metadata	<p><b>Type</b> complexvalue</p> <p><b>Properties</b> Create, Nillable, Update</p> <p><b>Description</b> Expression set object alias metadata.</p>
NamespacePrefix	<p><b>Type</b> string</p>

Field	Details
	<p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The namespace prefix associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix.</p>
ObjectAlias	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The alias that corresponds to the source object that's used in an expression set. In the context of an expression set, this alias is 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.</p>
ObjectApiName	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The API name of the source object associated with the alias that's being used in an expression set.</p>
UsageType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> The type of application associated with the industry that's using an expression set. Possible values are:</p> <ul style="list-style-type: none"> <li>• Bre-Default</li> </ul> <p>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.</p>

## 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.

### [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](#).

### 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.

### [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.

### EDITIONS

Available in: Lightning Experience

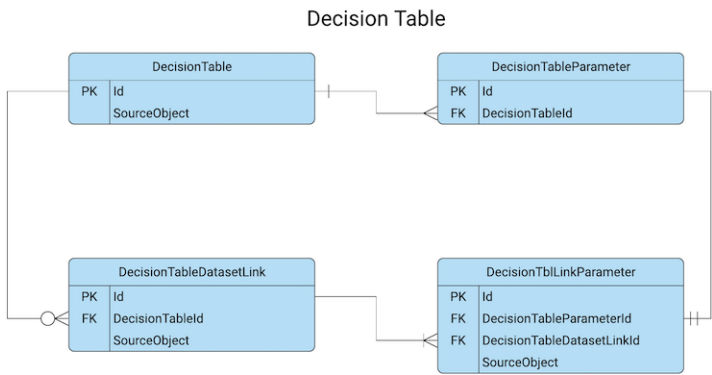
Available in: Decision Table is available with Enterprise, Unlimited, and Performance Editions with Loyalty Management or Rebate Management

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

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	<p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b></p> <p>For internal use only.</p>

Field	Details
ConditionCriteria	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> Custom logic that's used to decide how the input fields are processed.</p>
ConditionType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Condition logic that's used for input fields. Possible values are:</p> <ul style="list-style-type: none"> <li>• All—All conditions are met (AND)</li> <li>• Any—Any condition is met (OR)</li> <li>• Custom—Custom Logic</li> </ul> <p>The default value is 'All'.</p>
DataSourceType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Type of data source that's used to create a decision table. Available in API version 59.0 and later. Valid values are:</p> <ul style="list-style-type: none"> <li>• MultipleSubjects—Multiple sObjects</li> <li>• SingleSubject—Single sObject</li> </ul> <p>The default value is SingleSubject.</p>
DecisionTableParameters	<p><b>Type</b> <a href="#">QueryResult</a></p> <p><b>Properties</b> Nillable</p> <p><b>Description</b> Input or output field in a decision table.</p>
DecisionTableSourceCriteria	<p><b>Type</b> <a href="#">QueryResult</a></p>

Field	Details
	<p><b>Properties</b> Nillable</p> <p><b>Description</b> Filter criteria that's associated with the decision table condition. Available in API version 59.0 and later.</p>
Description	<p><b>Type</b> textarea</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> Description of the decision table.</p>
DeveloperName	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> Developer name of the decision table.</p>
DoesConsiderNullValue	<p><b>Type</b> boolean</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Nillable, Sort</p> <p><b>Description</b> Indicates whether a column that has a null value is considered for lookup (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>. Available in API version 60.0 and later.</p>
FilterResultBy	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> If a collection of inputs returns multiple matching outputs, then the <code>FilterResultBy</code> field specifies how the results of a decision table are filtered.  Available in API version 59.0 and later.  Valid values are:</p> <ul style="list-style-type: none"> <li>• <code>AnyValue</code>—Any Value</li> <li>• <code>FirstMatch</code>—First Match</li> <li>• <code>OutputOrder</code>—Output Order</li> </ul>

Field	Details
FullName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Group, Nillable</p> <p><b>Description</b> Name of the decision table.</p> <p>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.</p>
Language	<p><b>Type</b> picklist</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Language in which the decision table is created.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• da—Danish</li> <li>• de—German</li> <li>• en_US—English</li> <li>• es—Spanish</li> <li>• es_MX—Spanish (Mexico)</li> <li>• fi—Finnish</li> <li>• fr—French</li> <li>• it—Italian</li> <li>• ja—Japanese</li> <li>• ko—Korean</li> <li>• nl_NL—Dutch</li> <li>• no—Norwegian</li> <li>• pt_BR—Portuguese (Brazil)</li> <li>• ru—Russian</li> <li>• sv—Swedish</li> <li>• th—Thai</li> <li>• zh_CN—Chinese (Simplified)</li> <li>• zh_TW—Chinese (Traditional)</li> </ul>
LastSyncDate	<p><b>Type</b> dateTime</p>

Field	Details
	<p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> Latest date on which the decision table was refreshed.</p>
ManageableState	<p><b>Type</b> ManageableState enumerated list</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Indicates the manageable state of the specified component that is contained in a package:</p> <ul style="list-style-type: none"> <li>• beta</li> <li>• deleted</li> <li>• deprecated</li> <li>• deprecatedEditable</li> <li>• installed</li> <li>• installedEditable</li> <li>• released</li> <li>• unmanaged</li> </ul>
MasterLabel	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> Label of the decision table.</p>
Metadata	<p><b>Type</b> complexvalue</p> <p><b>Properties</b> Create, Nillable, Update</p> <p><b>Description</b> Metadata of the decision table.</p> <p>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.</p>
NamespacePrefix	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p>

Field	Details
	<p><b>Description</b></p> <p>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 <b><code>namespacePrefix__componentName</code></b> notation.</p> <p>The namespace prefix can have one of the following values.</p> <ul style="list-style-type: none"> <li>In Developer Edition orgs, <code>NamespacePrefix</code> 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.</li> <li>In orgs that aren't Developer Edition orgs, <code>NamespacePrefix</code> is set only for objects that are part of an installed managed package. All other objects have no namespace prefix.</li> </ul>
PricingElementDecisionTables	<p><b>Type</b> <a href="#">QueryResult</a></p> <p><b>Properties</b> Nillable</p> <p><b>Description</b> Reserved for future use.</p>
RefreshFailureReason	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> Reason for the refresh of the decision table data to fail. Available in API version 60.0 and later.</p>
RefreshStatus	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Refresh status of the cached data in the decision table. Available in API version 60.0 and later.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> <li>Initiated</li> <li>Failed</li> <li>Completed</li> <li>In Progress</li> </ul>

Field	Details
SetupName	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> Required. Name of the decision table, which appears in Setup.</p>
SourceConditionLogic	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> Condition logic that's used to define the decision table from the source data.  Available in API version 59.0 and later.</p>
SourceObject	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> Required. Object that contains the rules based on which the decision table must provide outcomes.</p>
Status	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Restricted picklist, Sort</p> <p><b>Description</b> Required. Status of the decision table.  Valid values are:</p> <ul style="list-style-type: none"> <li>• ActivationInProgress</li> <li>• Active</li> <li>• Draft</li> <li>• Inactive</li> </ul>
Type	<p><b>Type</b> picklist</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Determine whether a decision table's data volume is high or low.</p>

Field	Details
	<p>Available in API version 59.0 and later.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> <li>• <code>HighVolume</code>—Reserved for future use</li> <li>• <code>LowVolume</code></li> <li>• <code>HighScaleExecution</code></li> </ul> <p>The default value is <code>LowVolume</code>.</p>
<code>UsageType</code>	<p><b>Type</b> picklist</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Usage type of the decision table. Available in API version 59.0 and later. Valid value is <code>Bre</code>. The default value is <code>Bre</code>. When Business Rules Engine is enabled for a Salesforce org, the default value is <code>Bre</code>. Other usage types may be available to you depending on your industry solution and permission sets.</p>

## 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()`, `describeObjects()`, `query()`, `retrieve()`, `update()`, `upsert()`

## Supported REST API Methods

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

## Fields

Field	Details
<code>DecisionTableId</code>	<p><b>Type</b> reference</p>

Field	Details
	<p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> Required. The unique identifier of the associated decision table.  This is a relationship field.</p> <p><b>Relationship Name</b> DecisionTable</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> DecisionTable</p>
Description	<p><b>Type</b> textarea</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The description of the dataset link.</p>
DeveloperName	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> The developer name of the dataset link.</p>
FullName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Group, Nillable</p> <p><b>Description</b> 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.</p>
IsDefault	<p><b>Type</b> boolean</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p>

Field	Details
	<b>Description</b> Indicates whether a dataset link is the default dataset link for a decision table.
Language	<b>Type</b> picklist <b>Properties</b> Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort <b>Description</b> The language in which the dataset link is created. Possible values are: <ul style="list-style-type: none"> <li>• da—Danish</li> <li>• de—German</li> <li>• en_US—English</li> <li>• es—Spanish</li> <li>• es_MX—Spanish (Mexico)</li> <li>• fi—Finnish</li> <li>• fr—French</li> <li>• it—Italian</li> <li>• ja—Japanese</li> <li>• ko—Korean</li> <li>• nl_NL—Dutch</li> <li>• no—Norwegian</li> <li>• pt_BR—Portuguese (Brazil)</li> <li>• ru—Russian</li> <li>• sv—Swedish</li> <li>• th—Thai</li> <li>• zh_CN—Chinese (Simplified)</li> <li>• zh_TW—Chinese (Traditional)</li> </ul>
ManageableState	<b>Type</b> ManageableState enumerated list <b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort <b>Description</b> Indicates the manageable state of the specified component that is contained in a package: <ul style="list-style-type: none"> <li>• beta</li> <li>• deleted</li> <li>• deprecated</li> <li>• deprecatedEditable</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>installed</li> <li>installedEditable</li> <li>released</li> <li>unmanaged</li> </ul>
MasterLabel	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> The label of the dataset link.</p>
Metadata	<p><b>Type</b> complexvalue</p> <p><b>Properties</b> Create, Nillable, Update</p> <p><b>Description</b> Decision table dataset link metadata.</p> <p>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.</p>
NamespacePrefix	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> 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 <b><i>namespacePrefix__componentName</i></b> notation.</p> <p>The namespace prefix can have one of the following values.</p> <ul style="list-style-type: none"> <li>In Developer Edition orgs, <b>NamespacePrefix</b> 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.</li> <li>In orgs that are not Developer Edition orgs, <b>NamespacePrefix</b> is set only for objects that are part of an installed managed package. All other objects have no namespace prefix.</li> </ul>

Field	Details
SetupName	<b>Type</b> string <b>Properties</b> Filter, Group, Sort <b>Description</b> Required. The name of the dataset link, which appears in Setup.
SourceObject	<b>Type</b> string <b>Properties</b> Filter, Group, Nillable, Sort <b>Description</b> 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	<b>Type</b> reference <b>Properties</b> Create, Filter, Group, Sort <b>Description</b> The unique identifier of the associated decision table. This is a relationship field. <b>Relationship Name</b> DecisionTable <b>Relationship Type</b> Lookup

Field	Details
	<b>Refers To</b> DecisionTable
DomainObject	<b>Type</b> string <b>Properties</b> Create, Filter, Group, Sort <b>Description</b> For polymorphic fields, indicates the domain object in the field hierarchy. This field is available in API version 59.0 and later.
FieldName	<b>Type</b> string <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> The API name of the field that's selected as an input or output for the decision table.
FieldPath	<b>Type</b> string <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> 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	<b>Type</b> boolean <b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update <b>Description</b> Indicates whether an input field is used to group the business rules of the decision table ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> . This field is available in API version 55.0 and later.
IsRequired	<b>Type</b> boolean <b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	<p><b>Description</b></p> <p>Indicates whether a field is required to have input values when a look up is performed on the decision table (<code>true</code>) or not (<code>false</code>).</p> <p>The default value is <code>false</code>.</p> <p>This field is available in API version 59.0 and later.</p>
ManageableState	<p><b>Type</b></p> <p>picklist</p> <p><b>Properties</b></p> <p>Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b></p> <p>Indicates the manageable state of the specified component that is contained in a package.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>beta</code>—Managed-Beta</li> <li>• <code>deleted</code>—Managed-Proposed-Deleted</li> <li>• <code>deprecated</code>—Managed-Proposed-Deprecated</li> <li>• <code>deprecatedEditable</code>—SecondGen-Installed-Deprecated</li> <li>• <code>installed</code>—Managed-Installed</li> <li>• <code>installedEditable</code>—SecondGen-Installed-Editable</li> <li>• <code>released</code>—Managed-Released</li> <li>• <code>unmanaged</code>—Unmanaged</li> </ul>
Operator	<p><b>Type</b></p> <p>picklist</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b></p> <p>The operator used for the input field.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>DoesNotExistsIn</code></li> <li>• <code>Contains</code></li> <li>• <code>Equals</code></li> <li>• <code>ExistsIn</code></li> <li>• <code>GreaterOrEqual</code></li> <li>• <code>GreaterThan</code></li> <li>• <code>LessOrEqual</code></li> <li>• <code>LessThan</code></li> <li>• <code>Matches</code></li> <li>• <code>DoesNotMatch</code></li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>NotEquals</li> </ul>
Sequence	<p><b>Type</b> int</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The sequence in which input fields are processed.</p>
SortType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> 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:</p> <ul style="list-style-type: none"> <li>AscNullFirst</li> <li>AscNullLast</li> <li>DescNullFirst</li> <li>DescNullLast</li> <li>None</li> </ul> <p>The default value is None. Outputs can't be sorted based on picklist and multi-select picklist fields.</p>
Usage	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> Required. The usage type of a field. Possible values are:</p> <ul style="list-style-type: none"> <li>INPUT</li> <li>OUTPUT</li> </ul>

## 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	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> Required. The name of the field whose value must be compared against an input type decision table parameter when providing the outcome.</p>
DatasetSourceObject	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The object whose field values are evaluated by the associated decision table to provide outcomes.</p>
DecisionTableDatasetLinkId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> The unique identifier of the associated decision table dataset link.  This is a relationship field.</p> <p><b>Relationship Name</b> DecisionTableDatasetLink</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> DecisionTableDatasetLink</p>
DecisionTableParameterId	<p><b>Type</b> reference</p>

Field	Details
	<b>Properties</b> Create, Filter, Group, Sort, Update <b>Description</b> Required. The unique identifier of the associated decision table parameter. This is a relationship field. <b>Relationship Name</b> DecisionTableParameter <b>Relationship Type</b> Lookup <b>Refers To</b> DecisionTableParameter
ManageableState	<b>Type</b> ManageableState enumerated list <b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort <b>Description</b> Indicates the manageable state of the specified component that is contained in a package: <ul style="list-style-type: none"> <li>• beta</li> <li>• deleted</li> <li>• deprecated</li> <li>• deprecatedEditable</li> <li>• installed</li> <li>• installedEditable</li> <li>• released</li> <li>• unmanaged</li> </ul>

## 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< <a href="#">ConnectApi.DecisionTableCondition</a> >	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	<p>The operator used for the input field.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> <li>• <code>DoesNotExistIn</code>—Use to check if the input value doesn't exist in a multi-select picklist.</li> <li>• <code>Equals</code>—Use to check if the input value equals to the configured value in the rule.</li> <li>• <code>ExistsIn</code>—Use to check if the input value exists in a multi-select picklist.</li> <li>• <code>GreaterOrEqual</code>—Use to check if the input value is greater than or equal to the configured value in the rule.</li> <li>• <code>GreaterThan</code>—Use to check if the input value is greater than the configured value in the rule.</li> </ul>	Optional	51.0

Property	Type	Description	Required or Optional	Available Version
		<ul style="list-style-type: none"> <li><code>LessOrEqual</code>—Use to check if the input value is less than or equal to the configured value in the rule.</li> <li><code>LessThan</code>—Use to check if the input value is less than the configured value in the rule.</li> <li><code>Matches</code>—Use to check if the input value is a substring of the value in the rule.</li> <li><code>NotEquals</code>—Use to check if the input value doesn't equal to the configured value in the rule.</li> </ul> <p> <b>Note:</b> The operator specified here overrides the operator defined in Decision Table.</p>		
<code>sourceObject</code>	String	<p>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.</p> <p> <b>Note:</b> The source object field is required only when the dataset link definition contains multiple source objects.</p>	Optional	52.0
<code>value</code>	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
<code>errorCode</code>	Integer	The error code if transaction fails for any reason.	51.0

Property Name	Type	Description	Available Version
errorMessage	String	The error message if transaction fails for any reason.	51.0
outcomeList	List< <a href="#">ConnectApi.DecisionTableOutcomeItem</a> >	<p>The outcome list that stores two or more outcomes provided by the decision table.</p> <p> <b>Note:</b> A decision table that is invoked by the Decision Table custom invocable action can provide up to 50 outcomes.</p>	51.0
outcomeType	String	<p>The outcome type after the request is successful. Valid values are:</p> <ul style="list-style-type: none"> <li>• <code>MultipleMatch</code>—Outcome returns multiple matches.</li> <li>• <code>NoMatch</code>—Outcome returns no match.</li> <li>• <code>SingleMatch</code>—Outcome returns single match.</li> </ul>	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>	<p>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.</p>	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/01Dxx0000000001FAA/data?filter=AssetLevel:101
```

Example for POST

```
https://yourInstance.salesforce.com/services/data/v63.0/connect/business-rules/decision-table/01Dxx0000000001FAA/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
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	Optional	62.0

Parameter Name	Type	Description	Required or Optional	Available Version
		the page starts. The maximum offset is 100 and the default is 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	<a href="#">Decision Table Row Input[]</a>	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	<a href="#">Decision Table Condition[]</a>	The list of decision table conditions on which the decision table executes and provides outcomes.	Required	55.0

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	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	<a href="#">Decision Table Condition[]</a>	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.	Required	55.0

Name	Type	Description	Required or Optional	Available Version
		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.		
operator	String	<p>The operator used for the input field.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> <li>• DoesNotExistIn—Use to check if the input value doesn't exist in a multi-select picklist.</li> <li>• Equals—Use to check if the input value equals to the configured value in the rule.</li> <li>• ExistsIn—Use to check if the input value exists in a multi-select picklist.</li> <li>• GreaterOrEqual—Use to check if the input value is greater than or equal to the configured value in the rule.</li> <li>• GreaterThan—Use to check if the input value is greater than the configured value in the rule.</li> <li>• LessOrEqual—Use to check if the input value is less than or equal to the configured value in the rule.</li> <li>• LessThan—Use to check if the input value is less than the configured value in the rule.</li> <li>• Matches—Use to check if the input value is a substring of the value in the rule.</li> <li>• NotEquals—Use to check if the input value doesn't equal to the configured value in the rule.</li> </ul> <p> <b>Note:</b> The operator specified here overrides the operator defined in Decision Table.</p>	Optional	55.0

Name	Type	Description	Required or Optional	Available Version
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  <b>Note:</b> 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: <ul style="list-style-type: none"> <li>• Create</li> <li>• Update</li> </ul>	Optional	62.0
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	<a href="#">Decision Table Row Input[]</a>	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	<a href="#">Decision Table Outcome Item[]</a>	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	<a href="#">Decision Table Row</a> []	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.

## DecisionTable

Represents the information about a decision table.

### EDITIONS

Available in: Lightning Experience

Available in: Decision Table is available with Enterprise, Unlimited, and Performance Editions with Loyalty Management or Rebate Management

 **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
<code>collectOperator</code>	DecisionTable CollectOperator (enumeration of type string)	Specifies the operator that's used when the result is filtered by the Collect operator.  Valid values are: <ul style="list-style-type: none"> <li>Count</li> <li>Maximum</li> <li>Minimum</li> <li>None</li> <li>Sum</li> </ul>
<code>conditionCriteria</code>	string	Logic that's used to decide how the input fields are processed.
<code>conditionType</code>	DecisionTable ConditionType (enumeration of type string)	Condition logic that's used for input fields.  Valid values are: <ul style="list-style-type: none"> <li>All</li> <li>Any</li> <li>Custom</li> </ul>
<code>dataSourceType</code>	DecisionTable DataSourceType (enumeration of type string)	Required. Specifies the type of data source that's used to create a decision table.  Valid values are: <ul style="list-style-type: none"> <li>CsvUpload</li> <li>MultipleSubjects</li> <li>SingleSubject</li> </ul>

Field Name	Field Type	Description
decisionTableParameters	<a href="#">DecisionTableParameter[]</a>	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 ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> .
executionType	DecisionTable executionType (enumeration of type string)	Indicates the backing storage for the Decision Table.  Valid values are: <ul style="list-style-type: none"> <li>• Hbase</li> <li>• Sql</li> </ul>
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: <ul style="list-style-type: none"> <li>• AnyValue</li> <li>• FirstMatch</li> <li>• OutputOrder</li> </ul>
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: <ul style="list-style-type: none"> <li>• Completed</li> <li>• Failed</li> <li>• InProgress</li> <li>• Initiated</li> </ul>
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: <ul style="list-style-type: none"> <li>• Draft</li> <li>• Inactive</li> <li>• Active</li> <li>• ActivationInProgress</li> </ul>

Field Name	Field Type	Description
type	DecisionTableType Operator (enumeration of type string)	Required. Stores the type of decision table.  Valid values are: <ul style="list-style-type: none"> <li>Advanced</li> <li>High Volume</li> <li>Low Volume</li> <li>Medium Volume</li> <li>High-Scale Execution</li> </ul>
usageType	ExpsSetProcessType (enumeration of type string)	Type of industry or the application within the industry that's using a decision table.  Valid values are: <ul style="list-style-type: none"> <li>Bre</li> </ul> <div>  <b>Note:</b> 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. </div> <ul style="list-style-type: none"> <li>GpaCalculation</li> <li>PlanCostCalculation</li> <li>RatingDiscovery</li> <li>StudentSuccess</li> </ul>

## 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: <ul style="list-style-type: none"> <li>Boolean</li> <li>Currency</li> <li>Date</li> <li>Number</li> <li>Percent</li> <li>String</li> </ul>
fieldName	string	Required. API name of the fields that selected as an input or output for the decision table.

Field Name	Field Type	Description
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: <ul style="list-style-type: none"> <li>Contains</li> <li>DoesNotExistIn</li> <li>DoesNotMatch</li> <li>Equals</li> <li>ExistsIn</li> <li>GreaterOrEqual</li> <li>GreaterThan</li> <li>LessOrEqual</li> <li>LessThan</li> <li>Matches</li> <li>NotEquals</li> </ul>
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: <ul style="list-style-type: none"> <li>AscNullFirst</li> <li>AscNullLast</li> <li>DescNullFirst</li> <li>DescNullLast</li> <li>None</li> </ul> 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: <ul style="list-style-type: none"> <li>INPUT</li> <li>OUTPUT</li> </ul>

## 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>SingleSubject</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>
<decisionTableSourceCriteria>
  <sourceFieldName>IsDeleted</sourceFieldName>
  <operator>Equals</operator>
  <value>false</value>
  <sequenceNumber>1</sequenceNumber>
  <valueType>Literal</valueType>
</decisionTableSourceCriteria>
<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	<a href="#">DecisionTblDatasetParameters</a>	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>
</DecisionTableDatasetLink>
```

```

</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	<p><b>Type</b></p> <p>sObject</p> <p><b>Description</b></p> <p>The name of the dataset link’s object whose records, the decision table must provide an outcome for.</p>

Outputs

Output	Details
outcomeList	<p><b>Type</b></p> <p>sObject</p> <p><b>Description</b></p> <p>Outcome list that stores two or more outcomes provided by the decision table.</p> <p> <b>Note:</b> A decision table that is invoked by the Decision Table custom invocable action can provide up to 50 outcomes.</p>

Output	Details
outcomeType	<p><b>Type</b> string</p> <p><b>Description</b> Indicates the type of outcome provided by the decision table after the request is successful. Valid values are:</p> <ul style="list-style-type: none"> <li>• Multiple Match—Outcome returns multiple matches.</li> <li>• No Match—Outcome returns no match.</li> <li>• Single Match—Outcome returns single match.</li> </ul>
singleOutcome	<p><b>Type</b> sObject</p> <p><b>Description</b> 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.</p>

## 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

Input	Details
	<b>Description</b> Required. API name of an active decision table that you want to refresh.
<code>isIncremental</code>	<b>Type</b> boolean <b>Description</b> Specifies whether to trigger an incremental refresh ( <code>true</code> ) or not ( <code>false</code> ). If set to <code>true</code> , this field triggers an update only on changes made to the recent <code>sObject</code> data instead of performing a full refresh.  The default value is <code>false</code> .  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 <code>sObject</code> data.

## Outputs

Output	Details
<code>errorMessage</code>	<b>Type</b> string <b>Description</b> Error message to indicate why the request wasn't successful.
<code>status</code>	<b>Type</b> string <b>Description</b> Indicates whether the decision table is queued for refresh. Valid values are <code>Queued</code> or <code>Failed</code> .

## 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 Explorer for Expression Set

Decision Explorer 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 Explorer Standard Objects](#)

Use standard objects to create, update, and activate Decision Explorer components.

[Decision Explorer Business APIs](#)

Connect REST APIs help customers, partners, and ISVs integrate with Salesforce software and UIs.

[Decision Explorer Metadata API Types](#)

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

[Decision Explorer 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 Explorer for Expression Sets](#)

## Decision Explorer Standard Objects

Use standard objects to create, update, and activate Decision Explorer 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.

### 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

### 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	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Restricted picklist, Sort</p> <p><b>Description</b> The language of the translated explainability message template. Possible values are:</p> <ul style="list-style-type: none"> <li>• af—Afrikaans</li> <li>• am—Amharic</li> <li>• ar—Arabic</li> <li>• ar_AE—Arabic (United Arab Emirates)</li> <li>• ar_BH—Arabic (Bahrain)</li> <li>• ar_DZ—Arabic (Algeria)</li> <li>• ar_EG—Arabic (Egypt)</li> <li>• ar_IQ—Arabic (Iraq)</li> <li>• ar_JO—Arabic (Jordan)</li> <li>• ar_KW—Arabic (Kuwait)</li> <li>• ar_LB—Arabic (Lebanon)</li> <li>• ar_LY—Arabic (Libya)</li> <li>• ar_MA—Arabic (Morocco)</li> <li>• ar_OM—Arabic (Oman)</li> <li>• ar_QA—Arabic (Qatar)</li> <li>• ar_SA—Arabic (Saudi Arabia)</li> <li>• ar_SD—Arabic (Sudan)</li> <li>• ar_SY—Arabic (Syria)</li> <li>• ar_TN—Arabic (Tunisia)</li> <li>• ar_YE—Arabic (Yemen)</li> <li>• bg—Bulgarian</li> <li>• bn—Bengali</li> <li>• bs—Bosnian</li> <li>• ca—Catalan</li> <li>• cs—Czech</li> <li>• cy—Welsh</li> <li>• da—Danish</li> <li>• de—German</li> <li>• de_AT—German (Austria)</li> <li>• de_BE—German (Belgium)</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>• de_CH—German (Switzerland)</li> <li>• de_LU—German (Luxembourg)</li> <li>• el—Greek</li> <li>• el_CY—Greek (Cyprus)</li> <li>• en_AE—English (United Arab Emirates)</li> <li>• en_AU—English (Australian)</li> <li>• en_BE—English (Belgium)</li> <li>• en_CA—English (Canadian)</li> <li>• en_CY—English (Cyprus)</li> <li>• en_DE—English (Germany)</li> <li>• en_GB—English (UK)</li> <li>• en_HK—English (Hong Kong)</li> <li>• en_IE—English (Ireland)</li> <li>• en_IL—English (Israel)</li> <li>• en_IN—English (Indian)</li> <li>• en_MT—English (Malta)</li> <li>• en_MY—English (Malaysian)</li> <li>• en_NL—English (Netherlands)</li> <li>• en_NZ—English (New Zealand)</li> <li>• en_PH—English (Phillipines)</li> <li>• en_SG—English (Singapore)</li> <li>• en_US—English</li> <li>• en_ZA—English (South Africa)</li> <li>• eo—Esperanto (Pseudo)</li> <li>• es—Spanish</li> <li>• es_AR—Spanish (Argentina)</li> <li>• es_BO—Spanish (Bolivia)</li> <li>• es_CL—Spanish (Chile)</li> <li>• es_CO—Spanish (Colombia)</li> <li>• es_CR—Spanish (Costa Rica)</li> <li>• es_DO—Spanish (Dominican Republic)</li> <li>• es_EC—Spanish (Ecuador)</li> <li>• es_GT—Spanish (Guatemala)</li> <li>• es_HN—Spanish (Honduras)</li> <li>• es_MX—Spanish (Mexico)</li> <li>• es_NI—Spanish (Nicaragua)</li> <li>• es_PA—Spanish (Panama)</li> <li>• es_PE—Spanish (Peru)</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>• es_PR—Spanish (Puerto Rico)</li> <li>• es_PY—Spanish (Paraguay)</li> <li>• es_SV—Spanish (El Salvador)</li> <li>• es_US—Spanish (United States)</li> <li>• es_UY—Spanish (Uruguay)</li> <li>• es_VE—Spanish (Venezuela)</li> <li>• et—Estonian</li> <li>• eu—Basque</li> <li>• fa—Farsi</li> <li>• fi—Finnish</li> <li>• fr—French</li> <li>• fr_BE—French (Belgium)</li> <li>• fr_CA—French (Canadian)</li> <li>• fr_CH—French (Switzerland)</li> <li>• fr_LU—French (Luxembourg)</li> <li>• fr_MA—French (Morocco)</li> <li>• ga—Irish</li> <li>• gu—Gujarati</li> <li>• haw—Hawaiian</li> <li>• hi—Hindi</li> <li>• hm—Hmong</li> <li>• hr—Croatian</li> <li>• ht—Haitian Creole</li> <li>• hu—Hungarian</li> <li>• hy—Armenian</li> <li>• in—Indonesian</li> <li>• is—Icelandic</li> <li>• it—Italian</li> <li>• it_CH—Italian (Switzerland)</li> <li>• iw—Hebrew</li> <li>• iw_EO—Esperanto RTL (Pseudo)</li> <li>• ja—Japanese</li> <li>• ji—Yiddish</li> <li>• ka—Georgian</li> <li>• kk—Kazakh</li> <li>• kl—Greenlandic</li> <li>• km—Khmer</li> <li>• kn—Kannada</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>• ko—Korean</li> <li>• lb—Luxembourgish</li> <li>• lt—Lithuanian</li> <li>• lv—Latvian</li> <li>• mi—Te reo</li> <li>• mk—Macedonian</li> <li>• ml—Malayalam</li> <li>• mr—Marathi</li> <li>• ms—Malay</li> <li>• mt—Maltese</li> <li>• my—Burmese</li> <li>• nl_BE—Dutch (Belgium)</li> <li>• nl_NL—Dutch</li> <li>• no—Norwegian</li> <li>• pa—Punjabi</li> <li>• pl—Polish</li> <li>• pt_BR—Portuguese (Brazil)</li> <li>• pt_PT—Portuguese (European)</li> <li>• rm—Romansh</li> <li>• ro—Romanian</li> <li>• ro_MD—Romanian (Moldova)</li> <li>• ru—Russian</li> <li>• ru_ARM—Russian (Armenia)</li> <li>• ru_BY—Russian (Belarus)</li> <li>• ru_KG—Russian (Kyrgyzstan)</li> <li>• ru_KZ—Russian (Kazakhstan)</li> <li>• ru_LT—Russian (Lithuania)</li> <li>• ru_MD—Russian (Moldova)</li> <li>• ru_PL—Russian (Poland)</li> <li>• ru_UA—Russian (Ukraine)</li> <li>• sh—Serbian (Latin)</li> <li>• sh_ME—Montenegrin</li> <li>• sk—Slovak</li> <li>• sl—Slovene</li> <li>• sm—Samoan</li> <li>• sq—Albanian</li> <li>• sr—Serbian (Cyrillic)</li> <li>• sv—Swedish</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>• <code>sw</code>—Swahili</li> <li>• <code>ta</code>—Tamil</li> <li>• <code>te</code>—Telugu</li> <li>• <code>th</code>—Thai</li> <li>• <code>tl</code>—Tagalog</li> <li>• <code>tr</code>—Turkish</li> <li>• <code>uk</code>—Ukrainian</li> <li>• <code>ur</code>—Urdu</li> <li>• <code>vi</code>—Vietnamese</li> <li>• <code>xh</code>—Xhosa</li> <li>• <code>zh_CN</code>—Chinese (Simplified)</li> <li>• <code>zh_HK</code>—Chinese (Hong Kong)</li> <li>• <code>zh_MY</code>—Chinese (Malaysia)</li> <li>• <code>zh_SG</code>—Chinese (Singapore)</li> <li>• <code>zh_TW</code>—Chinese (Traditional)</li> <li>• <code>zu</code>—Zulu</li> </ul>
NamespacePrefix	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> 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 <code>namespacePrefix__componentName</code> notation. This is a required field.</p> <p>The namespace prefix can have one of the following values.</p> <ul style="list-style-type: none"> <li>• In Developer Edition orgs, <code>NamespacePrefix</code> 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.</li> <li>• In orgs that are not Developer Edition orgs, <code>NamespacePrefix</code> is set only for objects that are part of an installed managed package. All other objects have no namespace prefix.</li> </ul>
ParentId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> The Id of the related explainability message template.</p>

Field	Details
	This field is a relationship field.
	<b>Relationship Name</b> Parent
	<b>Relationship Type</b> Lookup
	<b>Refers To</b> ExplainabilityMsgTemplate
Value	<b>Type</b> textarea  <b>Properties</b> Create, Filter, Sort, Update  <b>Description</b> The translated label of the explainability message template.

## Decision Explorer Business APIs

Connect REST APIs help customers, partners, and ISVs integrate with Salesforce software and UIs.

The Decision Explorer runtime service for Business Rules Engine is exposed through Connect APIs.



**Note:** Use the Decision Explorer resources when your Salesforce instance has Business Rules Engine and Decision Explorer, and you want to show explanations of the results of an expression set step to external users.

With Decision Explorer 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 Explorer API includes these resources.

### Response Bodies

Decision Explorer API includes these response bodies.

## Resources

Decision Explorer 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 ( <code>true</code> ) or not ( <code>false</code> ).	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: <ul style="list-style-type: none"><li>• Calculation</li><li>• Branch</li><li>• Condition</li><li>• Decision Matrix Lookup</li><li>• Decision Table Lookup</li><li>• Aggregation</li><li>• Sub Expression</li><li>• Business Element</li></ul>	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
actionContext Code	String	The record ID within the context of the associated application's action that's used to retrieve action logs.	Optional	56.0

Parameter Name	Type	Description	Required or Optional	Available Version
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 ExplainabilityActionDef ProcessType field.	Optional	56.0
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	<a href="#">Explainability Log Detail[]</a>	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
actionContext Code	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
application LogDate	String	The date and time at which the explainability log is generated by the application's action.	Small, 56.0	56.0

Property Name	Type	Description	Filter Group and Version	Available Version
application Subtype	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
application Type	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
expression SetStepType	String	The step type in an expression set version that uses the explainability message template.  Possible values: <ul style="list-style-type: none"><li>• Calculation</li><li>• Branch</li><li>• Condition</li></ul>	Small, 56.0	56.0

Property Name	Type	Description	Filter Group and Version	Available Version
		<ul style="list-style-type: none"> <li>Decision Matrix Lookup</li> <li>Decision Table Lookup</li> <li>Aggregation</li> <li>Sub Expression</li> <li>Business Element</li> </ul>		
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 ( <code>true</code> ) or not ( <code>false</code> ).	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	<p>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.</p> <p>Possible Values:</p> <ul style="list-style-type: none"> <li>Passed</li> <li>Failed</li> </ul>	Small, 56.0	56.0

## 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 ( <code>true</code> ) or not ( <code>false</code> ).	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	<a href="#">Message Template Detail</a> []	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
<code>evaluationResult</code>	<p><b>Field Type</b></p> <p>EvaluationResult (enumeration of type string)</p> <p><b>Description</b></p> <p>Required.</p> <p>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.</p> <p>Valid values are:</p> <ul style="list-style-type: none"><li>Failed</li><li>Passed</li><li>NoResult</li></ul>
<code>expressionSetStepType</code>	<p><b>Field Type</b></p> <p>ExpressionSetStepType (enumeration of type string)</p> <p><b>Description</b></p> <p>Required.</p> <p>The step type in an expression set that uses the explainability message template.</p> <p>Valid values are:</p>

Field Name	Description
	<ul style="list-style-type: none"> <li>• Aggregation</li> <li>• Branch</li> <li>• BusinessElement</li> <li>• Calculation</li> <li>• Condition</li> <li>• DecisionTableLookup</li> <li>• ListEnabledGroup</li> <li>• ListFilter</li> <li>• MatrixLookup</li> <li>• ReferenceProcedure</li> </ul>
expsSetProcessType	<p><b>Field Type</b> ExpsSetProcessType (enumeration of type string)</p> <p><b>Description</b> Required. The type of industry that's using the expression set. Valid values are:</p> <ul style="list-style-type: none"> <li>• Bre</li> <li>•  <b>Note:</b> 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.</li> </ul>
isDefault	<p><b>Field Type</b> boolean</p> <p><b>Description</b> Indicates whether the decision explainer template for a specified step type is default (true) or not (false).</p>
masterLabel	<p><b>Field Type</b> string</p> <p><b>Description</b> Required. Master label the for ExplainabilityMsgTemplate.</p>
message	<p><b>Field Type</b> string</p> <p><b>Description</b> Required. The message associated with the template for a specific expression set step type.</p>

## 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 Explorer 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.

### [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.

### EDITIONS

Available in: Lightning Experience

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

### 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()`, `describeObjects()`, `query()`, `retrieve()`, `search()`, `update()`, `upsert()`

## Supported REST API Methods

DELETE, GET, HEAD, PATCH, POST, Query

## Fields

Field	Details
DeveloperName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The unique name for the ExplainabilityMsgTemplate object.</p> <p>The unique name of the object in the API. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization. Label is <b>Record Type Name</b>. This field is automatically generated, but you can supply your own value if you create the record using the API.</p>
EmtUsageType	<p><b>Type</b> Picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> A explainability message template's usage type. This field is available from API version 60.0 and later.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• Bre</li> </ul> <p> <b>Note:</b> 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.</p>


Field	Details
ExpressionSetStepType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> The step type in an expression set that uses the explainability message template. This is a required field. Possible values are:</p> <ul style="list-style-type: none"> <li>• Aggregation</li> <li>• Branch</li> <li>• BusinessElement</li> <li>• Calculation</li> <li>• Condition</li> <li>• DecisionTableLookup</li> <li>• ListFilter—This value is available from API version 59.0 and later.</li> <li>• ListEnabledGroup—This value is available from API version 59.0 and later.</li> <li>• MatrixLookup</li> <li>• ReferenceProcedure</li> </ul> <p>The default value is <code>Calculation</code>.</p>
IsDefault	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> Indicates whether the explainability message template for a specified step type is default (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
Language	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The language in which the message in the explainability message template is created. Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>da</code>—Danish</li> <li>• <code>de</code>—German</li> <li>• <code>en_US</code>—English</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>• <code>es</code>—Spanish</li> <li>• <code>es_MX</code>—Spanish (Mexico)</li> <li>• <code>fi</code>—Finnish</li> <li>• <code>fr</code>—French</li> <li>• <code>it</code>—Italian</li> <li>• <code>ja</code>—Japanese</li> <li>• <code>ko</code>—Korean</li> <li>• <code>nl_NL</code>—Dutch</li> <li>• <code>no</code>—Norwegian</li> <li>• <code>pt_BR</code>—Portuguese (Brazil)</li> <li>• <code>ru</code>—Russian</li> <li>• <code>sv</code>—Swedish</li> <li>• <code>th</code>—Thai</li> <li>• <code>zh_CN</code>—Chinese (Simplified)</li> <li>• <code>zh_TW</code>—Chinese (Traditional)</li> </ul>
<code>ManageableState</code>	<p><b>Type</b> ManageableState enumerated list</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Indicates the manageable state of the specified component that is contained in a package:</p> <ul style="list-style-type: none"> <li>• <code>beta</code></li> <li>• <code>deleted</code></li> <li>• <code>deprecated</code></li> <li>• <code>deprecatedEditable</code></li> <li>• <code>installed</code></li> <li>• <code>installedEditable</code></li> <li>• <code>released</code></li> <li>• <code>unmanaged</code></li> </ul>
<code>MasterLabel</code>	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The label for ExplainabilityMsgTemplate. In the UI, this field id Explainability Message Template.</p>
<code>Message</code>	<p><b>Type</b> textarea</p>

Field	Details
	<p><b>Properties</b> Create, Filter, Sort, Update</p> <p><b>Description</b> The message associated with the template for a specific expression set step type. This is a required field.</p>
NamespacePrefix	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> 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 <b><i>namespacePrefix__componentName</i></b> notation.</p> <p>The namespace prefix can have one of the following values:</p> <ul style="list-style-type: none"> <li>• In Developer Edition organizations, the namespace prefix is set to the namespace prefix of the organization for all objects that support it. There is an exception if an object is in an installed managed package. In that case, the object has the namespace prefix of the installed managed package. This field's value is the namespace prefix of the Developer Edition organization of the package developer.</li> <li>• In organizations that are not Developer Edition organizations, <code>NamespacePrefix</code> is only set for objects that are part of an installed managed package. There is no namespace prefix for all other objects.</li> </ul>
ResultType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> 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.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>Failed</code></li> <li>• <code>NoResult</code>—This value is available from API version 59.0 and later.</li> <li>• <code>Passed</code></li> </ul> <p>The default value is <code>Passed</code>.</p>

## 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()`, `describeObjects()`, `query()`, `retrieve()`, `update()`, `upsert()`

### Supported REST API Methods

DELETE, GET, HEAD, PATCH, POST, Query

### Fields

Field	Details
Description	<p><b>Type</b> textarea</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The description of an expression set message token record.</p>
DeveloperName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The unique name for the ExpressionSetMessageToken object.</p> <p>The unique name of the object in the API. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization. Label is <b>Record Type Name</b>. This field is automatically generated, but you can supply your own value if you create the record using the API.</p>
Language	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p>

Field	Details
	<p><b>Description</b></p> <p>The language in which the expression set message token is created.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• da—Danish</li> <li>• de—German</li> <li>• en_US—English</li> <li>• es—Spanish</li> <li>• es_MX—Spanish (Mexico)</li> <li>• fi—Finnish</li> <li>• fr—French</li> <li>• it—Italian</li> <li>• ja—Japanese</li> <li>• ko—Korean</li> <li>• nl_NL—Dutch</li> <li>• no—Norwegian</li> <li>• pt_BR—Portuguese (Brazil)</li> <li>• ru—Russian</li> <li>• sv—Swedish</li> <li>• th—Thai</li> <li>• zh_CN—Chinese (Simplified)</li> <li>• zh_TW—Chinese (Traditional)</li> </ul>
ManageableState	<p><b>Type</b></p> <p>ManageableState enumerated list</p> <p><b>Properties</b></p> <p>Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b></p> <p>Indicates the manageable state of the specified component that is contained in a package:</p> <ul style="list-style-type: none"> <li>• beta</li> <li>• deleted</li> <li>• deprecated</li> <li>• deprecatedEditable</li> <li>• installed</li> <li>• installedEditable</li> <li>• released</li> <li>• unmanaged</li> </ul>
MasterLabel	<p><b>Type</b></p> <p>string</p>

Field	Details
	<p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The label for the ExpressionSetMessageToken. In the UI, this field is Expression Set Message Token.</p>
NamespacePrefix	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> 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 <b><i>namespacePrefix__componentName</i></b> notation.</p> <p>The namespace prefix can have one of the following values:</p> <ul style="list-style-type: none"> <li>• In Developer Edition organizations, the namespace prefix is set to the namespace prefix of the organization for all objects that support it. There is an exception if an object is in an installed managed package. In that case, the object has the namespace prefix of the installed managed package. This field's value is the namespace prefix of the Developer Edition organization of the package developer.</li> <li>• In organizations that are not Developer Edition organizations, <b>NamespacePrefix</b> is only set for objects that are part of an installed managed package. There is no namespace prefix for all other objects.</li> </ul>

## 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:

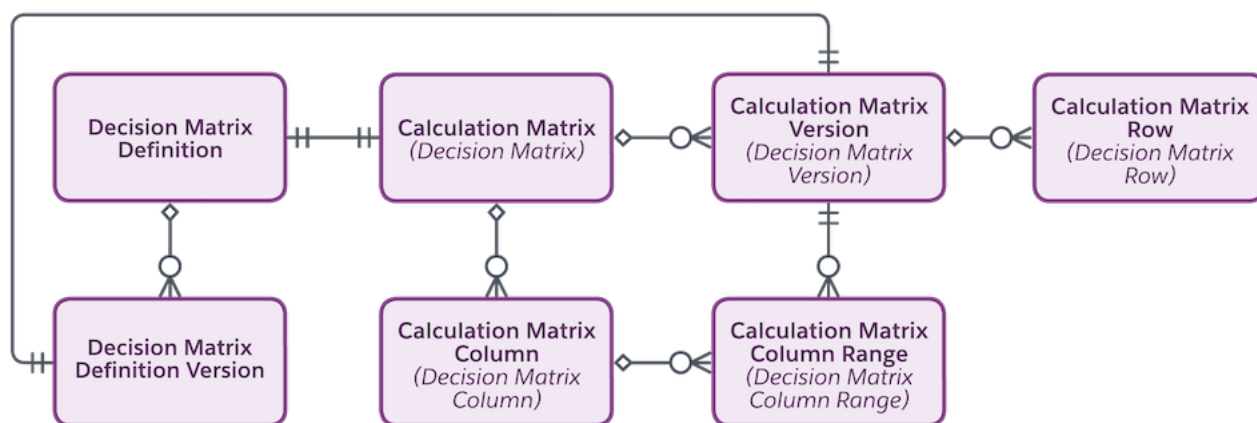
[Salesforce Help: Decision Matrices](#)

[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.

### [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.

#### EDITIONS

Available in: Lightning Experience

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

[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	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort</p> <p><b>Description</b> The decision matrix definition record associated with this calculation matrix. This field is a polymorphic relationship field.</p> <p><b>Relationship Name</b> DecisionMatrixDefinition</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> DecisionMatrixDefinition, DecisionTable</p>
DecisionMatrixType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p>

Field	Details
	<p><b>Description</b></p> <p>Specifies the type of lookup table.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>DecisionMatrix</code></li> <li>• <code>DecisionTable</code></li> </ul> <p>The default value is <code>DecisionMatrix</code>.</p>
Description	<p><b>Type</b></p> <p>textarea</p> <p><b>Properties</b></p> <p>Create, Nillable, Update</p> <p><b>Description</b></p> <p>A text description of the Decision Matrix.</p>
GroupKey	<p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b></p> <p>A key for grouping matrix rows in different versions, such as geographic region or product code.</p>
LastReferencedDate	<p><b>Type</b></p> <p>dateTime</p> <p><b>Properties</b></p> <p>Filter, Nillable, Sort</p> <p><b>Description</b></p> <p>The timestamp when the current user last accessed this record, a record related to this record, or a list view.</p>
LastViewedDate	<p><b>Type</b></p> <p>dateTime</p> <p><b>Properties</b></p> <p>Filter, Nillable, Sort</p> <p><b>Description</b></p> <p>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 (<code>LastReferencedDate</code>) but didn't view it.</p>
MigrationStatus	<p><b>Type</b></p> <p>textarea</p>

Field	Details
	<p><b>Properties</b> Nillable</p> <p><b>Description</b> The status of migrating the data from the Calculation Matrix object to the Decision Matrix Definition object.</p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, idLookup, Sort, Update</p> <p><b>Description</b> The Decision Matrix name.</p>
OwnerId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> 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.</p> <p><b>Relationship Name</b> Owner</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> Group, User</p>
SubGroupKey	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> 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.</p>
Type	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p>

Field	Details
	<p><b>Description</b></p> <p>The Decision Matrix type. A Standard Decision Matrix has no special features. A Grouped Decision Matrix groups rows by one or two keys (<code>GroupKey</code> and <code>SubGroupKey</code>) such as geographic region or product code.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>Grouped</li> <li>Standard</li> </ul>
UniqueName	<p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b></p> <p>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.</p>
UsageType	<p><b>Type</b></p> <p>picklist</p> <p><b>Properties</b></p> <p>Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b></p> <p>A decision matrix's usage type.</p> <p>Available in API version 59.0 and later.</p> <p>Possible value is:</p> <ul style="list-style-type: none"> <li>Bre-Default</li> </ul> <p>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.</p>

## 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	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The API name of the column.</p>
CalculationMatrixId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> The ID of the Decision Matrix to which this column belongs. This is a relationship field.</p> <p><b>Relationship Name</b> CalculationMatrix</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> CalculationMatrix</p>
ColumnType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Specifies whether the column matches matrix input or is returned as output. Possible values are:</p> <ul style="list-style-type: none"> <li>• Input</li> <li>• Output</li> </ul>

Field	Details
DataType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> The type of data in the column. Possible values are:</p> <ul style="list-style-type: none"> <li>• Boolean</li> <li>• Currency</li> <li>• Number</li> <li>• NumberRange</li> <li>• Percent</li> <li>• Text</li> <li>• TextRange</li> </ul>
DisplaySequence	<p><b>Type</b> int</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The position of this column in the column order.</p>
IsWildcardColumn	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> Specifies that this column can contain a wildcard value such as <code>ALL</code>. The default value is <code>false</code>.</p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, idLookup, Sort, Update</p> <p><b>Description</b> The column name.</p>
RangeValues	<p><b>Type</b> textarea</p>

Field	Details
	<b>Properties</b> Create, Nillable, Update  <b>Description</b> A list of values that define range boundaries.
WildcardColumnValue	<b>Type</b> string  <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update  <b>Description</b> 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	<b>Type</b> reference  <b>Properties</b> Create, Filter, Group, Sort  <b>Description</b> The ID of the decision matrix column associated with the column range value.  This field is a relationship field.  <b>Relationship Name</b> CalculationMatrixColumn  <b>Relationship Type</b> Lookup  <b>Refers To</b> CalculationMatrixColumn

Field	Details
CalculationMatrixVersionId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The decision matrix version ID asociated with the column range value. This field is a relationship field.</p> <p><b>Relationship Name</b> CalculationMatrixVersion</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> CalculationMatrixVersion</p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, idLookup, Sort, Update</p> <p><b>Description</b> The name of the decision matrix column.</p>
Occurrence	<p><b>Type</b> int</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The number of times a range value is used in a decision matrix version.</p>
RangeStartValue	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The value that defines the start of a range.</p>

## 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	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The ID of the Decision Matrix Version to which this row belongs.  This is a relationship field.</p> <p><b>Relationship Name</b> CalculationMatrixVersion</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> CalculationMatrixVersion</p>
EndDateTime	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The last date on which this row version is active. Applicable if <code>IsVersionEnabled</code> is <code>true</code>.</p>
InputData	<p><b>Type</b> textarea</p> <p><b>Properties</b> Create, Nillable, Update</p> <p><b>Description</b> The input columns and associated values for this row of the matrix.</p>
IsVersionEnabled	<p><b>Type</b> boolean</p>

Field	Details
	<b>Properties</b> Defaulted on create, Filter, Group, Sort <b>Description</b> Specifies whether the associated matrix version is active. Derived from the associated Decision Matrix Version (CalculationMatrixVersion object). The default value is <code>false</code> .
Name	<b>Type</b> string <b>Properties</b> Create, Filter, Group, idLookup, Sort, Update <b>Description</b> The row name.
OutputData	<b>Type</b> textarea <b>Properties</b> Create, Nillable, Update <b>Description</b> The output columns and associated values for this row of the matrix.
StartDateTime	<b>Type</b> dateTime <b>Properties</b> Create, Filter, Nillable, Sort, Update <b>Description</b> The first date on which this row version is active. Applicable if <code>IsVersionEnabled</code> is <code>true</code> .

## 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	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The API name of the decision matrix version. This field is available in API version 56.0 and later.</p>
CalculationMatrixId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> The ID of the Decision Matrix to which this version belongs.  This is a relationship field.</p> <p><b>Relationship Name</b> CalculationMatrix</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> CalculationMatrix</p>
DecisionMatrixDefinitionVerId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort</p> <p><b>Description</b> The decision matrix definition version associated with this calculation matrix version.  This field is a relationship field.</p> <p><b>Relationship Name</b> DecisionMatrixDefinitionVer</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> DecisionMatrixDefinitionVersion</p>
DscnModelNoteExportStatus	<p><b>Type</b> reference</p>

Field	Details
	<p><b>Properties</b> Create, Filter, Group, Nillable, Sort</p> <p><b>Description</b> Indicates the export status of a decision matrix version in the Decision Model and Notation (DMN) format.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• Initiated</li> <li>• InProgress</li> <li>• Complete</li> <li>• Failed</li> </ul>
EndDateTime	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The last date on which this matrix version is active.</p>
GroupKey	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> A key for grouping matrix rows in different versions, such as geographic region or product code. Derived from the associated Decision Matrix (CalculationMatrix object).</p>
GroupKeyValue	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The value of the GroupKey for this version. For example, if the GroupKey is Country, the GroupKeyValue can be United States.</p>
IsEnabled	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> Specifies whether this version is active.</p> <p>The default value is <code>false</code>.</p>

Field	Details
LoadProcessStatus	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> The status of a data upload from a <code>.csv</code> file. Possible values are:</p> <ul style="list-style-type: none"> <li>Completed</li> <li>CompletedWithErrors</li> <li>Failed</li> <li>InProgress</li> <li>Pending</li> </ul>
MatrixType	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The matrix type, either <code>Standard</code> or <code>Grouped</code>. 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 (<code>CalculationMatrix</code> object).</p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, idLookup, Sort, Update</p> <p><b>Description</b> The matrix version name.</p>
Rank	<p><b>Type</b> int</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> When the invocation time of a matrix call is between the <code>StartDateTime</code> and <code>EndDateTime</code> of more than one enabled matrix version, the version with the highest <code>Rank</code> is chosen.</p>
StartDateTime	<p><b>Type</b> dateTime</p>

Field	Details
	<b>Properties</b> Create, Filter, Nillable, Sort, Update  <b>Description</b> The first date on which this matrix version is active.
SubGroupKey	<b>Type</b> string  <b>Properties</b> Filter, Group, Nillable, Sort  <b>Description</b> 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).
SubGroupKeyValue	<b>Type</b> string  <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update  <b>Description</b> The value of the SubGroupKey for this version. For example, if the SubGroupKey is State or Province, the SubGroupKeyValue can be California.
VersionNumber	<b>Type</b> int  <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update  <b>Description</b> 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	<a href="#">Decision Matrix Input</a>	List of inputs passed to a decision matrix. An input may contain multiple variables.	Required	55.0
options	<a href="#">Decision Matrix Options Input</a>	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",
    "01NRO0000000rfn27AA"
  ]
}
```

**Properties**

Name	Type	Description	Required or Optional	Available Version
decision Model EntityIds	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: <ul style="list-style-type: none"> <li>Count</li> <li>Maximum</li> <li>Minimum</li> <li>None</li> <li>Sum</li> </ul>	Optional	58.0
condition Criteria	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: <ul style="list-style-type: none"> <li>All</li> <li>Any</li> <li>Custom</li> </ul>	Optional	58.0
description	String	Description of the decision table.	Optional	58.0
decision ResultPolicy	String	Results policy to filter results of the decision table. Valid values are: <ul style="list-style-type: none"> <li>AnyValue</li> <li>CollectOperator-For internal use only</li> <li>FirstMatch</li> </ul>	Optional	58.0

Name	Type	Description	Required or Optional	Available Version
		<ul style="list-style-type: none"> <li>• <code>OutputOrder</code></li> <li>• <code>PriorityFor</code> internal use only</li> <li>• <code>RuleOrderFor</code> internal use only</li> <li>• <code>UniqueValuesFor</code> internal use only</li> </ul>		
<code>doesConsiderNullValue</code>	Boolean	Indicates whether a column that has a null value is considered for lookup ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> .	Optional	60.0
<code>fullName</code>	String	Unique name of the rule definition.	Required	58.0
<code>isSetCollectOperator</code>	Boolean	For internal use only. Indicates whether the <code>collectOperator</code> is enabled ( <code>true</code> ) or not ( <code>false</code> ).	Optional	58.0
<code>isSetConditionCriteria</code>	Boolean	For internal use only. Indicates whether the <code>conditionCriteria</code> field is enabled ( <code>true</code> ) or not ( <code>false</code> ).	Optional	58.0
<code>isSetConditionType</code>	Boolean	For internal use only. Indicates whether the <code>conditionType</code> field is enabled ( <code>true</code> ) or not ( <code>false</code> ).	Optional	58.0
<code>isSetDescription</code>	Boolean	For internal use only. Indicates whether the <code>description</code> field is enabled ( <code>true</code> ) or not ( <code>false</code> ).	Optional	58.0
<code>isSetDecisionResultPolicy</code>	Boolean	For internal use only. Indicates whether the <code>DecisionResultPolicy</code> field is enabled ( <code>true</code> ) or not ( <code>false</code> ).	Optional	58.0
<code>isSetFullName</code>	Boolean	For internal use only. Indicates whether the <code>FullName</code> field is enabled ( <code>true</code> ) or not ( <code>false</code> ).	Optional	58.0

Name	Type	Description	Required or Optional	Available Version
isSetParameters	Boolean	For internal use only. Indicates whether the <code>parameters</code> field is enabled ( <code>true</code> ) or not ( <code>false</code> ).	Optional	58.0
isSetSetupName	Boolean	For internal use only. Indicates whether the <code>setupName</code> field is enabled ( <code>true</code> ) or not ( <code>false</code> ).	Optional	58.0
isSetSourceConditionLogic	Boolean	For internal use only. Indicates whether the <code>sourceConditionLogic</code> field is enabled ( <code>true</code> ) or not ( <code>false</code> ).	Optional	58.0
isSetSourceCriteria	Boolean	For internal use only. Indicates whether the <code>sourceCriteria</code> field is enabled ( <code>true</code> ) or not ( <code>false</code> ).	Optional	58.0
isSetSourceObject	Boolean	For internal use only. Indicates whether the <code>sourceObject</code> field is enabled ( <code>true</code> ) or not ( <code>false</code> ).	Optional	58.0
isSetSourceType	Boolean	For internal use only. Indicates whether the <code>sourceType</code> is enabled ( <code>true</code> ) or not ( <code>false</code> ).	Optional	58.0
isSetType	Boolean	For internal use only. Indicates whether the <code>type</code> field is enabled ( <code>true</code> ) or not ( <code>false</code> ).	Optional	58.0
isSetUsageType	Boolean	For internal use only. Indicates whether the <code>UsageType</code> field is enabled ( <code>true</code> ) or not ( <code>false</code> ).	Optional	58.0
parameters	<a href="#">Decision Table Parameter Input[]</a>	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	<a href="#">Decision Table Source Criteria Input[]</a>	Output array representation of source filters for the decision table rows, such	Optional	58.0

Name	Type	Description	Required or Optional	Available Version
		as, fieldName, operators, valueType, and more.		
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: <ul style="list-style-type: none"> <li>CsvUpload</li> <li>MultipleSubjects</li> <li>SingleSubject</li> </ul>	Required	58.0
status	String	Status of the decision table. Valid values are: <ul style="list-style-type: none"> <li>ActivationInProgress</li> <li>ActivationInProgress</li> <li>Draft</li> <li>Inactive</li> </ul>	Required	58.0
type	String	Type of the decision table. Valid values are: <ul style="list-style-type: none"> <li>HighVolume</li> <li>LowVolume</li> </ul>	Optional	58.0
usageType	String	Process type that uses the decision table. Valid values are: <ul style="list-style-type: none"> <li>Pricing</li> <li>ProductEligibility</li> </ul>	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/01Dxx000000002Ur
```

**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/01Dxx000000002Ur
```

**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: <ul style="list-style-type: none"> <li>Count</li> <li>Maximum</li> <li>Minimum</li> <li>None</li> <li>Sum</li> </ul>	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: <ul style="list-style-type: none"> <li>All</li> <li>Any</li> <li>Custom</li> </ul>	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: <ul style="list-style-type: none"> <li>AnyValue</li> <li>CollectOperator-For internal use only</li> </ul>	Optional	58.0

Name	Type	Description	Required or Optional	Available Version
		<ul style="list-style-type: none"> <li>• FirstMatch</li> <li>• OutputOrder</li> <li>• Priority-For internal use only</li> <li>• RuleOrder-For internal use only</li> <li>• UniqueValues-For internal use only</li> </ul>		
doesConsiderNullValue	Boolean	Indicates whether a column that has a null value is considered for lookup ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> .	Optional	60.0
fullName	String	Unique name of the rule definition.	Required	58.0
isSetCollectOperator	Boolean	For internal use only. Indicates whether the <code>collectOperator</code> is enabled ( <code>true</code> ) or not ( <code>false</code> ).	Optional	58.0
isSetConditionCriteria	Boolean	For internal use only. Indicates whether the <code>conditionCriteria</code> field is enabled ( <code>true</code> ) or not ( <code>false</code> ).	Optional	58.0
isSetConditionType	Boolean	For internal use only. Indicates whether the <code>conditionType</code> field is enabled ( <code>true</code> ) or not ( <code>false</code> ).	Optional	58.0
isSetDescription	Boolean	For internal use only. Indicates whether the <code>description</code> field is enabled ( <code>true</code> ) or not ( <code>false</code> ).	Optional	58.0
isSetDecisionResultPolicy	Boolean	For internal use only. Indicates whether the <code>DecisionResultPolicy</code> field is enabled ( <code>true</code> ) or not ( <code>false</code> ).	Optional	58.0
isSetFullName	Boolean	For internal use only. Indicates whether the <code>FullName</code> field is enabled ( <code>true</code> ) or not ( <code>false</code> ).	Optional	58.0

Name	Type	Description	Required or Optional	Available Version
isSetParameters	Boolean	For internal use only. Indicates whether the <code>parameters</code> field is enabled ( <code>true</code> ) or not ( <code>false</code> ).	Optional	58.0
isSetSetupName	Boolean	For internal use only. Indicates whether the <code>setupName</code> field is enabled ( <code>true</code> ) or not ( <code>false</code> ).	Optional	58.0
isSetSourceConditionLogic	Boolean	For internal use only. Indicates whether the <code>sourceConditionLogic</code> field is enabled ( <code>true</code> ) or not ( <code>false</code> ).	Optional	58.0
isSetSourceCriteria	Boolean	For internal use only. Indicates whether the <code>sourceCriteria</code> field is enabled ( <code>true</code> ) or not ( <code>false</code> ).	Optional	58.0
isSetSourceObject	Boolean	For internal use only. Indicates whether the <code>sourceObject</code> field is enabled ( <code>true</code> ) or not ( <code>false</code> ).	Optional	58.0
isSetSourceType	Boolean	For internal use only. Indicates whether the <code>sourceType</code> is enabled ( <code>true</code> ) or not ( <code>false</code> ).	Optional	58.0
isSetType	Boolean	For internal use only. Indicates whether the <code>type</code> field is enabled ( <code>true</code> ) or not ( <code>false</code> ).	Optional	58.0
isSetUsageType	Boolean	For internal use only. Indicates whether the <code>UsageType</code> field is enabled ( <code>true</code> ) or not ( <code>false</code> ).	Optional	58.0
parameters	<a href="#">Decision Table Parameter Input[]</a>	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	<a href="#">Decision Table Source Criteria Input[]</a>	Output array representation of source filters for the decision table rows, such	Optional	58.0

Name	Type	Description	Required or Optional	Available Version
		as, fieldName, operators, valueType, and more.		
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: <ul style="list-style-type: none"> <li>CsvUpload</li> <li>MultipleSubjects</li> <li>SingleSubject</li> </ul>	Required	58.0
status	String	Status of the decision table. Valid values are: <ul style="list-style-type: none"> <li>ActivationInProgress</li> <li>ActivationInProgress</li> <li>Draft</li> <li>Inactive</li> </ul>	Required	58.0
type	String	Type of the decision table. Valid values are: <ul style="list-style-type: none"> <li>HighVolume</li> <li>LowVolume</li> </ul>	Optional	58.0
usageType	String	Process type that uses the decision table. Valid values are: <ul style="list-style-type: none"> <li>Pricing</li> <li>ProductEligibility</li> </ul>	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	<a href="#">Decision Table Condition[]</a>	The list of decision table conditions on which the decision table executes and provides outcomes.	Required	55.0

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	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	<a href="#">Decision Table Condition List</a>	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&datasetLinkName=DatasetLinkName
```

### 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: <ul style="list-style-type: none"> <li>DecisionMatrix</li> <li>DecisionTable</li> </ul>	Optional	59.0
searchKey	String	The search text entered by the user to retrieve a list of lookup tables.	Required	59.0
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	<a href="#">Decision Matrix Variable List</a>	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	<a href="#">Decision Matrix Input</a>	List of inputs passed to a decision matrix. An input may contain multiple variables.	Required	55.0
options	<a href="#">Decision Matrix Options Input</a>	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-ddT'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",
    "01NRO0000000rfn27AA"
  ]
}
```

**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	<a href="#">Decision Table Condition List</a>	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

**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	<p>The value of the data type that is selected as an input.</p> <p>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.</p>	Required	55.0
operator	String	<p>The operator used for the input field.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> <li>• DoesNotExistIn—Use to check if the input value doesn't exist in a multi-select picklist.</li> <li>• Equals—Use to check if the input value equals to the configured value in the rule.</li> <li>• ExistsIn—Use to check if the input value exists in a multi-select picklist.</li> <li>• GreaterOrEqual—Use to check if the input value is greater than or</li> </ul>	Optional	55.0

Name	Type	Description	Required or Optional	Available Version
		<p>equal to the configured value in the rule.</p> <ul style="list-style-type: none"> <li>• <code>GreaterThan</code>—Use to check if the input value is greater than the configured value in the rule.</li> <li>• <code>LessOrEqual</code>—Use to check if the input value is less than or equal to the configured value in the rule.</li> <li>• <code>LessThan</code>—Use to check if the input value is less than the configured value in the rule.</li> <li>• <code>Matches</code>—Use to check if the input value is a substring of the value in the rule.</li> <li>• <code>NotEquals</code>—Use to check if the input value doesn't equal to the configured value in the rule.</li> </ul> <p> <b>Note:</b> The operator specified here overrides the operator defined in Decision Table.</p>		
<code>sourceObject</code>	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  <b>Note:</b> 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	<a href="#">Decision Table Condition[]</a>	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	<a href="#">Decision Table Condition[]</a>	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: <ul style="list-style-type: none"> <li>Count</li> <li>Maximum</li> <li>Minimum</li> <li>None</li> <li>Sum</li> </ul>	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: <ul style="list-style-type: none"> <li>All</li> <li>Any</li> <li>Custom</li> </ul>	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: <ul style="list-style-type: none"> <li>AnyValue</li> <li>CollectOperator-For internal use only</li> </ul>	Optional	58.0

Name	Type	Description	Required or Optional	Available Version
		<ul style="list-style-type: none"> <li>• FirstMatch</li> <li>• OutputOrder</li> <li>• Priority-For internal use only</li> <li>• RuleOrder-For internal use only</li> <li>• UniqueValues-For internal use only</li> </ul>		
doesConsiderNullValue	Boolean	Indicates whether a column that has a null value is considered for lookup ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> .	Optional	60.0
fullName	String	Unique name of the rule definition.	Required	58.0
isSetCollectOperator	Boolean	For internal use only. Indicates whether the <code>collectOperator</code> is enabled ( <code>true</code> ) or not ( <code>false</code> ).	Optional	58.0
isSetConditionCriteria	Boolean	For internal use only. Indicates whether the <code>conditionCriteria</code> field is enabled ( <code>true</code> ) or not ( <code>false</code> ).	Optional	58.0
isSetConditionType	Boolean	For internal use only. Indicates whether the <code>conditionType</code> field is enabled ( <code>true</code> ) or not ( <code>false</code> ).	Optional	58.0
isSetDescription	Boolean	For internal use only. Indicates whether the <code>description</code> field is enabled ( <code>true</code> ) or not ( <code>false</code> ).	Optional	58.0
isSetDecisionResultPolicy	Boolean	For internal use only. Indicates whether the <code>DecisionResultPolicy</code> field is enabled ( <code>true</code> ) or not ( <code>false</code> ).	Optional	58.0
isSetFullName	Boolean	For internal use only. Indicates whether the <code>FullName</code> field is enabled ( <code>true</code> ) or not ( <code>false</code> ).	Optional	58.0

Name	Type	Description	Required or Optional	Available Version
isSetParameters	Boolean	For internal use only. Indicates whether the <code>parameters</code> field is enabled ( <code>true</code> ) or not ( <code>false</code> ).	Optional	58.0
isSetSetupName	Boolean	For internal use only. Indicates whether the <code>setupName</code> field is enabled ( <code>true</code> ) or not ( <code>false</code> ).	Optional	58.0
isSetSourceConditionLogic	Boolean	For internal use only. Indicates whether the <code>sourceConditionLogic</code> field is enabled ( <code>true</code> ) or not ( <code>false</code> ).	Optional	58.0
isSetSourceCriteria	Boolean	For internal use only. Indicates whether the <code>sourceCriteria</code> field is enabled ( <code>true</code> ) or not ( <code>false</code> ).	Optional	58.0
isSetSourceObject	Boolean	For internal use only. Indicates whether the <code>sourceObject</code> field is enabled ( <code>true</code> ) or not ( <code>false</code> ).	Optional	58.0
isSetSourceType	Boolean	For internal use only. Indicates whether the <code>sourceType</code> is enabled ( <code>true</code> ) or not ( <code>false</code> ).	Optional	58.0
isSetType	Boolean	For internal use only. Indicates whether the <code>type</code> field is enabled ( <code>true</code> ) or not ( <code>false</code> ).	Optional	58.0
isSetUsageType	Boolean	For internal use only. Indicates whether the <code>UsageType</code> field is enabled ( <code>true</code> ) or not ( <code>false</code> ).	Optional	58.0
parameters	<a href="#">Decision Table Parameter Input[]</a>	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	<a href="#">Decision Table Source Criteria Input[]</a>	Output array representation of source filters for the decision table rows, such as,	Optional	58.0

Name	Type	Description	Required or Optional	Available Version
		fieldName, operators, valueType, and more.		
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: <ul style="list-style-type: none"> <li>CsvUpload</li> <li>MultipleSubjects</li> <li>SingleSubject</li> </ul>	Required	58.0
status	String	Status of the decision table. Valid values are: <ul style="list-style-type: none"> <li>ActivationInProgress</li> <li>ActivationInProgress</li> <li>Draft</li> <li>Inactive</li> </ul>	Required	58.0
type	String	Type of the decision table. Valid values are: <ul style="list-style-type: none"> <li>HighVolume</li> <li>LowVolume</li> </ul>	Optional	58.0
usageType	String	Process type that uses the decision table. Valid values are: <ul style="list-style-type: none"> <li>Pricing</li> <li>ProductEligibility</li> </ul>	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

Name	Type	Description	Required or Optional	Available Version
dataType	String	Data type of the field used. Possible values are: <ul style="list-style-type: none"> <li>• Boolean</li> <li>• Currency</li> <li>• Date</li> <li>• Number</li> <li>• Percent</li> <li>• String</li> </ul>	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
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 ( <code>true</code> ) or not ( <code>false</code> ).	Optional	58.0
isPriority	Boolean	Indicates whether it's a priority field ( <code>true</code> ) or not ( <code>false</code> ).	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: <ul style="list-style-type: none"> <li>• Between</li> <li>• DoesNotExistIn</li> <li>• Equals</li> <li>• ExistsIn</li> <li>• GreaterOrEqual</li> <li>• GreaterThan</li> <li>• LessOrEqual</li> <li>• LessThan</li> <li>• Matches</li> <li>• NotEquals</li> </ul>	Optional	58.0
sequence	Integer	Sequence in which input fields are processed.	Optional	58.0

Name	Type	Description	Required or Optional	Available Version
sortType	String	Type of sorting to be done on the rows of a decision table. Possible values are: <ul style="list-style-type: none"> <li>AscNullFirst- Sort row values in ascending order, showing null values first.</li> <li>AscNullLast- Sort row values in ascending order, showing null values last.</li> <li>DescNullFirst- Sort row values in descending order, showing null values first.</li> <li>DescNullLast- Sort row values in descending order, showing null values last.</li> <li>None - Show rows as they are without sorting.</li> </ul>	Optional	58.0
usage	String	Usage type for a field. Possible values are: <ul style="list-style-type: none"> <li>Input</li> <li>Output</li> </ul>	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: <ul style="list-style-type: none"> <li>Contains</li> <li>DoesNotContain</li> <li>Equals</li> <li>GreaterThan</li> <li>GreaterThanOrEqual</li> <li>IsNull</li> <li>IsNotNull</li> <li>LessThan</li> <li>LessThanOrEqual</li> </ul>	Required	58.0

Name	Type	Description	Required or Optional	Available Version
		<ul style="list-style-type: none"> <li>NotEqual</li> </ul>		
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: <ul style="list-style-type: none"> <li>Formula</li> <li>Literal</li> <li>Lookup</li> <li>Parameter</li> <li>PickList</li> </ul>	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	<a href="#">Variable Output[]</a>	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	<a href="#">Decision Matrix Lookup Basic Result</a> []	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": "01NRO0000004fsdfAA"
    }
  ]
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
errors	<a href="#">Decision Model Export Error</a> []	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 ( <code>true</code> ) or not ( <code>false</code> ).	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	<a href="#">Decision Table Outcome</a>	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: <ul style="list-style-type: none"> <li>Count</li> <li>Maximum</li> <li>Minimum</li> <li>None</li> <li>Sum</li> </ul>	Small, 58.0	58.0
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: <ul style="list-style-type: none"> <li>All</li> <li>Any</li> <li>Custom</li> </ul>	Small, 58.0	58.0
decisionResultPolicy	String	Results policy to specify the result of the decision table. Valid values are: <ul style="list-style-type: none"> <li>AnyValue</li> <li>CollectOperator-For internal use only</li> <li>FirstMatch</li> <li>OutputOrder</li> <li>Priority-For internal use only</li> <li>RuleOrder-For internal use only</li> <li>UniqueValues-For internal use only</li> </ul>	Small, 58.0	58.0

Property Name	Type	Description	Filter Group and Version	Available Version
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 ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> .	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	<a href="#">Decision Table Parameter Output[]</a>	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	<a href="#">Decision Table Source Criteria Output[]</a>	Output array representation of source filters.	Small, 58.0	58.0
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: <ul style="list-style-type: none"> <li>• <code>CsvUpload</code></li> <li>• <code>MultipleSubjects</code></li> <li>• <code>SingleSubject</code></li> </ul>	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: <ul style="list-style-type: none"> <li>• <code>ActivationInProgress</code></li> <li>• <code>ActivationInProgress</code></li> <li>• <code>Draft</code></li> <li>• <code>Inactive</code></li> </ul>	Small, 58.0	58.0
usageType	String	Process type that uses the decision table. Valid values are: <ul style="list-style-type: none"> <li>• <code>Pricing</code></li> <li>• <code>ProductEligibility</code></li> </ul>	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	<a href="#">Decision Table Outcome Item[]</a>	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

Property Name	Type	Description	Filter Group and Version	Available Version
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": "Eligibility of Products using Qualification Rules",
    "id": "01Dxx00000000BJ",
    "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	<a href="#">Decision Table Definition Output</a>	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 ( <code>true</code> ) or not ( <code>false</code> ).	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: <ul style="list-style-type: none"> <li>• Boolean</li> <li>• Currency</li> <li>• Date</li> <li>• Number</li> <li>• Percent</li> <li>• String</li> </ul>	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
isGroupByField	Boolean	Indicates whether the field is used to group the business rules of the decision table ( <code>true</code> ) or not ( <code>false</code> ).	Small, 58.0	58.0
isPriority	Boolean	Indicates whether it is a priority field ( <code>true</code> ) or not ( <code>false</code> ).	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: <ul style="list-style-type: none"> <li>• Between</li> <li>• DoesNotExistIn</li> <li>• Equals</li> <li>• ExistsIn</li> <li>• GreaterOrEqual</li> <li>• GreaterThan</li> <li>• LessOrEqual</li> <li>• LessThan</li> <li>• Matches</li> <li>• NotEquals</li> </ul>	Small, 58.0	58.0
sequence	Integer	Sequence in which input fields are processed.	Small, 58.0	58.0

Property Name	Type	Description	Filter Group and Version	Available Version
sortType	String	Type of sorting done on the rows of a decision table. Possible values are: <ul style="list-style-type: none"> <li>AscNullFirst</li> <li>AscNullLast</li> <li>DescNullFirst</li> <li>DescNullLast</li> <li>None</li> </ul>	Small, 58.0	58.0
usage	String	Usage type for a field. Possible values are: <ul style="list-style-type: none"> <li>Input</li> <li>Output</li> </ul>	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: <ul style="list-style-type: none"> <li>Contains</li> <li>DoesNotContain</li> <li>Equals</li> <li>GreaterThan</li> <li>GreaterThanOrEqual</li> <li>IsNull</li> <li>IsNotNull</li> <li>LessThan</li> <li>LessThanOrEqual</li> <li>NotEqual</li> </ul>	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: <ul style="list-style-type: none"> <li>Formula</li> <li>Literal</li> </ul>	Small, 58.0	58.0

Property Name	Type	Description	Filter Group and Version	Available Version
		<ul style="list-style-type: none"> <li>Lookup</li> <li>Parameter</li> <li>PickList</li> </ul>		

## Lookup Table Details

Output representation of the basic details of a lookup table.

### JSON example

```
"lookupTables": [{
  "apiName": "DM_1",
  "id": "01Ixx0000000001EAA",
  "lookupTableDefinitionId": "9QNxx0000004C92GAE",
  "lookupTableType": "DecisionMatrix",
  "name": "DM_1"
},
{
  "apiName": "DT_2",
  "id": "01Ixx0000000003FEAQ",
  "lookupTableDefinitionId": "01Dxx000000001dEAA",
  "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": "01Ixx000000003FEAQ",
      "lookupTableDefinitionId": "01Dxx000000001dEAA",
      "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	<a href="#">Lookup Table Details[]</a>	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('a03xx000004WhyAAC');

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/v<sup>55.0</sup>/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
<code>description</code>	<p><b>Field Type</b> string</p> <p><b>Description</b> Describes a decision matrix definition.</p>
<code>groupKey</code>	<p><b>Field Type</b> string</p> <p><b>Description</b> A key for grouping matrix rows in different versions, such as a geographic region or a product code.</p>
<code>label</code>	<p><b>Field Type</b> string</p> <p><b>Description</b> Required. The UI label of a decision matrix definition.</p>
<code>processType</code>	<p><b>Field Type</b> ExpsSetProcessType (enumeration of type string)</p> <p><b>Description</b> The process type that uses the expression set rule. Valid values are:</p> <ul style="list-style-type: none"> <li>• Bre</li> <li>• GpaCalculation</li> <li>• PlanCostCalculation</li> <li>• RatingDiscovery</li> <li>• StudentSuccess</li> </ul> <p> <b>Note:</b> 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.</p> <p>Available in API version 59.0 and later.</p>

Field Name	Description
subGroupKey	<b>Field Type</b> string <b>Description</b> A subgroup key for grouping matrix rows in different versions, such as a geographic region or a product code. For example, if the <code>groupKey</code> is <code>Country</code> , the <code>subGroupKey</code> can be <code>State</code> or <code>Province</code> .
type	<b>Field Type</b> DecisionMatrixType (enumeration of type string) <b>Description</b> The type of a decision matrix. Valid values are: <ul style="list-style-type: none"> <li>• Grouped</li> <li>• Standard</li> </ul>
versions	<b>Field Type</b> <a href="#">DecisionMatrixDefinitionVersion</a> [] <b>Description</b> 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	<b>Field Type</b> <a href="#">DecisionMatrixDefinitionVersionColumn</a> [] <b>Description</b> Represents an array of columns in a decision matrix definition version.
decisionMatrixDefinition	<b>Field Type</b> string <b>Description</b> The full name of a decision matrix version.
endDate	<b>Field Type</b> dateTime <b>Description</b> The date until which a decision matrix definition version is available for use.

Field Name	Description
groupKeyValue	<p><b>Field Type</b> string</p> <p><b>Description</b> The value of the groupKey for a decision matrix definition version. For example, if the groupKey is Country, the groupKeyValue can be United States.</p>
label	<p><b>Field Type</b> string</p> <p><b>Description</b> Required. The UI label of a decision matrix definition version.</p>
startDate	<p><b>Field Type</b> dateTime</p> <p><b>Description</b> Required. The date from when a decision matrix definition version is available for use.</p>
status	<p><b>Field Type</b> DecisionMatrixDefStatus (enumeration of type string)</p> <p><b>Description</b> Required. Specifies the status of a decision matrix definition version. Valid values are:</p> <ul style="list-style-type: none"> <li>• Active</li> <li>• Draft</li> <li>• Inactive</li> <li>• InvalidDraft</li> <li>• Obsolete</li> </ul>
subGroupKeyValue	<p><b>Field Type</b> string</p> <p><b>Description</b> 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.</p>
versionNumber	<p><b>Field Type</b> int</p>

Field Name	Description
	<b>Description</b> 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	<b>Field Type</b> DecisionMatrixColumnType (enumeration of type string) <b>Description</b> Required. Specifies whether a column is for an input or output. Valid values are: <ul style="list-style-type: none"> <li>• Input</li> <li>• Output</li> </ul>
dataType	<b>Field Type</b> DecisionMatrixDataType (enumeration of type string) <b>Description</b> Required. The type of data that's stored in a column. Valid values are: <ul style="list-style-type: none"> <li>• Boolean</li> <li>• Currency</li> <li>• Number</li> <li>• NumberRange</li> <li>• Percent</li> <li>• Text</li> <li>• TextRange</li> </ul>
displaySequence	<b>Field Type</b> int <b>Description</b> Required. Represents the position of a column in the column order.

Field Name	Description
isWildcardColumn	<b>Field Type</b> boolean <b>Description</b> Required. Specifies whether a column stores a wildcard value ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> .
name	<b>Field Type</b> string <b>Description</b> Required. The full name of a decision matrix definition version column.
rangeValue	<b>Field Type</b> string <b>Description</b> A list of values that define range boundaries.
wildcardValue	<b>Field Type</b> string <b>Description</b> The wildcard value such as <code>ALL</code> .

## 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>
    </columns>
  </versions>
</DecisionMatrixDefinition>
```

```

    <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
<code>actionType</code>	InvokableActionType (enumeration of type string)	Required. The action type. Additional valid values only for Lookup Tables include: <ul style="list-style-type: none"> <li><code>runDecisionMatrix</code>—Invoke a decision matrix in a flow. This value is available in API version 55.0 and later.</li> </ul>

## 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()`, `describeObjects()`, `query()`, `retrieve()`, `update()`, `upsert()`

## Supported REST API Methods

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

## Fields

Field	Details
DeveloperName	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> The developer name of the decision matrix definition.</p>
FullName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Group, Nillable</p> <p><b>Description</b> 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.</p>
Language	<p><b>Type</b> picklist</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> The language in which this decision matrix definition is created. Possible values are:</p> <ul style="list-style-type: none"> <li>• da—Danish</li> <li>• de—German</li> <li>• en_US—English</li> <li>• es—Spanish</li> <li>• es_MX—Spanish (Mexico)</li> <li>• fi—Finnish</li> <li>• fr—French</li> <li>• it—Italian</li> <li>• ja—Japanese</li> <li>• ko—Korean</li> <li>• nl_NL—Dutch</li> <li>• no—Norwegian</li> <li>• pt_BR—Portuguese (Brazil)</li> <li>• ru—Russian</li> <li>• sv—Swedish</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>• th—Thai</li> <li>• zh_CN—Chinese (Simplified)</li> <li>• zh_TW—Chinese (Traditional)</li> </ul>
ManageableState	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Indicates the manageable state of the specified component that is contained in a package. Possible values are:</p> <ul style="list-style-type: none"> <li>• beta—Managed-Beta</li> <li>• deleted—Managed-Proposed-Deleted</li> <li>• deprecated—Managed-Proposed-Deprecated</li> <li>• deprecatedEditable—SecondGen-Installed-Deprecated</li> <li>• installed—Managed-Installed</li> <li>• installedEditable—SecondGen-Installed-Editable</li> <li>• released—Managed-Released</li> <li>• unmanaged—Unmanaged</li> </ul>
MasterLabel	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> The label of the decision matrix definition.</p>
Metadata	<p><b>Type</b> complexvalue</p> <p><b>Properties</b> Create, Nillable, Update</p> <p><b>Description</b> Decision matrix definition metadata.</p>
NamespacePrefix	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The namespace prefix associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix.</p>

## 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()`, `describeObjects()`, `query()`, `retrieve()`, `update()`, `upsert()`

### Supported REST API Methods

DELETE, GET, HEAD, PATCH, POST, Query

### Fields

Field	Details
DecisionMatrixDefinitionId	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> The decision matrix definition associated with this decision matrix definition version. This is a required field.  This field is a relationship field.</p> <p><b>Relationship Name</b> DecisionMatrixDefinition</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> DecisionMatrixDefinition</p>
DeveloperName	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> The developer name of the decision matrix definition version.</p>
FullName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Group, Nillable</p> <p><b>Description</b> 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.</p>

Field	Details
Language	<p><b>Type</b> picklist</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> The language in which this decision matrix definition version is created. Possible values are:</p> <ul style="list-style-type: none"> <li>• da—Danish</li> <li>• de—German</li> <li>• en_US—English</li> <li>• es—Spanish</li> <li>• es_MX—Spanish (Mexico)</li> <li>• fi—Finnish</li> <li>• fr—French</li> <li>• it—Italian</li> <li>• ja—Japanese</li> <li>• ko—Korean</li> <li>• nl_NL—Dutch</li> <li>• no—Norwegian</li> <li>• pt_BR—Portuguese (Brazil)</li> <li>• ru—Russian</li> <li>• sv—Swedish</li> <li>• th—Thai</li> <li>• zh_CN—Chinese (Simplified)</li> <li>• zh_TW—Chinese (Traditional)</li> </ul>
ManageableState	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Indicates the manageable state of the specified component that is contained in a package. Possible values are:</p> <ul style="list-style-type: none"> <li>• beta—Managed-Beta</li> <li>• deleted—Managed-Proposed-Deleted</li> <li>• deprecated—Managed-Proposed-Deprecated</li> <li>• deprecatedEditable—SecondGen-Installed-Deprecated</li> <li>• installed—Managed-Installed</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>installedEditable—SecondGen-Installed-Editable</li> <li>released—Managed-Released</li> <li>unmanaged—Unmanaged</li> </ul>
MasterLabel	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> The label of the decision matrix definition version.</p>
Metadata	<p><b>Type</b> complexvalue</p> <p><b>Properties</b> Create, Nillable, Update</p> <p><b>Description</b> Decision matrix definition version metadata.</p>
NamespacePrefix	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The namespace prefix associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix.</p>
Status	<p><b>Type</b> picklist</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> The status of this decision matrix definition version. Possible values are:</p> <ul style="list-style-type: none"> <li>Active</li> <li>Draft</li> <li>Inactive</li> <li>InvalidDraft</li> <li>Obsolete</li> </ul> <p>The default value is Draft.</p>

Field	Details
VersionNumber	<b>Type</b> int <b>Properties</b> Filter, Group, Sort <b>Description</b> 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()`, `describeObjects()`, `query()`, `retrieve()`, `update()`, `upsert()`

## Supported REST API Methods

DELETE, GET, HEAD, PATCH, POST, Query

## Fields

Field	Details
CollectOperator	<b>Type</b> string <b>Properties</b> Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort <b>Description</b> For internal use only.
ConditionCriteria	<b>Type</b> string <b>Properties</b> Filter, Group, Nillable, Sort <b>Description</b> Custom logic that's used to decide how the input fields are processed.
ConditionType	<b>Type</b> picklist

Field	Details
	<p><b>Properties</b> Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Condition logic that's used for input fields. Possible values are:</p> <ul style="list-style-type: none"> <li>• All—All conditions are met (AND)</li> <li>• Any—Any condition is met (OR)</li> <li>• Custom—Custom Logic</li> </ul> <p>The default value is 'All'.</p>
DataSourceType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Type of data source that's used to create a decision table. Available in API version 59.0 and later. Valid values are:</p> <ul style="list-style-type: none"> <li>• MultipleSubjects—Multiple sObjects</li> <li>• SingleSubject—Single sObject</li> </ul> <p>The default value is SingleSubject.</p>
DecisionTableParameters	<p><b>Type</b> <a href="#">QueryResult</a></p> <p><b>Properties</b> Nillable</p> <p><b>Description</b> Input or output field in a decision table.</p>
DecisionTableSourceCriteria	<p><b>Type</b> <a href="#">QueryResult</a></p> <p><b>Properties</b> Nillable</p> <p><b>Description</b> Filter criteria that's associated with the decision table condition. Available in API version 59.0 and later.</p>
Description	<p><b>Type</b> textarea</p>

Field	Details
	<p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> Description of the decision table.</p>
DeveloperName	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> Developer name of the decision table.</p>
DoesConsiderNullValue	<p><b>Type</b> boolean</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Nillable, Sort</p> <p><b>Description</b> Indicates whether a column that has a null value is considered for lookup (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>. Available in API version 60.0 and later.</p>
FilterResultBy	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> If a collection of inputs returns multiple matching outputs, then the <code>FilterResultBy</code> field specifies how the results of a decision table are filtered.  Available in API version 59.0 and later.  Valid values are:</p> <ul style="list-style-type: none"> <li>• <code>AnyValue</code>—Any Value</li> <li>• <code>FirstMatch</code>—First Match</li> <li>• <code>OutputOrder</code>—Output Order</li> </ul>
FullName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Group, Nillable</p> <p><b>Description</b> Name of the decision table.</p>

Field	Details
	<p>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.</p>
Language	<p><b>Type</b> picklist</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Language in which the decision table is created.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• da—Danish</li> <li>• de—German</li> <li>• en_US—English</li> <li>• es—Spanish</li> <li>• es_MX—Spanish (Mexico)</li> <li>• fi—Finnish</li> <li>• fr—French</li> <li>• it—Italian</li> <li>• ja—Japanese</li> <li>• ko—Korean</li> <li>• nl_NL—Dutch</li> <li>• no—Norwegian</li> <li>• pt_BR—Portuguese (Brazil)</li> <li>• ru—Russian</li> <li>• sv—Swedish</li> <li>• th—Thai</li> <li>• zh_CN—Chinese (Simplified)</li> <li>• zh_TW—Chinese (Traditional)</li> </ul>
LastSyncDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> Latest date on which the decision table was refreshed.</p>
ManageableState	<p><b>Type</b> ManageableState enumerated list</p>

Field	Details
	<p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Indicates the manageable state of the specified component that is contained in a package:</p> <ul style="list-style-type: none"> <li>• beta</li> <li>• deleted</li> <li>• deprecated</li> <li>• deprecatedEditable</li> <li>• installed</li> <li>• installedEditable</li> <li>• released</li> <li>• unmanaged</li> </ul>
MasterLabel	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> Label of the decision table.</p>
Metadata	<p><b>Type</b> complexvalue</p> <p><b>Properties</b> Create, Nillable, Update</p> <p><b>Description</b> Metadata of the decision table.</p> <p>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.</p>
NamespacePrefix	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> 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 <b><code>namespacePrefix__componentName</code></b> notation.</p> <p>The namespace prefix can have one of the following values.</p>

Field	Details
	<ul style="list-style-type: none"> <li>In Developer Edition orgs, <code>NamespacePrefix</code> 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.</li> <li>In orgs that aren't Developer Edition orgs, <code>NamespacePrefix</code> is set only for objects that are part of an installed managed package. All other objects have no namespace prefix.</li> </ul>
PricingElementDecisionTables	<p><b>Type</b> <code>QueryResult</code></p> <p><b>Properties</b> Nillable</p> <p><b>Description</b> Reserved for future use.</p>
RefreshFailureReason	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> Reason for the refresh of the decision table data to fail. Available in API version 60.0 and later.</p>
RefreshStatus	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Refresh status of the cached data in the decision table. Available in API version 60.0 and later. Valid values are:</p> <ul style="list-style-type: none"> <li>Initiated</li> <li>Failed</li> <li>Completed</li> <li>In Progress</li> </ul>
SetupName	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> Required. Name of the decision table, which appears in Setup.</p>

Field	Details
SourceConditionLogic	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> Condition logic that's used to define the decision table from the source data. Available in API version 59.0 and later.</p>
SourceObject	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> Required. Object that contains the rules based on which the decision table must provide outcomes.</p>
Status	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Restricted picklist, Sort</p> <p><b>Description</b> Required. Status of the decision table. Valid values are:</p> <ul style="list-style-type: none"> <li>• ActivationInProgress</li> <li>• Active</li> <li>• Draft</li> <li>• Inactive</li> </ul>
Type	<p><b>Type</b> picklist</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Determine whether a decision table's data volume is high or low. Available in API version 59.0 and later. Valid values are:</p> <ul style="list-style-type: none"> <li>• HighVolume-Reserved for future use</li> <li>• LowVolume</li> <li>• HighScaleExecution</li> </ul> <p>The default value is LowVolume.</p>

Field	Details
UsageType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> 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.</p>

## 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()`, `describeObjects()`, `query()`, `retrieve()`, `update()`, `upsert()`

## Supported REST API Methods

DELETE, GET, HEAD, PATCH, POST, Query

## Fields

Field	Details
DecisionTableId	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> Required. The unique identifier of the associated decision table. This is a relationship field.</p> <p><b>Relationship Name</b> DecisionTable</p>

Field	Details
	<b>Relationship Type</b> Lookup <b>Refers To</b> DecisionTable
Description	<b>Type</b> textarea <b>Properties</b> Filter, Nillable, Sort <b>Description</b> The description of the dataset link.
DeveloperName	<b>Type</b> string <b>Properties</b> Filter, Group, Sort <b>Description</b> The developer name of the dataset link.
FullName	<b>Type</b> string <b>Properties</b> Create, Group, Nillable <b>Description</b> 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	<b>Type</b> boolean <b>Properties</b> Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort <b>Description</b> Indicates whether a dataset link is the default dataset link for a decision table.
Language	<b>Type</b> picklist <b>Properties</b> Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort

Field	Details
	<p><b>Description</b></p> <p>The language in which the dataset link is created.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• da—Danish</li> <li>• de—German</li> <li>• en_US—English</li> <li>• es—Spanish</li> <li>• es_MX—Spanish (Mexico)</li> <li>• fi—Finnish</li> <li>• fr—French</li> <li>• it—Italian</li> <li>• ja—Japanese</li> <li>• ko—Korean</li> <li>• nl_NL—Dutch</li> <li>• no—Norwegian</li> <li>• pt_BR—Portuguese (Brazil)</li> <li>• ru—Russian</li> <li>• sv—Swedish</li> <li>• th—Thai</li> <li>• zh_CN—Chinese (Simplified)</li> <li>• zh_TW—Chinese (Traditional)</li> </ul>
ManageableState	<p><b>Type</b></p> <p>ManageableState enumerated list</p> <p><b>Properties</b></p> <p>Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b></p> <p>Indicates the manageable state of the specified component that is contained in a package:</p> <ul style="list-style-type: none"> <li>• beta</li> <li>• deleted</li> <li>• deprecated</li> <li>• deprecatedEditable</li> <li>• installed</li> <li>• installedEditable</li> <li>• released</li> <li>• unmanaged</li> </ul>
MasterLabel	<p><b>Type</b></p> <p>string</p>

Field	Details
	<p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> The label of the dataset link.</p>
Metadata	<p><b>Type</b> complexvalue</p> <p><b>Properties</b> Create, Nillable, Update</p> <p><b>Description</b> 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.</p>
NamespacePrefix	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> 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 <b><i>namespacePrefix__componentName</i></b> notation.  The namespace prefix can have one of the following values.</p> <ul style="list-style-type: none"> <li>• In Developer Edition orgs, <b>NamespacePrefix</b> 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.</li> <li>• In orgs that are not Developer Edition orgs, <b>NamespacePrefix</b> is set only for objects that are part of an installed managed package. All other objects have no namespace prefix.</li> </ul>
SetupName	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> Required. The name of the dataset link, which appears in Setup.</p>

Field	Details
SourceObject	<b>Type</b> string <b>Properties</b> Filter, Group, Nillable, Sort <b>Description</b> 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	<b>Type</b> reference <b>Properties</b> Create, Filter, Group, Sort <b>Description</b> The unique identifier of the associated decision table. This is a relationship field. <b>Relationship Name</b> DecisionTable <b>Relationship Type</b> Lookup <b>Refers To</b> DecisionTable
DomainObject	<b>Type</b> string <b>Properties</b> Create, Filter, Group, Sort

Field	Details
	<p><b>Description</b></p> <p>For polymorphic fields, indicates the domain object in the field hierarchy.</p> <p>This field is available in API version 59.0 and later.</p>
FieldName	<p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b></p> <p>The API name of the field that's selected as an input or output for the decision table.</p>
FieldPath	<p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b></p> <p>The path of the field used in a decision table in relation to the object that the field belongs to.</p> <p>This field is available in API version 59.0 and later.</p>
IsGroupByField	<p><b>Type</b></p> <p>boolean</p> <p><b>Properties</b></p> <p>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b></p> <p>Indicates whether an input field is used to group the business rules of the decision table (<code>true</code>) or not (<code>false</code>).</p> <p>The default value is <code>false</code>.</p> <p>This field is available in API version 55.0 and later.</p>
IsRequired	<p><b>Type</b></p> <p>boolean</p> <p><b>Properties</b></p> <p>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b></p> <p>Indicates whether a field is required to have input values when a look up is performed on the decision table (<code>true</code>) or not (<code>false</code>).</p> <p>The default value is <code>false</code>.</p> <p>This field is available in API version 59.0 and later.</p>

Field	Details
ManageableState	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Indicates the manageable state of the specified component that is contained in a package. Possible values are:</p> <ul style="list-style-type: none"> <li>• beta—Managed-Beta</li> <li>• deleted—Managed-Proposed-Deleted</li> <li>• deprecated—Managed-Proposed-Deprecated</li> <li>• deprecatedEditable—SecondGen-Installed-Deprecated</li> <li>• installed—Managed-Installed</li> <li>• installedEditable—SecondGen-Installed-Editable</li> <li>• released—Managed-Released</li> <li>• unmanaged—Unmanaged</li> </ul>
Operator	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The operator used for the input field. Possible values are:</p> <ul style="list-style-type: none"> <li>• DoesNotExistsIn</li> <li>• Contains</li> <li>• Equals</li> <li>• ExistsIn</li> <li>• GreaterOrEqual</li> <li>• GreaterThan</li> <li>• LessOrEqual</li> <li>• LessThan</li> <li>• Matches</li> <li>• DoesNotMatch</li> <li>• NotEquals</li> </ul>
Sequence	<p><b>Type</b> int</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<b>Description</b> The sequence in which input fields are processed.
SortType	<b>Type</b> picklist <b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update <b>Description</b> 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: <ul style="list-style-type: none"> <li>• AscNullFirst</li> <li>• AscNullLast</li> <li>• DescNullFirst</li> <li>• DescNullLast</li> <li>• None</li> </ul> The default value is None. Outputs can't be sorted based on picklist and multi-select picklist fields.
Usage	<b>Type</b> picklist <b>Properties</b> Create, Filter, Group, Restricted picklist, Sort, Update <b>Description</b> Required. The usage type of a field. Possible values are: <ul style="list-style-type: none"> <li>• INPUT</li> <li>• OUTPUT</li> </ul>

## 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	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> Required. The name of the field whose value must be compared against an input type decision table parameter when providing the outcome.</p>
DatasetSourceObject	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The object whose field values are evaluated by the associated decision table to provide outcomes.</p>
DecisionTableDatasetLinkId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> The unique identifier of the associated decision table dataset link.  This is a relationship field.</p> <p><b>Relationship Name</b> DecisionTableDatasetLink</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> DecisionTableDatasetLink</p>
DecisionTableParameterId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> Required. The unique identifier of the associated decision table parameter.  This is a relationship field.</p> <p><b>Relationship Name</b> DecisionTableParameter</p>

Field	Details
	<b>Relationship Type</b> Lookup <b>Refers To</b> DecisionTableParameter
ManageableState	<b>Type</b> ManageableState enumerated list <b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort <b>Description</b> Indicates the manageable state of the specified component that is contained in a package: <ul style="list-style-type: none"> <li>• beta</li> <li>• deleted</li> <li>• deprecated</li> <li>• deprecatedEditable</li> <li>• installed</li> <li>• installedEditable</li> <li>• released</li> <li>• unmanaged</li> </ul>

## 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	<b>Type</b> reference <b>Properties</b> Create, Filter, Group, Sort

Field	Details
	<p><b>Description</b> The ID of the decision table that's associated with the source criteria. This field is a relationship field.</p> <p><b>Relationship Name</b> DecisionTable</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> DecisionTable</p>
ManageableState	<p><b>Type</b> ManageableState enumerated list</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Indicates the manageable state of the specified component that is contained in a package:</p> <ul style="list-style-type: none"> <li>• beta</li> <li>• deleted</li> <li>• deprecated</li> <li>• deprecatedEditable</li> <li>• installed</li> <li>• installedEditable</li> <li>• released</li> <li>• unmanaged</li> </ul>
Operator	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> The operator that's applied to an associated decision table's field to filter the data. Possible values are:</p> <ul style="list-style-type: none"> <li>• DoesNotExistIn–Does Not Exist In</li> <li>• Equals</li> <li>• ExistsIn–Exists In</li> <li>• GreaterOrEqual–Greater Than Or Equal</li> <li>• GreaterThan–Greater Than</li> <li>• LessOrEqual–Less Than Or Equal</li> <li>• LessThan–Less Than</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>Matches</li> <li>NotEquals–Not Equals</li> </ul> <p>The default value is Equals.</p>
SequenceNumber	<p><b>Type</b> int</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The sequence number used in the associated decision table's source condition logic.</p>
SourceFieldName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The name of the field that's used in the decision table.</p>
Value	<p><b>Type</b> textarea</p> <p><b>Properties</b> Create, Nillable, Update</p> <p><b>Description</b> The value that's expected in the source field used in the decision table.</p>
ValueType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> The type of the value that's used to filter the source data. Possible values are:</p> <ul style="list-style-type: none"> <li>Formula</li> <li>Literal</li> <li>Lookup</li> <li>Parameter</li> <li>Picklist</li> </ul> <p>The default value is Literal.</p>

# Collections and Recovery

Use Collections data model to streamline the collection process. Create prioritized lists of collection plans. Create and manage promise to pay agreements for better management of overdue amounts.

## Collections Data Model

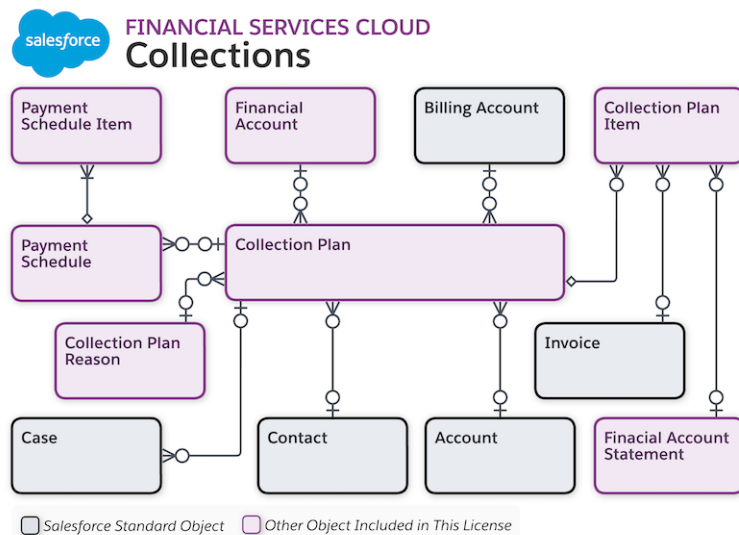
Learn about the objects and relationships used for Collections and Recovery.

## Collections Standard Objects

Use Collections standard objects and associated fields to create collection plan and related records.

### 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**.

# Collections Standard Objects

Use Collections standard objects and associated fields to create collection plan and related records.

## CollectionPlan

Represents details about the outstanding amounts linked to financial accounts, billing accounts, contacts, accounts, or cases associated with individuals or an organization. This object is available in API version 63.0 and later.

[CollectionPlanItem](#)

Represents an instance of a collection plan. This object is available in API version 63.0 and later.

[CollectionPlanReason](#)

Represents the reason for initiating the collection process, including non-payment of bills, bankruptcy, outstanding invoices, and deceased account holders. This object is available in API version 63.0 and later.

## CollectionPlan

Represents details about the outstanding amounts linked to financial accounts, billing accounts, contacts, accounts, or cases associated with individuals or an organization. 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
AccountId	<b>Type</b> reference <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> The account associated with the collection plan record. This field is a relationship field. <b>Relationship Name</b> Account <b>Refers To</b> Account
AutoDebitRequestCount	<b>Type</b> int <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> The count of the auto debit requests initiated for a collection plan.
ClosedDate	<b>Type</b> date <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update

Field	Details
	<b>Description</b> The date when the collection plan was closed.
CollectionPlanReasonId	<b>Type</b> reference <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> The ID of collection plan reason associated with the collection plan. This field is a relationship field. <b>Relationship Name</b> CollectionPlanReason <b>Refers To</b> CollectionPlanReason
CollectionPlanSegment	<b>Type</b> picklist <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> Specifies a predefined group associated with the collection plan record. The group is derived based on various criteria, such as collection amount and days past due.
ContactId	<b>Type</b> reference <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> The contact associated with the collection plan record. This field is a relationship field. <b>Relationship Name</b> Contact <b>Refers To</b> Contact
CurrentDueAmount	<b>Type</b> currency <b>Properties</b> Create, Filter, Sort, Update <b>Description</b> The current outstanding amount for the collection plan.

Field	Details
DaysPastDue	<p><b>Type</b> int</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The number of days that a payment is past its scheduled or expected due date.</p>
DueDate	<p><b>Type</b> date</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The date by which the organization or individuals are expected to make a payment towards the outstanding amount.</p>
FirstCallDateTime	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The timestamp when the first phone call is made to notify an individual or organization about the repayment of funds.</p>
FirstEmailDateTime	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The timestamp when the first email is sent to notify an individual or organization about the repayment of funds.</p>
FirstSmsDateTime	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The timestamp when the first message is sent to notify an individual or organization about the due amount.</p>
FinancialAccountId	<p><b>Type</b> reference</p>

Field	Details
	<p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The financial account associated with the collection plan record. This field is a relationship field.</p> <p><b>Relationship Name</b> FinancialAccount</p> <p><b>Refers To</b> FinancialAccount</p>
InitialDueAmount	<p><b>Type</b> currency</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The initial due amount of the collection plan.</p>
IsClosed	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> Indicates if the collection plan is active (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
LastReferencedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferencedDate</code> is not null, the user accessed this record or list view indirectly.</p>

Field	Details
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p><b>Description</b> The name of the collection plan record.</p>
OwnerId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> The ID of the owner of the collection plan record. This field is a polymorphic relationship field.</p> <p><b>Relationship Name</b> Owner</p> <p><b>Refers To</b> Group, User</p>
PromiseToPayCount	<p><b>Type</b> int</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The number of commitments made by an individual or an organization to repay the amount they owe within a specified timeframe.</p>
RiskScore	<p><b>Type</b> double</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The numerical score that is computed based on the Einstein model. This score is used to assess an individual's repayment capacity.</p>
SourceSystemRecordIdentifier	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p><b>Description</b> The unique identifier of the collection plan in an external system.</p>

Field	Details
Status	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> Specifies the status of the collection plan, such as new, in progress, promise to pay registered, promise to pay broken, and closed.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• Close</li> <li>• InProgress</li> <li>• New</li> </ul>
TotalFeesAmount	<p><b>Type</b> currency</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The sum of any fee amount associated with the collection plan. It includes any applicable surcharges, processing fees, penalties, and any other additional charges incurred.</p>
TotalInterestAmount	<p><b>Type</b> currency</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The cumulative sum of all interest charges accrued over a specified time period.</p>
TotalPaymentsReceived	<p><b>Type</b> currency</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> Total amount of payments received that are associated with a collection plan.</p> <p>Available in API version 63.0 and later.</p>
TotalTaxAmount	<p><b>Type</b> currency</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The total tax amount of the collection plan.</p>

Field	Details
UsageType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> Name of the cloud or the function that uses the Collections feature. Possible values are:</p> <ul style="list-style-type: none"> <li>• Automotive</li> <li>• Billing</li> <li>• Financial Services Cloud</li> </ul>

## CollectionPlanItem

Represents an instance of a collection plan. 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
CollectionPlanId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> The ID of the parent collection plan associated with the collection plan item record. This field is a relationship field.</p> <p><b>Relationship Name</b> CollectionPlan</p> <p><b>Relationship Type</b> Master-detail</p> <p><b>Refers To</b> CollectionPlan (the master object)</p>
FinancialAccountStatementId	<p><b>Type</b> reference</p>

Field	Details
	<p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Financial account statement associated with the collection plan item record.  This field is a relationship field.</p> <p><b>Relationship Name</b> FinancialAccountStatement</p> <p><b>Refers To</b> FinancialAccountStatement</p>
Invoice	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The invoice associated with the collection plan item record.  This field is a relationship field.</p> <p><b>Relationship Name</b> Invoice</p> <p><b>Refers To</b> Invoice</p>
LastReferencedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp when the current user last viewed this record or list view. If this value is null, and &lt;parname&gt;LastReferenceDate&lt;/parname&gt; is not null, the user accessed this record or list view indirectly.</p>
Name	<p><b>Type</b> string</p>

Field	Details
	<b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort
	<b>Description</b> The name of the collection plan item record.
SourceSystemRecordIdentifier	<b>Type</b> string
	<b>Properties</b> Create, Filter, Group, idLookup, Nillable, Sort, Update
	<b>Description</b> The unique identifier of the collection plan item in an external system.
Status	<b>Type</b> picklist
	<b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	<b>Description</b> Specifies the status of the collection plan item, such as new, pending, paid, and closed. Possible values are: <ul style="list-style-type: none"> <li>• New</li> <li>• Paid</li> <li>• Pending</li> <li>• Closed</li> </ul>

## CollectionPlanReason

Represents the reason for initiating the collection process, including non-payment of bills, bankruptcy, outstanding invoices, and deceased account holders. 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
Code	<b>Type</b> string

Field	Details
	<b>Properties</b> Create, Filter, Group, Sort, Update <b>Description</b> A unique code that represents the collection plan reason.
Description	<b>Type</b> string <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> A description of the reason for initiating the collection.
IsActive	<b>Type</b> boolean <b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update <b>Description</b> Indicates if the collection plan reason is active ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> .
LastReferencedDate	<b>Type</b> dateTime <b>Properties</b> Filter, Nillable, Sort <b>Description</b> The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	<b>Type</b> dateTime <b>Properties</b> Filter, Nillable, Sort <b>Description</b> The timestamp when the current user last viewed this record or list view. If this value is null, and <code>&lt;parname&gt;LastReferenceDate&lt;/parname&gt;</code> is not null, the user accessed this record or list view indirectly.
Name	<b>Type</b> string <b>Properties</b> Create, Filter, Group, idLookup, Sort, Update

Field	Details
	<b>Description</b> The reason for initiating the collection.
OwnerId	<b>Type</b> reference  <b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update  <b>Description</b> The ID of the owner of the collection plan reason record. This field is a relationship field.  <b>Relationship Name</b> Owner  <b>Refers To</b> User

## Context Service

Simplify the sharing and consumption of business application data using Context Service. Acting as a generic module, Context Service forms a layer between applications and procedures, enabling easy retrieval and use of data across various industry clouds at every step of the process.

### [Context Service Metadata API Types](#)

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

### [Context Service 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.

### [Context Persistence Platform Event](#)

Use the ContextPersistence event to notify subscribers after a context persistence event has completed its execution is processed.

### [Context Service Business APIs](#)

Context Service Business APIs are RESTful APIs that are sometimes available as Apex classes and methods.

### [Context Service Apex Reference](#)

Use the built-in Apex class to manage the processes of a context service.

## Context Service Metadata API Types

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

### [ContextDefinition](#)

Represents the details of a context definition that describe the relationship between the node structures within a context.

## ContextDefinition

Represents the details of a context definition that describe the relationship between the node structures within a context.



**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

ContextDefinition components have the suffix `.contextDefinition` and are stored in the `contextDefinitions` folder.

## Version

ContextDefinition components are available in API version 59.0 and later.

## Special Access Rules

Enable the organization preference `ContextDefinitionsEnabled` to access the ContextDefinition metadata type.

## Fields

Field Name	Description
<code>canBeReferenceDefinition</code>	<b>Field Type</b> boolean  <b>Description</b> Indicates whether the context definition can be referred by other context definitions ( <code>true</code> ) or not ( <code>false</code> ). Available in API version 63.0 and later.  The default value is <code>false</code> .
<code>clonedFrom</code>	<b>Field Type</b> string  <b>Description</b> The name of the context definition that's used to clone the current context definition.
<code>contextDefinitionReferences</code>	<b>Field Type</b> <a href="#">ContextDefinitionReference</a> []  <b>Description</b> References of the context definition.
<code>contextDefinitionVersions</code>	<b>Field Type</b> <a href="#">ContextDefinitionVersion</a> []

Field Name	Description
	<b>Description</b> Version of the context definition.
contextTtl	<b>Field Type</b> int <b>Description</b> Duration to persist the data, which is loaded in the run-time context instances created by this context definition, in the cache. The default value is 10 minutes.
description	<b>Field Type</b> string <b>Description</b> Description of the context definition.
hasSystemTags	<b>Field Type</b> boolean <b>Description</b> Indicates whether the context definition has system tags ( <code>true</code> ) or not ( <code>false</code> ). Available in API version 63.0 and later. The default value is <code>false</code> .
inheritedFrom	<b>Field Type</b> string <b>Description</b> Name of the parent context definition that's used to derive the current context definition.
inheritedFromVersion	<b>Field Type</b> string <b>Description</b> Version number of the parent definition that's used to derive the current context definition.
isProtected	<b>Field Type</b> boolean <b>Description</b> Auto-generated value that doesn't impact the behavior of the metadata type.
masterLabel	<b>Field Type</b> string

Field Name	Description
	<b>Description</b> Required. User-friendly name for the context definition, which is defined when the context definition is created.
title	<b>Field Type</b> string <b>Description</b> Required. Name of the context definition.

## ContextDefinitionReference

Represents details about the context definition reference.

Field Name	Description
inheritedFrom	<b>Field Type</b> string <b>Description</b> ID of the parent context definition reference that's used to derive the current context definition reference.
referenceContextDefinition	<b>Field Type</b> string <b>Description</b> Required. ID or name of the referred context definition.

## ContextDefinitionVersion

Represents details about the context definition version. Only one version can be active at a time.

Field Name	Description
contextMappings	<b>Field Type</b> <a href="#">ContextMapping[]</a> <b>Description</b> Mapping of attributes and nodes to related objects.

Field Name	Description
<code>contextNodes</code>	<b>Field Type</b> <code>ContextNode[]</code> <b>Description</b> Details of the structure of the nodes within the context.
<code>endDate</code>	<b>Field Type</b> <code>string</code> <b>Description</b> Date and time when the context definition version becomes inactive.
<code>isActive</code>	<b>Field Type</b> <code>boolean</code> <b>Description</b> Indicates whether the context definition version is active ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> .
<code>startDate</code>	<b>Field Type</b> <code>string</code> <b>Description</b> Required. Date and time when the context definition version becomes active.
<code>versionNumber</code>	<b>Field Type</b> <code>int</code> <b>Description</b> Required. Version number of the context definition.

## ContextMapping

Represents the mapping of attributes and nodes to related objects.

Field Name	Description
<code>contextMappingIntents</code>	<b>Field Type</b> <code>ContextMappingIntent[]</code> <b>Description</b> Purpose associated to a context mapping.
<code>contextNodeMappings</code>	<b>Field Type</b> <code>ContextNodeMapping[]</code>

Field Name	Description
	<b>Description</b> Mapping of the node in the context and values in the input schema.
default	<b>Field Type</b> boolean <b>Description</b> Indicates whether the mapping for a context definition version is default ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> .
description	<b>Field Type</b> string <b>Description</b> Description of the context mapping.
inheritedFrom	<b>Field Type</b> string <b>Description</b> Name of the parent mapping that's used to derive the current mapping.
title	<b>Field Type</b> string <b>Description</b> Required. Name of the context mapping.

## ContextMappingIntent

Represents the purpose associated to a context mapping.

Field Name	Description
mappingIntent	<b>Field Type</b> ContextMappingIntentType (enumeration of type string) <b>Description</b> Required. Specifies the purpose that's used to identify the type of context mapping required. Valid values are: <ul style="list-style-type: none"><li>• Hydration</li><li>• Association</li></ul>

Field Name	Description
	<ul style="list-style-type: none"><li>• Persistence</li><li>• Translation</li></ul>

## ContextNodeMapping

Represents the relationship between the node in the context and values in the input schema.

Field Name	Description
contextAttributeMappings	<b>Field Type</b> <a href="#">ContextAttributeMapping[]</a> <b>Description</b> Mapping of the attribute defined in the context and the values in the related objects.
contextNode	<b>Field Type</b> string <b>Description</b> Context node record associated with the context node mapping.
inheritedFrom	<b>Field Type</b> string <b>Description</b> Name of the parent context node mapping that's used to derive the current context node mapping.
mappedContextDefinition	<b>Field Type</b> string <b>Description</b> API name of the context definition for existing context-to-context mappings.
object	<b>Field Type</b> string <b>Description</b> Name of the object used for the mapping.

## ContextAttributeMapping

Represents the relationship between the attributes defined in the context and the values in the related objects.

Field Name	Description
contextAttrHydrationDetails	<b>Field Type</b> <a href="#">ContextAttrHydrationDetail[]</a>

Field Name	Description
	<b>Description</b> Details of the SOQL (database) queries that fetch data for a chosen attribute from the input schema.
contextAttribute	<b>Field Type</b> string <b>Description</b> Context attribute record associated with the context attribute mapping.
contextInputAttributeName	<b>Field Type</b> string <b>Description</b> Required. Name of the input attribute.
ctxAttrHydrationCtxs	<b>Field Type</b> <a href="#">CtxAttrHydrationCtx[]</a> <b>Description</b> Query that fetches data for a chosen attribute from the input schema for context-to-context mapping.
inheritedFrom	<b>Field Type</b> string <b>Description</b> Name of the parent context attribute mapping that's used to derive the current context attribute mapping.

## ContextAttrHydrationDetail

Represents the SOQL (database) queries that fetch data for a chosen attribute from the input schema.

Field Name	Description
contextAttrHydrationDetails	<b>Field Type</b> <a href="#">ContextAttrHydrationDetail[]</a> <b>Description</b> Details of the query that fetches the data for the specific query attribute.
inheritedFrom	<b>Field Type</b> string

Field Name	Description
	<b>Description</b> Name of the parent context attribute hydration detail that's used to derive the current context attribute hydration detail.
objectName	<b>Field Type</b> string <b>Description</b> Required. Name of the object used for the attribute hydration detail.
queryAttribute	<b>Field Type</b> string <b>Description</b> Required. The SOQL query that is the source of the hydration.

### CtxAttrHydrationCtx

Represents the queries that fetch data for a chosen attribute from the input schema for context-to-context mapping.

Field Name	Description
contextQueryAttribute	<b>Field Type</b> string <b>Description</b> Required. Attribute in context definition that's the source of context hydration.
inheritedFrom	<b>Field Type</b> string <b>Description</b> Name of the parent context attribute hydration detail that's used to derive the current context attribute.

### ContextNodeAttrDictionary

Represents the relationship between a context node and the context attribute dictionary.

Field Name	Description
<code>contextAttrDictIdentifier</code>	<b>Field Type</b> string <b>Description</b> Required. Developer name of the context attribute dictionary.
<code>contextNodeTagPrefix</code>	<b>Field Type</b> string <b>Description</b> Required. Tag prefix of the context node that's used to create the unique identifier of the parent context node.

## ContextNode

Represents details of the structure of the nodes within the context. Each node can have other nodes related to them and attributes to describe the object. You can also define a hierarchy for the nodes.

Field Name	Description
<code>canonicalNode</code>	<b>Field Type</b> string <b>Description</b> Canonical node that's associated with the context node.
<code>contextAttributes</code>	<b>Field Type</b> <a href="#">ContextAttribute[]</a> <b>Description</b> Details of the attribute used to describe the context node.
<code>contextNodeAttrDictionaries</code>	<b>Field Type</b> <a href="#">ContextNodeAttrDictionary[]</a> <b>Description</b> Facilitates relationships between context node mapping and context dictionary. Additionally, it records the relationship between context node and context dictionary.
<code>contextTags</code>	<b>Field Type</b> <a href="#">ContextTag[]</a> <b>Description</b> Unique identifier of the attribute or node.

Field Name	Description
displayName	<b>Field Type</b> string <b>Description</b> Display name of the context node.
inheritedFrom	<b>Field Type</b> string <b>Description</b> Name of the parent context node that's used to derive the current context node.
title	<b>Field Type</b> string <b>Description</b> Required. Name of the context node.
transposable	<b>Field Type</b> boolean <b>Description</b> Indicates whether the data in the Context Node record can be converted to field names ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> .

## ContextAttribute

Represents details of an attribute used to describe a context node. Each node can have one or many associated attributes.

Field Name	Description
contextTags	<b>Field Type</b> <a href="#">ContextTag[]</a> <b>Description</b> Shortened name of the attribute or node.
dataType	<b>Field Type</b> ContextAttributeDataType (enumeration of type string) <b>Description</b> Required. Type of data that's stored in the context attribute. Valid values are: <ul style="list-style-type: none"><li>• <code>boolean</code></li></ul>

Field Name	Description
	<ul style="list-style-type: none"> <li>• currency</li> <li>• date</li> <li>• datetime</li> <li>• number</li> <li>• percent</li> <li>• picklist</li> <li>• reference</li> <li>• string</li> <li>• selfreference—Available in API version 63.0 and later.</li> </ul>
description	<p><b>Field Type</b> string</p> <p><b>Description</b> Description of the context attribute.</p>
displayName	<p><b>Field Type</b> string</p> <p><b>Description</b> Display name of the context attribute.</p>
domainSet	<p><b>Field Type</b> string</p> <p><b>Description</b> List of node references to show the parent-child relationship between the nodes in a definition.</p>
fieldType	<p><b>Field Type</b> ContextAttributeFieldType (enumeration of type string)</p> <p><b>Description</b> Required. List of node references to depict the parent-child relation between the nodes in a definition. Valid values are:</p> <ul style="list-style-type: none"> <li>• aggregate</li> <li>• input</li> <li>• inputoutput</li> <li>• output</li> </ul>
inheritedFrom	<p><b>Field Type</b> string</p>

Field Name	Description
	<b>Description</b> Name of the parent attribute that's used to derive the current attribute.
key	<b>Field Type</b> boolean <b>Description</b> Indicates whether the attribute is a key attribute in the node ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> .
title	<b>Field Type</b> string <b>Description</b> Required. Name of the context attribute.
transient	<b>Field Type</b> boolean <b>Description</b> Indicates if an attribute is skipped in context persistence ( <code>true</code> ) or not ( <code>false</code> ). Available in API version 63.0 and later. The default value is <code>false</code> .
value	<b>Field Type</b> boolean <b>Description</b> Indicates whether the attribute identifies as a value in a node ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> .

## ContextTag

Represents a unique identifier of an attribute or node instead of a fully qualified tag structure name.

Field Name	Description
title	<b>Field Type</b> string <b>Description</b> Required. Name of the context tag.

Field Name	Description
inheritedFrom	<b>Field Type</b> string
	<b>Description</b> Name of the parent context tag that's used to derive the current context tag.

## Declarative Metadata Sample Definition

The following is an example of a ContextDefinition component.

```
<?xml version="1.0" encoding="UTF-8"?>
<ContextDefinition xmlns="http://soap.sforce.com/2006/04/metadata">
  <fullName>Test</fullName>
  <contextDefinitionVersions>
    <contextMappings>
      <contextNodeMappings>
        <contextNodeAttrDictionaries>
          <contextAttrDictIdentifier>Context Attribute Dictionary
Name</contextAttrDictIdentifier>
          <contextNodeTagPrefix>Context Node Tag Prefix</contextNodeTagPrefix>
        </contextNodeAttrDictionaries>
        <contextAttributeMappings>
          <contextAttrHydrationDetails>
            <objectName>CustomAccount__c</objectName>
            <queryAttribute>Name</queryAttribute>

<inheritedFrom>StandardDefinition/version/CustomAccountMapping/Praneeth/AccountName/hydrationInfo-1</inheritedFrom>

          </contextAttrHydrationDetails>
          <ctxAttrHydrationCtxs>
            <contextQueryAttribute>StandardDefinition</contextQueryAttribute>

<inheritedFrom>StandardDefinition/version/AccountMapping/Praneeth/AccountName/ctxToCtxhydrationInfo-1</inheritedFrom>

          </ctxAttrHydrationCtxs>
          <contextAttribute>AccountName</contextAttribute>
          <contextInputAttributeName>AccountName</contextInputAttributeName>

<inheritedFrom>StandardDefinition/version/CustomAccountMapping/Praneeth/AccountName</inheritedFrom>

        </contextAttributeMappings>
        <contextAttributeMappings>
          <contextAttrHydrationDetails>
            <objectName>CustomAccount__c</objectName>
            <queryAttribute>CustomAccountName__c</queryAttribute>

<inheritedFrom>StandardDefinition/version/CustomAccountMapping/Praneeth/CustomAccountName/hydrationInfo-1</inheritedFrom>

          </contextAttrHydrationDetails>
          <ctxAttrHydrationCtxs>
```

```

        <contextQueryAttribute>StandardDefinition</contextQueryAttribute>

<inheritedFrom>StandardDefinition/version/AccountMapping/Praneeth/AccountName/ctxToCtxhydrationInfo-1</inheritedFrom>

        </ctxAttrHydrationCtxs>
        <contextAttribute>CustomAccountName</contextAttribute>
        <contextInputAttributeName>CustomAccountName</contextInputAttributeName>

<inheritedFrom>StandardDefinition/version/CustomAccountMapping/Praneeth/CustomAccountName</inheritedFrom>

        </contextAttributeMappings>
        <contextNode>Praneeth</contextNode>
        <object>CustomAccount__c</object>

<inheritedFrom>StandardDefinition/version/CustomAccountMapping/Praneeth</inheritedFrom>
        <mappedContextDefinition>CustomContextDefinition</mappedContextDefinition>

        </contextNodeMappings>
        <contextMappingIntents>
                <mappingIntent>hydration</mappingIntent>
        </contextMappingIntents>
        <default>true</default>
        <title>CustomAccountMapping</title>
<inheritedFrom>StandardDefinition/version/CustomAccountMapping</inheritedFrom>

</contextMappings>
<contextMappings>
        <contextNodeMappings>
                <contextNodeAttrDictionaries>
                        <contextAttrDictIdentifier>Context Attribute Dictionary
Name</contextAttrDictIdentifier>
                        <contextNodeTagPrefix>Context Node Tag Prefix</contextNodeTagPrefix>
                </contextNodeAttrDictionaries>
                <contextAttributeMappings>
                        <contextAttrHydrationDetails>
                                <objectName>Account</objectName>
                                <queryAttribute>Name</queryAttribute>
                        </contextAttrHydrationDetails>
                </contextAttributeMappings>
        </contextNodeMappings>
        <contextAttrHydrationDetails>
                <ctxAttrHydrationCtxs>
                        <contextQueryAttribute>StandardDefinition</contextQueryAttribute>
                </ctxAttrHydrationCtxs>
        </contextAttrHydrationDetails>

<inheritedFrom>StandardDefinition/version/AccountMapping/Praneeth/AccountName/ctxToCtxhydrationInfo-1</inheritedFrom>

        </ctxAttrHydrationCtxs>
        <contextAttribute>AccountName</contextAttribute>
        <contextInputAttributeName>AccountName</contextInputAttributeName>

<inheritedFrom>StandardDefinition/version/AccountMapping/Praneeth/CustomAccountName/AccountName</inheritedFrom>

```

```

        </contextAttributeMappings>
        <contextAttributeMappings>
            <contextAttrHydrationDetails>
                <objectName>Account</objectName>
                <queryAttribute>CustomAccountName__c</queryAttribute>
</inheritedFrom>StandardDefinition/version/AccountMapping/Praneeth/CustomAccountName/hydrationInfo-1</inheritedFrom>

            </contextAttrHydrationDetails>
            <ctxAttrHydrationCtxs>
                <contextQueryAttribute>StandardDefinition</contextQueryAttribute>

</inheritedFrom>StandardDefinition/version/AccountMapping/Praneeth/AccountName/ctxToCtxhydrationInfo-1</inheritedFrom>

            </ctxAttrHydrationCtxs>
            <contextAttribute>CustomAccountName</contextAttribute>
            <contextInputAttributeName>CustomAccountName</contextInputAttributeName>

</inheritedFrom>StandardDefinition/version/AccountMapping/Praneeth/CustomAccountName</inheritedFrom>

        </contextAttributeMappings>
        <contextNode>Praneeth</contextNode>
        <object>Account</object>

</inheritedFrom>StandardDefinition/version/AccountMapping/Praneeth</inheritedFrom>
        <mappedContextDefinition>CustomContextDefinition</mappedContextDefinition>

    </contextNodeMappings>
    <contextMappingIntents>
        <mappingIntent>persistence</mappingIntent>
    </contextMappingIntents>
    <description>Account Mapping</description>
    <default>>false</default>
    <title>AccountMapping</title>
    <inheritedFrom>StandardDefinition/version/AccountMapping</inheritedFrom>
</contextMappings>
<contextNodes>
    <contextNodeAttrDictionaries>
        <contextAttrDictIdentifier>Context Attribute Dictionary
Name</contextAttrDictIdentifier>
        <contextNodeTagPrefix>Context Node Tag Prefix</contextNodeTagPrefix>
    </contextNodeAttrDictionaries>
    <contextAttributes>
        <contextTags>
            <title>AccountName</title>

</inheritedFrom>StandardDefinition/version/Praneeth/AccountName/AccountName</inheritedFrom>

        </contextTags>
        <dataType>string</dataType>
        <fieldType>inputoutput</fieldType>

```

```

        <key>false</key>
        <title>AccountName</title>
        <displayName>AccountName</displayName>
        <description>Test Description</description>
        <value>false</value>

<inheritedFrom>StandardDefinition/version/Praneeth/AccountName</inheritedFrom>
    </contextAttributes>
    <contextAttributes>
        <dataType>string</dataType>
        <fieldType>inputoutput</fieldType>
        <key>false</key>
        <title>CustomAccountName</title>
        <value>false</value>
        <displayName>CustomAccountName</displayName>
        <description>Test Description</description>

<inheritedFrom>StandardDefinition/version/Praneeth/CustomAccountName</inheritedFrom>
    </contextAttributes>
    <contextTags>
        <title>Praneeth</title>
        <inheritedFrom>StandardDefinition/version/Praneeth/Praneeth</inheritedFrom>

    </contextTags>
    <title>Praneeth</title>
    <transposable>false</transposable>
    <inheritedFrom>StandardDefinition/version/Praneeth</inheritedFrom>
    <canonicalNode></canonicalNode>
    <displayName>Praneeth</displayName>
</contextNodes>
<endDate>2097-05-10 00:00:00</endDate>
<startDate>2023-05-10 00:00:00</startDate>
<versionNumber>1</versionNumber>
<isActive>true</isActive>
</contextDefinitionVersions>
<description>Test Description</description>
<contextTtl>10</contextTtl>
<inheritedFrom>StandardDefinition</inheritedFrom>
<inheritedFromVersion>1.0</inheritedFromVersion>
<clonedFrom>OriginalDefinition</clonedFrom>
<isProtected>false</isProtected>
<masterLabel>Test Label</masterLabel>
<title>TestTitle</title>
<displayName>TestTitle</displayName>
</ContextDefinition>

```

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

```

<Package xmlns="http://soap.sforce.com/2006/04/metadata">
    <types>
        <members>Test</members>
        <name>ContextDefinition</name>
    </types>
    <types>
        <members>Account.CustomAccountName__c</members>
    </types>

```

```

    <name>CustomField</name>
  </types>
  <types>
    <members>CustomAccount__c</members>
    <name>CustomObject</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](#).

## Context Service 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](#)

### [ContextAttrHydrationDetail](#)

Represents the SOQL (database) queries that fetch data for a chosen attribute from the input schema. This object is available in API version 59.0 and later.

### [ContextAttribute](#)

Represents information about an attribute used to describe a context node. Each node can have one or many attributes associated with it. This object is available in API version 59.0 and later.

### [ContextAttributeMapping](#)

Represents the relationship between the attribute defined in the context and the values in the related objects. This object is available in API version 59.0 and later.

### [ContextDefinition](#)

Represents information about a context definition. The context definition describes the relationship between the node structures within a context. This object is available in API version 59.0 and later.

### [ContextDefinitionReference](#)

Represents information about reference from one Context Definition to another Context Definition. This object is available in API version 60.0 and later.

### [ContextDefinitionSync](#)

Stores information for the sync operation of the custom definition with the standard definition. This object is available in API version 62.0 and later.

### [ContextDefinitionVersion](#)

Represents information about the context definition version. Only one version can be active at a time. This object is available in API version 59.0 and later.

### [ContextMapping](#)

Represents the mapping of both attributes and nodes to related objects. This object is available in API version 59.0 and later.

[ContextMappingIntent](#)

Represents the purpose associated to a context mapping. This object is available in API version 61.0 and later.

[ContextNode](#)

Represents information about the structure of the nodes within the context. Within a structure, each node can have other nodes related to them and attributes to describe the object. A hierarchy for the nodes can also be defined here. This object is available in API version 59.0 and later.

[ContextNodeAttrDictionary](#)

Represents the relationship between the ContextNodeMapping and ContextDictionary objects as a junction table. This object is available in API version 62.0 and later.

[ContextNodeMapping](#)

Represents the relationship between the node in the context and values in the input schema. This object is available in API version 59.0 and later.

[ContextTag](#)

Represents a shortened name of an attribute or node instead of its fully qualified tag structure name. This object is available in API version 59.0 and later.

[CtxAttrHydrationCtx](#)

Represents the queries that fetch the data for a chosen attribute from the input schema for context-to-context mapping. This object is available in API version 61.0 and later.

## ContextAttrHydrationDetail

Represents the SOQL (database) queries that fetch data for a chosen attribute from the input schema. 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
ContextAttributeMappingId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> The context attribute mapping record that's associated with the attribute hydration detail. This field is a relationship field.</p> <p><b>Relationship Name</b> ContextAttributeMapping</p>

Field	Details
	<b>Relationship Type</b> Lookup <b>Refers To</b> ContextAttributeMapping
ManageableState	<b>Type</b> picklist <b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort <b>Description</b> Indicates the manageable state of the specified component that is contained in a package. Possible values are: <ul style="list-style-type: none"> <li>• beta—Managed-Beta</li> <li>• deleted—Managed-Proposed-Deleted</li> <li>• deprecated—Managed-Proposed-Deprecated</li> <li>• deprecatedEditable—SecondGen-Installed-Deprecated</li> <li>• installed—Managed-Installed</li> <li>• installedEditable—SecondGen-Installed-Editable</li> <li>• released—Managed-Released</li> <li>• unmanaged—Unmanaged</li> </ul>
ObjectName	<b>Type</b> string <b>Properties</b> Create, Filter, Group, Sort, Update <b>Description</b> The name of the object used for the attribute hydration detail.
ParentHydrationDetailId	<b>Type</b> reference <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> The parent hydration detail attribute. Based on the attribute mapping, there can be more than one hydration information sources. This field is a relationship field. <b>Relationship Name</b> ParentHydrationDetail <b>Relationship Type</b> Lookup

Field	Details
	<b>Refers To</b> ContextAttrHydrationDetail
QueryAttribute	<b>Type</b> string  <b>Properties</b> Create, Filter, Group, Sort, Update  <b>Description</b> The SOQL or query that is the source of the hydration.
InheritedFrom	<b>Type</b> string  <b>Properties</b> Create, Filter, Nillable, Sort, Update  <b>Description</b> The name of the parent context attribute hydration detail that's used to derive the current context attribute hydration detail.  This field is available in API version 60.0 and later.

## ContextAttribute

Represents information about an attribute used to describe a context node. Each node can have one or many attributes associated with it. 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
ContextNodeId	<b>Type</b> reference  <b>Properties</b> Create, Filter, Group, Sort  <b>Description</b> The context node record that's associated with the context attribute.

Field	Details
	<p>This field is a relationship field.</p> <p><b>Relationship Name</b> ContextNode</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> ContextNode</p>
DataType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> Specifies the type of data that's stored in the context attribute. Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>boolean</code>—Boolean</li> <li>• <code>currency</code>—Currency</li> <li>• <code>date</code>—Date</li> <li>• <code>datetime</code>—Datetime</li> <li>• <code>number</code>—Number</li> <li>• <code>percent</code>—Percent</li> <li>• <code>picklist</code>—Picklist</li> <li>• <code>reference</code>—Reference</li> <li>• <code>string</code>—String</li> </ul> <p>The default value is <code>string</code>.</p>
DomainSet	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The list of node references to show a parent-child relationship between nodes in a definition.</p>
FieldType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> List of node references to depict parent/child relation between the nodes in a definition Possible values are:</p>

Field	Details
	<ul style="list-style-type: none"> <li>• <code>input</code>—INPUT</li> <li>• <code>inputoutput</code>—INPUTOUTPUT</li> <li>• <code>output</code>—OUTPUT</li> </ul> <p>The default value is <code>input</code>.</p>
<code>IsKey</code>	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> Indicates whether the attribute is a key attribute in the node (true) or not (false). The default value is <code>false</code>.</p>
<code>IsTransient</code>	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> Indicates if an attribute need to be skipped in context persistence. The default value is <code>false</code>.</p>
<code>IsValue</code>	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> Indicates the attribute that identifies as a value in a node. The default value is <code>false</code>.</p>
<code>ManageableState</code>	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Indicates the manageable state of the specified component that is contained in a package. Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>beta</code>—Managed-Beta</li> <li>• <code>deleted</code>—Managed-Proposed-Deleted</li> <li>• <code>deprecated</code>—Managed-Proposed-Deprecated</li> <li>• <code>deprecatedEditable</code>—SecondGen-Installed-Deprecated</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>• <code>installed</code>—Managed-Installed</li> <li>• <code>installedEditable</code>—SecondGen-Installed-Editable</li> <li>• <code>released</code>—Managed-Released</li> <li>• <code>unmanaged</code>—Unmanaged</li> </ul>
Title	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The name of the context attribute.</p>
InheritedFrom	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The name of the parent attribute that's used to derive the current attribute. This field is available in API version 60.0 and later.</p>

## ContextAttributeMapping

Represents the relationship between the attribute defined in the context and the values in the related 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

### Fields

Field	Details
ContextAttributeId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p><b>Description</b> The context attribute record associated with this context attribute mapping. This field is a relationship field.</p> <p><b>Relationship Name</b> ContextAttribute</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> ContextAttribute</p>
ContextInputAttributeName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> Stores the name of input attribute.</p>
ContextNodeMappingId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> The context node mapping record that's associated with the context attribute mapping. This field is a relationship field.</p> <p><b>Relationship Name</b> ContextNodeMapping</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> ContextNodeMapping</p>
ManageableState	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Indicates the manageable state of the specified component that is contained in a package. Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>beta</code>—Managed-Beta</li> <li>• <code>deleted</code>—Managed-Proposed-Deleted</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>• deprecated—Managed-Proposed-Deprecated</li> <li>• deprecatedEditable—SecondGen-Installed-Deprecated</li> <li>• installed—Managed-Installed</li> <li>• installedEditable—SecondGen-Installed-Editable</li> <li>• released—Managed-Released</li> <li>• unmanaged—Unmanaged</li> </ul>
InheritedFrom	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The name of the parent context attribute mapping that's used to derive the current context attribute mapping.  This field is available in API version 60.0 and later.</p>

## ContextDefinition

Represents information about a context definition. The context definition describes the relationship between the node structures within a context. This object is available in API version 59.0 and later.

### Supported SOAP API Calls

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

### Supported REST API Methods

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

### Fields

Field	Details
CanBeReferenceDefinition	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> Indicates whether the context definition can be referred by other context definitions (<code>true</code>) or not (<code>false</code>).  The default value is <code>false</code>.  This field is available in API version 63.0 and later.</p>

Field	Details
ClonedFrom	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The name of the context definition that's used to clone the current context definition.</p>
ContextTtl	<p><b>Type</b> int</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Displays how long you'd like the data that's loaded in the runtime context instances created by this context definition to stay in the cache.  The default value is 10 minutes.</p>
Description	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The description of the context definition.</p>
DeveloperName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The unique name of the context definition.</p>
DisplayName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The display name of the context definition.</p>
HasSystemTags	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p>

Field	Details
	<p><b>Description</b></p> <p>Indicates whether the context definition has system tags (<code>true</code>) or not (<code>false</code>).</p> <p>The default value is <code>false</code>.</p> <p>This field is available in API version 63.0 and later.</p>
InheritedFrom	<p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b></p> <p>The name of the parent context definition that's used to derive the current context definition.</p> <p>This field is available in API version 60.0 and later.</p>
InheritedFromVersion	<p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b></p> <p>The version number of the parent definition that's used to derive the current context definition.</p> <p>This field is available in API version 60.0 and later.</p>
Language	<p><b>Type</b></p> <p>picklist</p> <p><b>Properties</b></p> <p>Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b></p> <p>The language of the context definition.</p>
ManageableState	<p><b>Type</b></p> <p>picklist</p> <p><b>Properties</b></p> <p>Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b></p> <p>Indicates the manageable state of the specified component that is contained in a package</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>beta</code>—Managed-Beta</li> <li>• <code>deleted</code>—Managed-Proposed-Deleted</li> <li>• <code>deprecated</code>—Managed-Proposed-Deprecated</li> <li>• <code>deprecatedEditable</code>—SecondGen-Installed-Deprecated</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>• <code>installed</code>—Managed-Installed</li> <li>• <code>installedEditable</code>—SecondGen-Installed-Editable</li> <li>• <code>released</code>—Managed-Released</li> <li>• <code>unmanaged</code>—Unmanaged</li> </ul>
<code>MasterLabel</code>	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The UI label of the context definition.</p>
<code>NamespacePrefix</code>	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> 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 <code>namespacePrefix__componentName</code> notation.</p>
<code>Title</code>	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, idLookup, Sort, Update</p> <p><b>Description</b> The name of the context definition.</p>

## ContextDefinitionReference

Represents information about reference from one Context Definition to another Context Definition. 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`

## Fields

Field	Details
ContextDefinitionId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> The context definition record that's associated with the context definition reference. This field is a relationship field.</p> <p><b>Relationship Name</b> ContextDefinition</p> <p><b>Relationship Type</b> Master-detail</p> <p><b>Refers To</b> ContextDefinition</p>
InheritedFrom	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The name of the parent context definition that's used to derive the current context definition. This field is available in API version 60.0 and later.</p>
ManageableState	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Indicates the manageable state of the specified component that is contained in a package. Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>beta</code>—Managed-Beta</li> <li>• <code>deleted</code>—Managed-Proposed-Deleted</li> <li>• <code>deprecated</code>—Managed-Proposed-Deprecated</li> <li>• <code>deprecatedEditable</code>—SecondGen-Installed-Deprecated</li> <li>• <code>installed</code>—Managed-Installed</li> <li>• <code>installedEditable</code>—SecondGen-Installed-Editable</li> <li>• <code>released</code>—Managed-Released</li> <li>• <code>unmanaged</code>—Unmanaged</li> </ul>

Field	Details
ReferenceContextDefinition	<b>Type</b> picklist <b>Properties</b> Create, Filter, Group, Restricted picklist, Sort, Update <b>Description</b> Specifies the referred context definition.

## ContextDefinitionSync

Stores information for the sync operation of the custom definition with the standard definition. This object is available in API version 62.0 and later.

### Supported SOAP API Calls

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

### Supported REST API Methods

DELETE, GET, HEAD, PATCH, POST, Query

### Fields

Field	Details
ContextDefinitionName	<b>Type</b> string <b>Properties</b> Create, Filter, Group, Sort, Update <b>Description</b> The context definition the sync is running for.
EndDateTime	<b>Type</b> dateTime <b>Properties</b> Create, Filter, Nillable, Sort, Update <b>Description</b> The date and time when the synchronization ends.
Name	<b>Type</b> string <b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort

Field	Details
	<b>Description</b> The name of the context definition sync record. This is a default field created for a platform entity.
OwnerId	<b>Type</b> reference <b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update <b>Description</b> The ID of the owner who created the record. This field is a polymorphic relationship field. <b>Relationship Name</b> Owner <b>Refers To</b> Group, User
StartDateTime	<b>Type</b> dateTime <b>Properties</b> Create, Filter, Sort, Update <b>Description</b> The date and time when the synchronization starts.
Status	<b>Type</b> picklist <b>Properties</b> Create, Filter, Group, Restricted picklist, Sort, Update <b>Description</b> The status of the sync operation. Valid values are: <ul style="list-style-type: none"> <li>failed</li> <li>in_progress</li> <li>success</li> </ul>
SynchronizationInformation	<b>Type</b> textarea <b>Properties</b> Create, Nillable, Update <b>Description</b> The details of the context definition synchronization.

## ContextDefinitionVersion

Represents information about the context definition version. Only one version can be active at a time. This object is available in API version 59.0 and later.

### Supported SOAP API Calls

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

### Supported REST API Methods

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

### Fields

Field	Details
ContextDefinitionId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> The context definition record associated with the context definition version. This field is a relationship field.</p> <p><b>Relationship Name</b> ContextDefinition</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> ContextDefinition</p>
EndDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The date and time when the context definition version becomes inactive.</p>
IsActive	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> Indicates whether the context definition version is active (true) or not (false). The default value is <code>false</code>.</p>

Field	Details
ManageableState	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Indicates the manageable state of the specified component that is contained in a package. Possible values are:</p> <ul style="list-style-type: none"> <li>• beta—Managed-Beta</li> <li>• deleted—Managed-Proposed-Deleted</li> <li>• deprecated—Managed-Proposed-Deprecated</li> <li>• deprecatedEditable—SecondGen-Installed-Deprecated</li> <li>• installed—Managed-Installed</li> <li>• installedEditable—SecondGen-Installed-Editable</li> <li>• released—Managed-Released</li> <li>• unmanaged—Unmanaged</li> </ul>
StartDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Create, Filter, Sort, Update</p> <p><b>Description</b> The date and time when the context definition version becomes active.</p>
VersionNumber	<p><b>Type</b> int</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The context definition version number.</p>

## ContextMapping

Represents the mapping of both attributes and nodes to related 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`

## Fields

Field	Details
ContextDefinitionVersionId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> The context definition version record that's associated with the context mapping. This field is a relationship field.</p> <p><b>Relationship Name</b> ContextDefinitionVersion</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> ContextDefinitionVersion</p>
Description	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The description of the context mapping.</p>
IsDefault	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> Indicates whether the mapping for a context definition version is default (true) or not (false). The default value is <code>false</code>.</p>
ManageableState	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Indicates the manageable state of the specified component that is contained in a package. Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>beta</code>—Managed-Beta</li> <li>• <code>deleted</code>—Managed-Proposed-Deleted</li> <li>• <code>deprecated</code>—Managed-Proposed-Deprecated</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>• deprecatedEditable—SecondGen-Installed-Deprecated</li> <li>• installed—Managed-Installed</li> <li>• installedEditable—SecondGen-Installed-Editable</li> <li>• released—Managed-Released</li> <li>• unmanaged—Unmanaged</li> </ul>
Title	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The name of the context mapping.</p>
InheritedFrom	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The name of the parent mapping that's used to derive the current mapping.  This field is available in API version 60.0 and later.</p>

## ContextMappingIntent

Represents the purpose associated to a context mapping. This object is available in API version 61.0 and later.

### Supported Calls

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

### Supported REST API Methods

DELETE, GET, HEAD, PATCH, POST, Query

### Fields

Field	Details
ContextMappingId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p>

Field	Details
	<p><b>Description</b> The context mapping that's associated with usage intent. This field is a relationship field.</p> <p><b>Relationship Name</b> ContextMapping</p> <p><b>Relationship Type</b> Master-detail</p> <p><b>Refers To</b> ContextMapping (the master object)</p>
MappingIntent	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> Specifies the purpose to identify the type of context mapping required. Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>association</code>—Association</li> <li>• <code>hydration</code>—Hydration</li> <li>• <code>persistence</code>—Persistence</li> <li>• <code>translation</code>—Translation</li> </ul>

## ContextNode

Represents information about the structure of the nodes within the context. Within a structure, each node can have other nodes related to them and attributes to describe the object. A hierarchy for the nodes can also be defined here. 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
ContextDefinitionVersionId	<p><b>Type</b> reference</p>

Field	Details
	<p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> The context definition version record associated with the context node.  This field is a relationship field.</p> <p><b>Relationship Name</b> ContextDefinitionVersion</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> ContextDefinitionVersion</p>
IsTransposable	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> Indicates whether the data in the Context Node record can be converted to field names (true) or not (false).  The default value is <code>false</code>.</p>
ManageableState	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Indicates the manageable state of the specified component that is contained in a package.  Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>beta</code>—Managed-Beta</li> <li>• <code>deleted</code>—Managed-Proposed-Deleted</li> <li>• <code>deprecated</code>—Managed-Proposed-Deprecated</li> <li>• <code>deprecatedEditable</code>—SecondGen-Installed-Deprecated</li> <li>• <code>installed</code>—Managed-Installed</li> <li>• <code>installedEditable</code>—SecondGen-Installed-Editable</li> <li>• <code>released</code>—Managed-Released</li> <li>• <code>unmanaged</code>—Unmanaged</li> </ul>
Title	<p><b>Type</b> string</p>

Field	Details
	<b>Properties</b> Create, Filter, Group, Sort, Update <b>Description</b> The name of the context node.
InheritedFrom	<b>Type</b> string <b>Properties</b> Create, Filter, Nillable, Sort, Update <b>Description</b> The name of the parent context node that's used to derive the current context node. This field is available in API version 60.0 and later.
DisplayName	<b>Type</b> string <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> The display name of the context node. This field is available in API version 61.0 and later.
CanonicalNodeId	<b>Type</b> reference <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> The canonical node associated with the context node. This field is a relationship field. This field is available in API version 61.0 and later. <b>Relationship Name</b> CanonicalNode <b>Refers To</b> ContextNode

## ContextNodeAttrDictionary

Represents the relationship between the ContextNodeMapping and ContextDictionary objects as a junction table. This object is available in API version 62.0 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
ContextAttrrDictIdentifier	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The developer name of the context attribute dictionary.</p>
ContextNodeId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The ID of the context node. This field is a relationship field.</p> <p><b>Relationship Name</b> ContextNode</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> ContextNode</p>
ContextNodeMappingId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The ID of the context node mapping. This field is a relationship field.</p> <p><b>Relationship Name</b> ContextNodeMapping</p> <p><b>Relationship Type</b> Lookup</p>

Field	Details
	<b>Refers To</b> ContextNodeMapping
ContextNodeTagPrefix	<b>Type</b> string  <b>Properties</b> Create, Filter, Group, Sort, Update  <b>Description</b> The tag prefix of the context node that's used to create the unique identifier of the parent context node.

## ContextNodeMapping

Represents the relationship between the node in the context and values in the input schema. This object is available in API version 59.0 and later.

### Supported SOAP API Calls

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

### Supported REST API Methods

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

### Fields

Field	Details
ContextMappingId	<b>Type</b> reference  <b>Properties</b> Create, Filter, Group, Sort  <b>Description</b> The context mapping record that's associated with the context node mapping. This field is a relationship field.  <b>Relationship Name</b> ContextMapping  <b>Relationship Type</b> Lookup  <b>Refers To</b> ContextMapping

Field	Details
ContextNodeId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The context node record associated with this context node mapping. This field is a relationship field.</p> <p><b>Relationship Name</b> ContextNode</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> ContextNode</p>
ManageableState	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Indicates the manageable state of the specified component that is contained in a package. Possible values are:</p> <ul style="list-style-type: none"> <li>• beta—Managed-Beta</li> <li>• deleted—Managed-Proposed-Deleted</li> <li>• deprecated—Managed-Proposed-Deprecated</li> <li>• deprecatedEditable—SecondGen-Installed-Deprecated</li> <li>• installed—Managed-Installed</li> <li>• installedEditable—SecondGen-Installed-Editable</li> <li>• released—Managed-Released</li> <li>• unmanaged—Unmanaged</li> </ul>
Object	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The name of the object used for the mapping.</p>
InheritedFrom	<p><b>Type</b> string</p>

Field	Details
	<b>Properties</b> Create, Filter, Nillable, Sort, Update  <b>Description</b> The name of the parent context node mapping that's used to derive the current context node mapping.  This field is available in API version 60.0 and later.
MappedContextDefinition	<b>Type</b> string  <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update  <b>Description</b> The API name of the context definition when context-to-context mappings exist.  This field is available in API version 61.0 and later.

## ContextTag

Represents a shortened name of an attribute or node instead of its fully qualified tag structure name. This object is available in API version 59.0 and later.

### Supported SOAP API Calls

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

### Supported REST API Methods

DELETE, GET, HEAD, PATCH, POST, Query

### Fields

Field	Details
ContextAttributeId	<b>Type</b> reference  <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update  <b>Description</b> The context attribute record that's associated with the context tag.  This field is a relationship field.  <b>Relationship Name</b> ContextAttribute

Field	Details
	<b>Relationship Type</b> Lookup <b>Refers To</b> ContextAttribute
ContextNodeId	<b>Type</b> reference <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> The context node record that's associated with the context tag. This field is a relationship field. <b>Relationship Name</b> ContextNode <b>Relationship Type</b> Lookup <b>Refers To</b> ContextNode
Title	<b>Type</b> string <b>Properties</b> Create, Filter, Group, Sort, Update <b>Description</b> The name of the context tag.
InheritedFrom	<b>Type</b> string <b>Properties</b> Create, Filter, Nillable, Sort, Update <b>Description</b> The name of the parent context tag that's used to derive the current context tag. This field is available in API version 60.0 and later.

## CtxAttrHydrationCtx

Represents the queries that fetch the data for a chosen attribute from the input schema for context-to-context mapping This object is available in API version 61.0 and later.

## Supported Calls

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

## Supported REST API Methods

DELETE, GET, HEAD, PATCH, POST, Query

## Fields

Field	Details
ContextAttributeMappingId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> The context attribute mapping record that's associated with the attribute hydration detail. This field is a relationship field.</p> <p><b>Relationship Name</b> ContextAttributeMapping</p> <p><b>Relationship Type</b> Master-detail</p> <p><b>Refers To</b> ContextAttributeMapping (the master object)</p>
ContextQueryAttribute	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Sort, Update</p> <p><b>Description</b> The attribute in context definition that's the source of context hydration.</p>
InheritedFrom	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The name of the parent CtxAttrCtxHydrationDetail that's used to derive the current CtxAttrCtxHydrationDetail.</p>

# Context Persistence Platform Event

Use the ContextPersistence event to notify subscribers after a context persistence event has completed its execution is processed.

### ContextPersistenceEvent

Notifies subscribers when the Context Persistence event, initiated by the Context Persistence API has completed its execution. This event is designed to inform customers/clients about the success or failure of their Context Persistence request. This object is available in API version 59.0 and later.

## ContextPersistenceEvent

Notifies subscribers when the Context Persistence event, initiated by the Context Persistence API has completed its execution. This event is designed to inform customers/clients about the success or failure of their Context Persistence request. This object is available in API version 59.0 and later.

### Supported Calls

describeObjects()

### Supported Subscribers

Subscriber	Supported?
Apex Triggers	✓
Flows	✓
Processes	✓
Streaming API (CometD)	✓

### Streaming API Subscription Channel

/event/ContextPersistenceEvent

### Special Access Rules

The ContextPersistenceEvent is available when IndustriesContextService Org permission is enabled.

### Fields

Field	Details
Correlation Id	Type string

### EDITIONS

Available in: Lightning Experience

Available in Salesforce orgs when the admin settings for Context Service and for the product related to the use case are enabled. The Salesforce org must have the ContextService license.

Field	Details
	<b>Properties</b> Nillable <b>Description</b> The unique identifier of the parent request that this request belongs to.
EventUuid	<b>Type</b> string <b>Properties</b> Create <b>Description</b> Required. A universally unique identifier (UUID) that identifies a platform event message.
HasErrors	<b>Type</b> boolean <b>Properties</b> Nillable <b>Description</b> Indicates whether the context persistence service is a failure ( <code>true</code> ) or a success ( <code>false</code> ).
ReplayId	<b>Type</b> string <b>Properties</b> Nillable <b>Description</b> Represents an ID value that is populated by the system and refers to the position of the event in the event stream. Replay ID values aren't guaranteed to be contiguous for consecutive events. A subscriber can store a replay ID value and use it on resubscription to retrieve missed events that are within the retention window.
Request Identifier	<b>Type</b> string <b>Properties</b> Nillable <b>Description</b> The identifier of asynchronous or synchronous request associated with the event.

## Context Service Business APIs

Context Service Business APIs are RESTful APIs that are sometimes available as Apex classes and methods.

[REST Reference](#)

You can access the Context Service APIs using REST endpoints. These REST APIs follow similar conventions as Connect REST APIs.

## REST Reference

You can access the Context Service 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 Context Service API resources.

[Request Bodies](#)

Here's a list of Context Service API request bodies.

[Response Bodies](#)

Here's a list of Context Service response bodies.

### SEE ALSO:

[Connect REST API Developer Guide: Connect REST API Introduction](#)

## Resources

Here's a list of Context Service API resources.

[Context Definition](#)

Create a context definition, clone an existing context definition, extend a standard definition (file based definition) or persist entire context definition.

[Context Node](#)

Create new nodes, update existing nodes, retrieve or query node details, and delete nodes.

[Context Attribute](#)

Create new attributes, update existing ones, retrieve or query attribute details, and delete attributes.

[Context Tag](#)

Create tags for attributes or nodes, update existing context tags, retrieve or query specific tags, list all context tags, and delete tags.

[Context Node Mapping](#)

Create new node mappings, update existing ones, retrieve or query mapping details, and delete node mappings.

[Context Mapping](#)

Create new context mappings, update existing mappings, retrieve or query mapping details, and delete mappings.

[Context Service Runtime](#)

Create new runtime context instances, query data from context instances, and delete context instances.

[Context Persistence](#)

Persist context data to Salesforce database entities.

## Context Definition

Create a context definition, clone an existing context definition, extend a standard definition (file based definition) or persist entire context definition.

## Context Definition (GET, POST)

Create a context definition, clone an existing context definition, extend a standard definition (file based definition) or to persist entire context definition.

## Context Definition Id (GET, PATCH, DELETE)

Query, update, and delete a context definition using an ID.

### Context Definition (GET, POST)

Create a context definition, clone an existing context definition, extend a standard definition (file based definition) or to persist entire context definition.

## Resource

```
/connect/context-definitions
```

### Example for GET

`https://yourInstance.salesforce.com/services/data/v59.0/connect/context-definitions`

### Example for POST

`https://yourInstance.salesforce.com/services/data/v59.0/connect/context-definitions`

### Available version

59.0

### Requires Chatter

No

## HTTP methods

GET, POST

### Response body for GET

### Context Definition List

### Request body for POST

### JSON example

```
{
  "name": "Example Definition",
  "description": "Example Description",
  "developerName": "John Doe",
  "startDate": "2023-06-02T00:00:00.000Z",
  "endDate": "2025-06-20T00:00:00.000Z",
  "isActive": false,

  "payload": "{ \"contextDefinition\": { \"name\": \"ExampleDefinition\", \"description\": \"Example Description\", \"isActive\": true, \"startDate\": \"2023-06-02T00:00:00.000Z\", \"endDate\": \"2025-06-20T00:00:00.000Z\" } }"
}
```

```
{
  "sourceDefinitionId": "110xx0000007MnhEAE",
  "contextTtl": 30
}
```

### Properties

Name	Type	Description	Required or Optional	Available Version
contextTtl	Integer	Time to live (TTL) of context.	Optional	59.0
description	String	Short description of context definition.	Optional	59.0
developerName	String	Developer name.	Required	59.0
endDate	String	End date till context definition is valid.	Optional	59.0
isActive	Boolean	Specifies whether context is active ( <code>true</code> ) or not ( <code>false</code> ).	Optional	59.0
name	String	Name of the context definition.	Required	59.0
payload	String	JSON payload containing all the definitions and mappings.	Optional	59.0
sourceDefinitionId	String	Source context definition ID.	Optional	59.0
startDate	String	Start date from when context definition is valid.	Required	59.0

### Response body for POST

[Context Definition Information](#)

Context Definition Id (GET, PATCH, DELETE)

Query, update, and delete a context definition using an ID.

### Resource

```
/connect/context-definitions/{contextDefinitionId}
```

### Example for GET

```
https://yourInstance.salesforce.com/services/data/v59.0/connect/context-definitions/{contextDefinitionId}
```

### Example for PATCH

```
https://yourInstance.salesforce.com/services/data/v59.0/connect/context-definitions/{contextDefinitionId}
```

### Example for DELETE

```
https://yourInstance.salesforce.com/services/data/v59.0/connect/context-definitions/{contextDefinitionId}
```

### Available version

59.0

**Requires Chatter**

No

**HTTP methods**

GET, PATCH, DELETE

**Response body for GET**[Context Definition Output](#)**Request body for PATCH****JSON example**

```
{
  "definition": "Example Defintion patch",
  "description": "Example Description patch"
}
```

**Response body for PATCH**[Context Definition Information](#)**Context Node**

Create new nodes, update existing nodes, retrieve or query node details, and delete nodes.

[Context Node \(POST, PATCH\)](#)

Create and update context node.

[Context Node Id \(GET, DELETE\)](#)

Query and delete a context node using an Id.

**Context Node (POST, PATCH)**

Create and update context node.

**Resource**

```
/connect/context-definitions/{contextDefinitionId}/context-nodes
```

**Example for POST**

```
https://yourInstance.salesforce.com/services/data/v59.0/connect/context-definitions/{contextDefinitionId}/context-nodes
```

**Example for PATCH**

```
https://yourInstance.salesforce.com/services/data/v59.0/connect/context-definitions/{contextDefinitionId}/context-nodes
```

**Available version**

59.0

**Requires Chatter**

No

**HTTP methods**

POST, PATCH

Request body for POST

JSON example

```
{
  "contextNodes": [
    {
      "name": "Node_0",
      "attributes": {
        "contextAttributes": [
          {
            "dataType": "STRING",
            "fieldType": "INPUT",
            "name": "Attribute_1"
          }
        ]
      },
      "childNodes": {
        "contextNodes": [
          {
            "name": "Node_1",
            "attributes": {
              "contextAttributes": [
                {
                  "dataType": "NUMBER",
                  "fieldType": "INPUT",
                  "name": "Attribute_2"
                }
              ]
            }
          }
        ]
      }
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
attributes	<a href="#">Context Attributes</a> <a href="#">Input</a> []	List of context attributes.	Optional	59.0
childNodes	<a href="#">Context Nodes</a> <a href="#">Input</a> []	List of child context nodes.	Optional	59.0
contextNodeId	String	ID of the context node.	Required	59.0
isTransposable	Boolean	Specifies if the context node is used for the transposable feature ( <code>true</code> ) or not ( <code>false</code> ).	Optional	59.0
name	String	Name of the context node.	Required	59.0

Name	Type	Description	Required or Optional	Available Version
parentNodeId	String	ID of (parent) context node.	Optional	59.0
tags	<a href="#">Context Tag Input</a> []	List of context tags.	Optional	59.0

**Response body for POST**[Context Node List Output](#)**Request body for PATCH****JSON example**

```
{
  "contextNodes": [
    {
      "name": "Node_0_patch",
      "contextNodeId": "110xx000001G9D2AAK"
    }
  ]
}
```

**Response body for PATCH**[Context Node List Output](#)

Context Node Id (GET, DELETE)

Query and delete a context node using an Id.

**Resource**

```
/connect/context-definitions/{contextDefinitionId}/context-nodes/{contextNodeId}
```

**Example for GET**

```
https://yourInstance.salesforce.com/services/data/v59.0/connect/context-definitions/{contextDefinitionId}/context-nodes/{contextNodeId}
```

**Example for POST**

```
https://yourInstance.salesforce.com/services/data/v59.0/connect/context-definitions/{contextDefinitionId}/context-nodes/{contextNodeId}
```

**Available version**

59.0

**Requires Chatter**

No

**HTTP methods**

GET, DELETE

**Response body for GET**[Context Node Output](#) on page 587

## Context Attribute

Create new attributes, update existing ones, retrieve or query attribute details, and delete attributes.

### [Context Attribute \(POST, PATCH\)](#)

Create a list of context attributes.

### [Context Attribute ID \(GET, DELETE\)](#)

Query and delete a context attribute using an ID.

### [Context Attribute Mapping \(POST, PATCH\)](#)

Create context attribute mapping. Update context attribute mapping.

Context Attribute (POST, PATCH)

Create a list of context attributes.

### Resource

```
/connect/context-nodes/{contextNodeId}/context-attributes
```

### Example for POST

```
https://yourInstance.salesforce.com/services/data/v59.0/connect/context-nodes/{contextNodeId}/context-attributes
```

### Example for PATCH

```
https://yourInstance.salesforce.com/services/data/v59.0/connect/context-nodes/{contextNodeId}/context-attributes
```

### Available version

59.0

### Requires Chatter

No

### HTTP methods

POST, PATCH

### Request body for POST

#### JSON example

```
{
  "contextAttributes": [
    {
      "dataType": "STRING",
      "fieldType": "INPUT",
      "name": "Attribute_5",
      "tags": {
        "contextTags": [
          {
            "name": "Attribute_5_Tag"
          }
        ]
      }
    },
    {
      "dataType": "NUMBER",
```

```

        "fieldType": "OUTPUT",
        "name": "Attribute_6"
      }
    ]
  }
}

```

### Properties

Name	Type	Description	Required or Optional	Available Version
contextAttributeId	String	ID of the attribute.	Required	59.0
dataType	String	Data type of the attribute.	Required	59.0
domainSet	String	Comma separated node names referenced by this attribute.	Optional	59.0
fieldType	String	Field type of the attribute.	Required	59.0
isKey	Boolean	Specifies if it used for transposable feature ( <code>true</code> ) or not ( <code>false</code> ).	Optional	59.0
isValue	Boolean	Specifies if it used for transposable feature ( <code>true</code> ) or not ( <code>false</code> ).	Optional	59.0
name	String	Name of the attribute.	Required	59.0
tags	<a href="#">Context Tag Input[]</a>	List of tags for the attribute.	Optional	59.0

### Response body for POST

[Context Attribute List](#)

### Request body for PATCH

#### JSON example

```

{
  "contextAttributes": [
    {
      "name": "Attribute_5_Updated",
      "contextAttributeId": "11nxx000001hOvRAAU"
    },
    {
      "name": "Attribute_6_Updated",
      "contextAttributeId": "11nxx000001hOvSAAU"
    }
  ]
}

```

### Response body for PATCH

[Context Attribute List](#)

Context Attribute ID (GET, DELETE)

Query and delete a context attribute using an ID.

**Resource**

```
/connect/context-nodes/{contextNodeId}/context-attributes/{contextAttributeId}
```

**Example for GET**

```
https://yourInstance.salesforce.com/services/data/v59.0/connect/context-nodes/{contextNodeId}/context-attributes/{contextAttributeId}
```

**Example for DELETE**

```
https://yourInstance.salesforce.com/services/data/v59.0/connect/context-nodes/{contextNodeId}/context-attributes/{contextAttributeId}
```

**Available version**

59.0

**Requires Chatter**

No

**HTTP methods**

GET, DELETE

**Response body for GET**[Context Attribute Output](#)

Context Attribute Mapping (POST, PATCH)

Create context attribute mapping. Update context attribute mapping.

**Resource**

```
/connect/context-node-mappings/{contextNodeMappingId}/context-attribute-mappings
```

**Example for POST**

```
https://yourInstance.salesforce.com/services/data/v59.0/connect/context-node-mappings/{contextNodeMappingId}/context-attribute-mappings
```

**Example for PATCH**

```
https://yourInstance.salesforce.com/services/data/v59.0/connect/context-node-mappings/{contextNodeMappingId}/context-attribute-mappings
```

**Available version**

59.0

**Requires Chatter**

No

**HTTP methods**

POST, PATCH

**Request body for POST****JSON example**

```
{
  "contextAttributeMappings": [
    {
      "contextAttributeId": "11nxx000001hIgLAU",
      "hydrationDetails": {
        "contextAttrHydrationDetails": [
          {
```

```

        "sObjectDomain": "Order",
        "queryAttribute": "Status"
    }
    ]
}
},
{
    "contextAttributeId": "11nxx000001hKiFAAU",
    "hydrationDetails": {
        "contextAttrHydrationDetails": [
            {
                "sObjectDomain": "Order",
                "queryAttribute": "Name"
            }
        ]
    }
}
]
}

```

This example shows a JSON sample when context-to-context mappings exist.

```

{
    "contextMappings": [
        {
            "contextMappingId": "11jxx0000005UXnAAM",
            "contextNodeMappings": {
                "contextNodeMappings": [
                    {
                        "attributeMappings": {
                            "contextAttributeMappings": [
                                {
                                    "hydrationDetails": {
                                        "contextAttrContextHydrationDetails": [
                                            {
                                                "queryAttribute": "11nxx000001hGTFAA2",
                                                "parentAttributeMappingId": "11Rxx00000058LcEAI"
                                            }
                                        ]
                                    },
                                    "contextAttributeId": "11nxx000001ihzFAAQ",
                                    "contextInputAttributeName": "Node1A1"
                                }
                            ]
                        },
                        "contextNodeId": "11oxx000001HS0iAAG",
                        "mappedContextNodeId": "11oxx000001G0mSAAS",
                        "sObjectName": "Node1"
                    }
                ]
            },
            "intent": "ASSOCIATION",
            "intentId": "11jxx0000005UXnAAM"
        }
    ],
    "intent": "HYDRATION",
    "intentId": "11jxx0000005UXnAAM"
}

```

```
        "TRANSLATION"
      ],
      "mappedContextDefinitionName": "11Oxx0000006PZ8EAM",
      "isDefault": false
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
contextAttributeId	String	ID of the context attribute record.	Required	59.0
contextAttributeMappingId	String	ID of the context attribute mapping record.	Required	59.0
contextInputAttributeName	String	Context input attribute name.	Optional	59.0
hydrationDetails	<a href="#">Context Attribute Hydration Details Input[]</a>	List of context attribute hydration detail.	Optional	59.0

Response body for POST

[Context Attribute Mapping List Output](#)

Request body for PATCH

JSON example

```
{
  "contextAttributeMappings": [
    {
      "contextAttributeId": "11nxx000001hIgLAAU",
      "hydrationDetails": {
        "contextAttrHydrationDetails": [
          {
            "sObjectDomain": "Order",
            "queryAttribute": "Status"
          }
        ]
      }
    },
    {
      "contextAttributeId": "11nxx000001hKiFAAU",
      "hydrationDetails": {
        "contextAttrHydrationDetails": [
          {
            "sObjectDomain": "Order",
            "queryAttribute": "Name"
          }
        ]
      }
    }
  ]
}
```

```
    ]
  }
}
```

This example shows a JSON sample when context-to-context mappings exist.

```
{
  "contextMappings": [
    {
      "contextMappingId": "11jxx0000005UXnAAM",
      "contextNodeMappings": {
        "contextNodeMappings": [
          {
            "attributeMappings": {
              "contextAttributeMappings": [
                {
                  "hydrationDetails": {
                    "contextAttrContextHydrationDetails": [
                      {
                        "queryAttribute": "11nxx000001hGTFAA2",
                        "parentAttributeMappingId": "11Rxx00000058LcEAI"
                      }
                    ]
                  },
                  "contextAttributeId": "11nxx000001ihzFAAQ",
                  "contextInputAttributeName": "Node1A1"
                }
              ]
            },
            "contextNodeId": "110xx000001HS0iAAG",
            "mappedContextNodeId": "110xx000001G0mSAAS",
            "sObjectName": "Node1"
          }
        ]
      },
      "intents": [
        "ASSOCIATION",
        "HYDRATION",
        "PERSISTENCE",
        "TRANSLATION"
      ],
      "mappedContextDefinitionName": "11Oxx0000006PZ8EAM",
      "isDefault": false
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
contextAttributeId	String	ID of the context attribute record.	Required	59.0
contextAttributeMappingId	String	ID of the context attribute mapping record.	Required	59.0

Name	Type	Description	Required or Optional	Available Version
contextAttributeName	String	Context input attribute name.	Optional	59.0
hydrationDetails	<a href="#">Context Attribute Hydration Details Input[]</a>	List of context attribute hydration detail.	Optional	59.0

**Response body for PATCH**

[Context Attribute Mapping List](#)

**Context Tag**

Create tags for attributes or nodes, update existing context tags, retrieve or query specific tags, list all context tags, and delete tags.

[Context Tag \(GET, POST, PATCH\)](#)

Query, create, and update context tag.

[Context Tag ID \(GET, DELETE\)](#)

Query and delete a context tag.

Context Tag (GET, POST, PATCH)

Query, create, and update context tag.

**Resource**

```
/connect/context-definitions/{contextDefinitionId}/context-tags
```

**Example for GET**

```
https://yourInstance.salesforce.com/services/data/v59.0/connect/context-definitions/{contextDefinitionId}/context-tags
```

**Example for POST**

```
https://yourInstance.salesforce.com/services/data/v59.0/connect/context-definitions/{contextDefinitionId}/context-tags
```

**Example for PATCH**

```
https://yourInstance.salesforce.com/services/data/v59.0/connect/context-definitions/{contextDefinitionId}/context-tags
```

**Available version**

59.0

**Requires Chatter**


No

**HTTP methods**

GET, POST, PATCH

**Response body for GET**

[Context Tag List Output](#)

 **Note:** When the `includeReferencedDefinitionTag` query parameter is set to `true` in a GET request, the response will include the name of the context tag in the format `ContextDeveloperName.tagName`.

**Request body for POST**

**JSON example**

```
{
  "contextTags": [
    {
      "name": "Attribute_Tag",
      "contextAttributeId": "11nxx000001hOozAAE"
    },
    {
      "name": "Node_Tag",
      "contextNodeId": "11oxx000001G9D2AAK"
    }
  ]
}
```

**Properties**

Name	Type	Description	Required or Optional	Available Version
contextAttributeId	String	ID of the (parent) context attribute.	Required	59.0
contextNodeId	String	ID of the (parent) context node.	Required	59.0
contextTagId	String	ID of this Context tag. Required only for update.	Optional	59.0
name	String	Name of the context tag.	Required	59.0

**Response body for POST**

[Context Tag List Output](#)

**Request body for PATCH**

**JSON example**

```
{
  "contextTags": [
    {
      "name": "Updated_ATag",
      "contextTagId": "11kxx00000ZzcDpAAJ"
    }
  ]
}
```

**Response body for PATCH**

[Context Tag List Output](#)

Context Tag ID (GET, DELETE)

Query and delete a context tag.

**Resource**

```
/connect/context-definitions/${contextDefinitionId}/context-tags/${contextTagId}
```

**Example for GET**

```
https://yourInstance.salesforce.com/services/data/v59.0/connect/context-definitions/${contextDefinitionId}/context-tags/${contextTagId}
```

**Example for DELETE**

```
https://yourInstance.salesforce.com/services/data/v59.0/connect/context-definitions/${contextDefinitionId}/context-tags/${contextTagId}
```

**Available version**

59.0

**Requires Chatter**

No

**HTTP methods**

GET, DELETE

**Response body for GET**[Context Attribute Tag Output](#)**Context Node Mapping**

Create new node mappings, update existing ones, retrieve or query mapping details, and delete node mappings.

[Context Node Mapping Id \(GET, DELETE\)](#)

Query and delete a context node mapping using an ID.

[Context Node Mapping \(POST, PATCH\)](#)

Create and update context node mappings.

[Context Node Relationship \(POST\)](#)

Configure a relationship node by adding child context nodes to a specific context node.

Context Node Mapping Id (GET, DELETE)

Query and delete a context node mapping using an ID.

**Resource**

```
/connect/context-mappings/${contextMappingId}/context-node-mappings/${contextNodeMappingId}
```

**Example for GET**

```
https://yourInstance.salesforce.com/services/data/v59.0/connect/context-mappings/${contextMappingId}/context-node-mappings/${contextNodeMappingId}
```

**Example for DELETE**

```
https://yourInstance.salesforce.com/services/data/v59.0/connect/context-mappings/${contextMappingId}/context-node-mappings/${contextNodeMappingId}
```

**Available version**

59.0

**Requires Chatter**

No

HTTP methods

GET, DELETE

Response body for GET

[Context Node Mapping Output](#)

Context Node Mapping (POST, PATCH)

Create and update context node mappings.

Resource

```
/connect/context-mappings/{contextMappingId}/context-node-mappings
```

Example for POST

```
https://yourInstance.salesforce.com/services/data/v59.0/connect/context-mappings/{contextMappingId}/context-node-mappings
```

Example for PATCH

```
https://yourInstance.salesforce.com/services/data/v59.0/connect/context-mappings/{contextMappingId}/context-node-mappings
```

Available version

59.0

Requires Chatter

No

HTTP methods

POST, PATCH

Request body for POST

JSON example

```
{
  "contextNodeMappings": [
    {
      "contextNodeId": "110xx000001G31BAAS",
      "sObjectName": "Order"
    },
    {
      "contextNodeId": "110xx000001G31CAAS",
      "sObjectName": "OrderItem"
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
attributeMappings	<a href="#">Context Attribute Mappings Input</a> []	List of context attribute mappings.	Required	59.0
contextNodeId	String	Reference to context node.	Optional	59.0

Name	Type	Description	Required or Optional	Available Version
contextNodeMappingId	String	ID of this context node mapping. Required for update.	Required	59.0
sObjectName	String	SObject name.	Optional	59.0

**Response body for POST**[Context Node Mapping List Output](#)**Request body for PATCH****JSON example**

```
{
  "contextNodeMappings": [
    {
      "contextNodeMappingId": "11bxx000000YZipAAG",
      "sObjectName": "Quote"
    },
    {
      "contextNodeMappingId": "11bxx000000YZiqAAG",
      "sObjectName": "QuoteItem"
    }
  ]
}
```

**Response body for PATCH**[Context Node Mapping List Output](#)**Context Node Relationship (POST)**

Configure a relationship node by adding child context nodes to a specific context node.

**Resource**

```
/connect/context-nodes/contextNodeId/configurerelationship
```

The *contextNodeId* specifies the ID of the context node to which you want to add the context nodes from the request body as child nodes.

**Resource example**

```
https://yourInstance.salesforce.com/services/data/v63.0/connect/context-nodes/11bxx000001G3dtAAC/configurerelationship
```

**Available version**

61.0

**HTTP methods**

POST

**Request body for POST****JSON example**

```
{
  "contextNodeIds": [
```

```

    "110xx000001G3dtAAC",
    "110xx000001G3duAAC"
  ]
}
```

### Properties

Name	Type	Description	Required or Optional	Available Version
contextNodeIds	String	List of context node IDs to create the relationship nodes by adding them as child nodes to the context node that's specified in the endpoint.	Required	61.0

### Response body for POST

[Context Node List](#)

## Context Mapping

Create new context mappings, update existing mappings, retrieve or query mapping details, and delete mappings.

### [Context Mapping \(POST, PATCH\)](#)

Create and update context mappings.

### [Context Mapping Id \(GET, DELETE\)](#)

Query and delete a context mapping using an Id.

### [Context Attribute Mapping ID \(GET, DELETE\)](#)

Query and delete a context attribute mapping using an ID.

### Context Mapping (POST, PATCH)

Create and update context mappings.

### Resource

```
/connect/context-definitions/${contextDefinitionId}/context-mappings
```

### Example for POST

```
https://yourInstance.salesforce.com/services/data/v59.0/connect/context-definitions/${contextDefinitionId}/context-mappings
```

### Example for PATCH

```
https://yourInstance.salesforce.com/services/data/v59.0/connect/context-definitions/${contextDefinitionId}/context-mappings
```

### Available version

59.0

### Requires Chatter

No

### HTTP methods

POST, PATCH

Request body for POST

JSON example

```
{
  "contextMappings": [
    {
      "name": "ExampleMapping",
      "description": "Example Mapping Description",
      "isDefault": true,
      "intents": [
        "ASSOCIATION",
        "HYDRATION",
        "PERSISTENCE",
        "TRANSLATION"
      ]
    }
  ],
  "generateInputMappings": false,
  "generateObjectMappings": false
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
contextMappingId	String	ID of this context mapping. Required for update.	Required	59.0
contextNodeMappings	<a href="#">Context Node Mappings Input[]</a>	List of context node mappings.	Optional	59.0
description	String	Description of context mapping.	Optional	59.0
isDefault	Boolean	Indicates whether to make a default mapping for the context definition ( <code>true</code> ) or not ( <code>false</code> ).	Optional	59.0
intents	List<String>	<p>Purpose that's used to identify the type of required context mapping.</p> <p>Valid values are:</p> <ul style="list-style-type: none"><li>• <code>HYDRATION</code>—To load cache from a data source.</li><li>• <code>PERSISTENCE</code>—To load the sink objects from cache. Sink objects are the final destinations for the processed data.</li><li>• <code>ASSOCIATION</code>—To create a mapping without validating database relationships, attaching context structure nodes and their attributes</li></ul>	Optional	61.0

Name	Type	Description	Required or Optional	Available Version
		<p>with data source nodes and their attributes.</p> <ul style="list-style-type: none"> <li>TRANSLATION—To transform the data loaded in the cache to another representation defined by the mapping.</li> </ul>		
name	String	Name of the context mapping.	Required	59.0

**Response body for POST**[Context Mapping List Output](#)**Request body for PATCH****JSON example**

```
{
  "contextMappings": [
    {
      "contextMappingId": "11jxx0000005UXnAAM",
      "contextNodeMappings": {
        "contextNodeMappings": [
          {
            "attributeMappings": {
              "contextAttributeMappings": [
                {
                  "hydrationDetails": {
                    "contextAttrHydrationDetails": []
                  },
                  "contextAttributeId": "11nxx000001ihzFAQ",
                  "contextInputAttributeName": "Node1A1"
                }
              ]
            },
            "contextNodeId": "11oxx000001HS0iAAG",
            "sObjectName": "Node1"
          }
        ]
      }
    }
  ]
}
```

**Response body for PATCH**[Context Mapping List Output](#)

Context Mapping Id (GET, DELETE)

Query and delete a context mapping using an Id.

**Resource**

```
/connect/context-definitions/{contextDefinitionId}/context-mappings/{contextMappingId}
```

**Example for GET**

```
https://yourInstance.salesforce.com/services/data/v59.0/connect/context-definitions/{contextDefinitionId}/context-mappings/{contextMappingId}
```

**Example for DELETE**

```
https://yourInstance.salesforce.com/services/data/v59.0/connect/context-definitions/{contextDefinitionId}/context-mappings/{contextMappingId}
```

**Available version**

59.0

**Requires Chatter**

No

**HTTP methods**

GET, DELETE

**Response body for GET**[Context Mapping Output](#)

Context Attribute Mapping ID (GET, DELETE)

Query and delete a context attribute mapping using an ID.

**Resource**

```
/connect/context-node-mappings/{contextNodeMappingId}/context-attribute-mappings/{contextAttributeMappingId}
```

**Example for GET**

```
https://yourInstance.salesforce.com/services/data/v59.0/connect/context-node-mappings/{contextNodeMappingId}/context-attribute-mappings/{contextAttributeMappingId}
```

**Example for DELETE**

```
https://yourInstance.salesforce.com/services/data/v59.0/connect/context-node-mappings/{contextNodeMappingId}/context-attribute-mappings/{contextAttributeMappingId}
```

**Available version**

59.0

**Requires Chatter**

No

**HTTP methods**

GET, DELETE

**Response body for GET**[Context Attribute Mapping Output](#)**Context Service Runtime**

Create new runtime context instances, query data from context instances, and delete context instances.

[Context Service \(POST\)](#)

Create new context records by submitting metadata and associated JSON data. After validating the data, the system generates a new context ID.

[Context Service \(DELETE, GET\)](#)

Retrieve the context details using a context ID. Delete a context record using a context ID.

[Context Attribute \(PATCH\)](#)

Update attributes of a context record.

[Query Context Definition Interfaces \(GET\)](#)

Get the lists of metadata associated with context definition interfaces.

[Query Context Definition Interface By Name \(GET\)](#)

Get the details of a context definition interface by using the context definition interface name.

[Query Context Record \(POST\)](#)

Query a context record, with the option to retrieve child records.

[Query Record Status \(PATCH, POST\)](#)

Update the processing status and related error messages of query data records. Create the processing status and related error messages of query data records

[Query Tags \(POST\)](#)

Create query tags within a defined context

[Write Through Tags \(PATCH\)](#)

Update Context Attributes through tags.

## Context Service (POST)

Create new context records by submitting metadata and associated JSON data. After validating the data, the system generates a new context ID.

**Resource**

```
/connect/contexts
```

**Example**

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

**Available version**

59.0

**Requires Chatter**

No

**HTTP methods**

POST

**Request body for POST****JSON example**

```
{
  "metadata": {
    "contextDefinitionId": "110xx0000006VjNEAU",
    "mappingId": "11jxx0000004Q83AAE"
```

```

    },
    "data":
    [{"Order": [{"id": "TestOrder123", "businessObjectType": "Order", "Name": "Test
Get", "Status": "SHE", "Amount": "100", "Order": [{"id": "TestOrder1", "businessObjectType": "Order", "Name": "De", "id": "TestOrder2", "businessObjectType": "Order", "Name": "Es"}]}]}]
}

```

## Properties

Name	Type	Description	Required or Optional	Available Version
data	String	Payload containing context-specific information.	Required	59.0
metadata	Context MetaData Input	Metadata information about context.	Required	59.0

### Response body for POST

## Context Info

## Context Service (DELETE, GET)

Retrieve the context details using a context ID. Delete a context record using a context ID.

## Resource

```
/connect/contexts/${contextId}
```

### Example

<https://yourInstance.salesforce.com/services/data/v3.0/connect/contexts/c4c69a9a-3841-4fc3-a10d-a52779ade3d8>

### Available version

59.0

### Requires Chatter

No

## HTTP methods

DELETE, GET

### Response body for GET

### Context Info

### Response body for DELETE

None.

Context Attribute (PATCH)

Update attributes of a context record.

## Resource

```
/connect/contexts/attributes
```

Example for PATCH

```
https://yourInstance.salesforce.com/services/data/v63.0/connect/contexts/attributes
```

Available version

59.0

Requires Chatter

No

HTTP methods

PATCH


Request body for PATCH

JSON example

```
{
  "updateContextAttributesInput": {
    "contextId": "3729ed60-d16d-41b8-8951-9ad4f6407ad2",
    "nodePathAndAttributes": [
      {
        "nodePath": {
          "dataPath": [
            "UpdatedTestOrder789"
          ]
        },
        "attributes": [
          {
            "attributeName": "Status",
            "attributeValue": "IN TRANSIT"
          }
        ]
      }
    ]
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
updateContextAttributesInput	Object	Input object for updating context attributes.	Required	59.0

 **Note:** When a context definition is mapped to Account and a field is mapped to Account.RecordType.Name, updating the RecordType's ID does not update the mapped field. This is because updating the RecordType ID does not cause updates to other fields of the RecordType record.

Response body for PATCH

[Context Output](#)

## Query Context Definition Interfaces (GET)

Get the lists of metadata associated with context definition interfaces.

**Resource**

```
/connect/context-definition-interfaces
```

**Resource example**

```
https://yourInstance.salesforce.com/services/data/v63.0/connect/context-definition-interfaces
```

**Available version**

62.0

**HTTP methods**

GET

**Response body for GET**

[Context Definition Interface Metadata List](#)

## Query Context Definition Interface By Name (GET)

Get the details of a context definition interface by using the context definition interface name.

**Resource**

```
/connect/context-definition-interfaces/contextDefinitionInterfaceName
```

The *contextDefinitionInterfaceName* path parameter is the API name of the context definition interface.

**Resource example**

```
https://yourInstance.salesforce.com/services/data/v63.0/connect/context-definition-interfaces/exampleDefinitionInterface
```

**Available version**

62.0

**HTTP methods**

GET

**Response body for GET**

[Context Definition Interface](#)

## Query Context Record (POST)

Query a context record, with the option to retrieve child records.

**Resource**

```
/connect/contexts/query-record
```

**Examples**

```
https://yourInstance.salesforce.com/services/data/v63.0/connect/contexts/query-record
```

```
https://yourInstance.salesforce.com/services/data/v63.0/connect/contexts/query-record?children=false
```

**Available version**

59.0

**Requires Chatter**

No

**HTTP methods**

POST

**Request parameters for POST**

Parameter Name	Type	Description	Required or Optional	Available Version
children	Boolean	Indicates whether to retrieve child records true or not false.	Optional	59.0

**Request body for POST****JSON example**

```
{
  "contextId": "7bc695bc-f38b-4a94-8a95-0caa50f3da53"
}
```

**Properties**

Name	Type	Description	Required or Optional	Available Version
attributes	String[]	List of attributes to be retrieved.	Optional	58.0
businessObjectFilter	String	Filter based on a business object type.	Optional	58.0
contextId	String	The ID of the context to be queried.	Required	58.0
queryPath	String[]	Path to the parent node.	Optional	58.0

**Response body for POST**[Query Context Record Result](#)

Query Record Status (PATCH, POST)

Update the processing status and related error messages of query data records. Create the processing status and related error messages of query data records

**Resource**

```
/connect/contexts/query-record-status
```

**Example for PATCH**

```
https://yourInstance.salesforce.com/services/data/v63.0/connect/contexts/query-record-status/18732dfd
```

**Example for POST**

```
https://yourInstance.salesforce.com/services/data/v63.0/connect/contexts/query-record-status/18732dfd
```

Available version

59.0

Requires Chatter

No

HTTP methods

PATCH, POST

Response body for PATCH

[Context Output](#)

Request body for POST

JSON example

```
{
  "queryRecordStatusInput": {
    "contextId": "3729ed60-d16d-41b8-8951-9ad4f6407ad2",
    "queryPaths": [
      {
        "dataPath": [
          "TestOrder123"
        ]
      }
    ]
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
queryRecordStatusInput	Object	Input representation for context ID and the list of paths for querying the status.	Required	59.0

JSON example

```
{
  "contextId": "3729ed60-d16d-41b8-8951-9ad4f6407ad2",
  "queryPaths": [
    {
      "dataPath": [
        "TestOrder123"
      ]
    }
  ]
}
```

Response body for POST

[Query Record Status Result](#)

Query Tags (POST)

Create query tags within a defined context

**Resource**

```
/connect/contexts/query-tags
```

**Example**

```
https://yourInstance.salesforce.com/services/data/v63.0/connect/contexts/query-tags
```

**Available version**

59.0

**Requires Chatter**

No

**HTTP methods**

POST

**Request body for POST****JSON example**

```
{
  "contextId": "3729ed60-d16d-41b8-8951-9ad4f6407ad2",
  "tags": [
    "Order"
  ]
}
```

**Properties**

Name	Type	Description	Required or Optional	Available Version
contextId	String	ID of the context record.	Required	59.0
tags	String[]	List of query tags to be queried within this context.	Required	59.0

**Response body for POST**[Query Tags Result](#)**Write Through Tags (PATCH)**

Update Context Attributes through tags.

**Resource**

```
/connect/contexts/write-through-tags
```

**Available version**

63.0

**HTTP methods**

PATCH

Request body for PATCH

```
{
  "contextId": "3ec8da809ebd6cef79f685239fb005e8c7cffa075a0d3d7b1d8d17ec22bxxxxd",
  "nodePathAndTagValues": [
    {
      "nodePath": {
        "dataPath": [
          "001xx000003GbQSAA0"
        ]
      },
      "tagValues": [
        {
          "tagName": "Name",
          "tagValue": "updatedAccount"
        },
        {
          "tagName": "City",
          "tagValue": "Bangalore"
        }
      ]
    }
  ]
}
```

Request parameters for PATCH

Parameter Name	Type	Description	Required or Optional	Available Version
contextId	String	ID of context which will get updated.	Required	63.0
nodePathAndTagValues	List<Node PathAndTag ValuesInput Representation> on page 567	Node path which needs to update with tag details.	Required	63.0

Response body for PATCH

[ContextOutputRepresentation](#) on page 588

Context Persistence

Persist context data to Salesforce database entities.

[Persist Context \(POST\)](#)

Persist a context by passing the context ID.

Persist Context (POST)

Persist a context by passing the context ID.

Resource

```
/connect/contexts/persist-records
```

Example for POST

```
https://yourInstance.salesforce.com/services/data/v63.0/connect/contexts/persist-records
```

Available version

59.0

Requires Chatter

No

HTTP methods

POST

Request body for POST

JSON example

```
{
  "contextPersistInput": {
    "contextId": "384fdcef-36e2-4bbb-82ed-2e7bc4e670c7",
    "targetMappingId": "11jxx0000004Q83AAE"
  }
}
```

Properties


Name	Type	Description	Required or Optional	Available Version
contextPersistInput	Object	Contains contextId and targetMappingId for persisting context.	Required	59.0

JSON example

```
{
  "contextId": "384fdcef-36e2-4bbb-82ed-2e7bc4e670c7",
  "targetMappingId": "11jxx0000004Q83AAE"
}
```

Response body for POST

Persist Context Output

 **Note:** When updating reference fields within a context and attempting to persist the context, changes to the reference field itself may not be persisted. This is because reference fields point to related entities, and the persist operation primarily focuses on the attributes of the main entity within the context.

For example, if you have an Order context with a reference field to an Account, updating the Account reference within the Order context and then calling the persist API may not save the updated Account reference. Other attributes of the Order might be persisted, but the relationship to the Account might not be.

## Request Bodies

Here's a list of Context Service API request bodies.

### [Context Attribute Mappings Input](#)

Input representation of context attribute mapping.

### [Context Attribute Hydration Details Input](#)

Input representation of context attribute hydration detail.

### [Context Attributes Input](#)

Input representation of context attribute.

### [Context Definition Input](#)

Input representation of the context definition.

### [Context Input](#)

Input representation for defining a context.

### [Context Mappings Input](#)

Input representation of context mapping.

### [Context Metadata Input](#)

Input representation of context metadata.

### [Context Node ID Input](#)

Input representation of the list of context node IDs to create the relationship nodes for.

### [Context Node Mappings Input](#)

Input representation of context node mapping.

### [Context Nodes Input](#)

Input representation of context node.

### [Context Tag Input](#)

Input representation of the context tag.

### [Node Path and Tag Values Input](#)

Input representation of the node path which needs to update with tag details.

### [Query Context Record Input](#)

Input representation of query context record.

### [Query Record Status Input](#)

Input representation of status and related error messages of query data records.

### [Tag Values Input](#)

Input representation of the list of Tag Names to be updated and their values.

## Context Attribute Mappings Input

Input representation of context attribute mapping.

### JSON example

```
{
  "contextAttributeMappings": [
    {
```

```

        "contextAttributeId": "11nxx000001hIgLAAU",
        "hydrationDetails": {
            "contextAttrHydrationDetails": [
                {
                    "sObjectDomain": "Order",
                    "queryAttribute": "Status"
                }
            ]
        },
        {
            "contextAttributeId": "11nxx000001hKiFAAU",
            "hydrationDetails": {
                "contextAttrHydrationDetails": [
                    {
                        "sObjectDomain": "Order",
                        "queryAttribute": "Name"
                    }
                ]
            }
        }
    ]
}

```

This example shows a JSON sample when context-to-context mappings exist.

```

{
    "contextMappings": [
        {
            "contextMappingId": "11jxx0000005UXnAAM",
            "contextNodeMappings": {
                "contextNodeMappings": [
                    {
                        "attributeMappings": {
                            "contextAttributeMappings": [
                                {
                                    "hydrationDetails": {
                                        "contextAttrContextHydrationDetails": [
                                            {
                                                "queryAttribute": "11nxx000001hGTFAA2",
                                                "parentAttributeMappingId": "11Rxx00000058LcEAI"
                                            }
                                        ]
                                    },
                                    "contextAttributeId": "11nxx000001ihzFAAQ",
                                    "contextInputAttributeName": "Node1A1"
                                }
                            ]
                        },
                        "contextNodeId": "11oxx000001HS0iAAG",
                        "mappedContextNodeId": "11oxx000001G0mSAAS",
                        "sObjectName": "Node1"
                    }
                ]
            }
        }
    ],
    },
}

```

```

    "intents": [
      "ASSOCIATION",
      "HYDRATION",
      "PERSISTENCE",
      "TRANSLATION"
    ],
    "mappedContextDefinitionName": "110xx0000006PZ8EAM",
    "isDefault": false
  }
]
}

```

### Properties

Name	Type	Description	Required or Optional	Available Version
contextAttributeId	String	ID of the context attribute record.	Required	59.0
contextAttributeMappingId	String	ID of the context attribute mapping record.	Required	59.0
contextInputAttributeName	String	Context input attribute name.	Optional	59.0
hydrationDetails	<a href="#">Context Attribute Hydration Details Input[]</a>	List of context attribute hydration detail.	Optional	59.0

### Context Attribute Hydration Details Input

Input representation of context attribute hydration detail.

### Properties

Name	Type	Description	Required or Optional	Available Version
childDetails	<a href="#">Context Attribute Hydration Details Input[]</a>	Child of hydration details.	Required	59.0
contextAttributeDetailId	String	ID of the hydration detail record. This field is required for the update request.	Optional	59.0
parentAttributeMappingId	String	ID of the parent context attribute mapping record.	Required	59.0
parentDetailId	String	ID of the parent context attribute hydration detail record.	Required	59.0
queryAttribute	String	Query attribute.	Optional	59.0
sObjectDomain	String	SObject domain.	Optional	59.0

Context Attributes Input

Input representation of context attribute.

JSON example

```
{
  "contextAttributes": [
    {
      "dataType": "STRING",
      "fieldType": "INPUT",
      "name": "Attribute_5",
      "tags": {
        "contextTags": [
          {
            "name": "Attribute_5_Tag"
          }
        ]
      }
    },
    {
      "dataType": "NUMBER",
      "fieldType": "OUTPUT",
      "name": "Attribute_6"
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
contextAttributeId	String	ID of the attribute.	Required	59.0
dataType	String	Data type of the attribute.	Required	59.0
domainSet	String	Comma separated node names referenced by this attribute.	Optional	59.0
fieldType	String	Field type of the attribute.	Required	59.0
isKey	Boolean	Specifies if it used for transposable feature ( <code>true</code> ) or not ( <code>false</code> ).	Optional	59.0
isValue	Boolean	Specifies if it used for transposable feature ( <code>true</code> ) or not ( <code>false</code> ).	Optional	59.0
name	String	Name of the attribute.	Required	59.0
tags	<a href="#">Context Tag Input[]</a>	List of tags for the attribute.	Optional	59.0

Context Definition Input

Input representation of the context definition.

JSON example

```
{
  "name": "Example Definition",
  "description": "Example Description",
  "developerName": "John Doe",
  "startDate": "2023-06-02T00:00:00.000Z",
  "endDate": "2025-06-20T00:00:00.000Z",
  "isActive": false,

  "payload": {
    "contextDefinition": {
      "name": "ExampleDefinition",
      "description": "Example Description",
      "sourceDefinitionId": "110xx0000007MnhEAE",
      "contextTtl": 30
    }
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
contextTtl	Integer	Time to live (TTL) of context.	Optional	59.0
description	String	Short description of context definition.	Optional	59.0
developerName	String	Developer name.	Required	59.0
endDate	String	End date till context definition is valid.	Optional	59.0
isActive	Boolean	Specifies whether context is active ( <code>true</code> ) or not ( <code>false</code> ).	Optional	59.0
name	String	Name of the context definition.	Required	59.0
payload	String	JSON payload containing all the definitions and mappings.	Optional	59.0
sourceDefinitionId	String	Source context definition ID.	Optional	59.0
startDate	String	Start date from when context definition is valid.	Required	59.0

Context Input

Input representation for defining a context.

JSON example

```
{
  "metadata": {
    "contextDefinitionId": "110xx0000006VjNEAU",
    "mappingId": "11jxx0000004Q83AAE"
  }
}
```

```
    },
    "data":
    "{\\\"Order\\\": [{\\\"id\\\": \\\"TestOrder123\\\", \\\"businessObjectType\\\": \\\"Order\\\", \\\"Name\\\": \\\"Test
Order\\\", \\\"Status\\\": \\\"PENDING\\\", \\\"Account\\\": \\\"Key\\\", \\\"OrderItems\\\": [{\\\"ID\\\": \\\"B-Order1\\\", \\\"businessObjectType\\\": \\\"Data\\\", \\\"Parent\\\": \\\"Order\\\", \\\"ID\\\": \\\"B-Order2\\\", \\\"businessObjectType\\\": \\\"Data\\\", \\\"Parent\\\": \\\"Order\\\"}]}] }"
```

Properties

Name	Type	Description	Required or Optional	Available Version
data	String	Payload containing context-specific information.	Required	59.0
metadata	<a href="#">Context MetaData Input</a>	Metadata information about context.	Required	59.0

Context Mappings Input

Input representation of context mapping.

JSON example

```
{
  "contextMappings": [
    {
      "name": "ExampleMapping",
      "description": "Example Mapping Description",
      "isDefault": true,
      "intents": [
        "ASSOCIATION",
        "HYDRATION",
        "PERSISTENCE",
        "TRANSLATION"
      ]
    }
  ],
  "generateInputMappings": false,
  "generateSObjectMappings": false
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
contextMappingId	String	ID of this context mapping. Required for update.	Required	59.0
contextNodeMappings	<a href="#">Context Node Mappings Input[]</a>	List of context node mappings.	Optional	59.0
description	String	Description of context mapping.	Optional	59.0

Name	Type	Description	Required or Optional	Available Version
<code>isDefault</code>	Boolean	Indicates whether to make a default mapping for the context definition ( <code>true</code> ) or not ( <code>false</code> ).	Optional	59.0
<code>intents</code>	List<String>	Purpose that's used to identify the type of required context mapping. Valid values are: <ul style="list-style-type: none"> <li>• <code>HYDRATION</code>—To load cache from a data source.</li> <li>• <code>PERSISTENCE</code>—To load the sink objects from cache. Sink objects are the final destinations for the processed data.</li> <li>• <code>ASSOCIATION</code>—To create a mapping without validating database relationships, attaching context structure nodes and their attributes with data source nodes and their attributes.</li> <li>• <code>TRANSLATION</code>—To transform the data loaded in the cache to another representation defined by the mapping.</li> </ul>	Optional	61.0
<code>name</code>	String	Name of the context mapping.	Required	59.0

## Context Metadata Input

Input representation of context metadata.

### JSON example

```
{
  "metadata": {
    "contextDefinitionId": "110xx0000006VjNEAU",
    "mappingId": "11jxx0000004Q83AAE"
  }
}
```

### Properties

Name	Type	Description	Required or Optional	Available Version
<code>contextDefinitionId</code>	String	The ID of the context definition to use for validating and creating the context record.	Required	59.0

Name	Type	Description	Required or Optional	Available Version
mappingId	String	The ID of the context mapping to use for resolving the provided context data attributes.	Required	59.0
taggedData	Boolean	Parameter to return tagged attribute names instead of raw names in the created context record.	Optional	59.0

## Context Node ID Input

Input representation of the list of context node IDs to create the relationship nodes for.

### JSON example

```
{
  "contextNodeIds": [
    "110xx000001G3dtAAC",
    "110xx000001G3duAAC"
  ]
}
```

### Properties

Name	Type	Description	Required or Optional	Available Version
contextNodeIds	String	List of context node IDs to create the relationship nodes by adding them as child nodes to the context node that's specified in the endpoint.	Required	61.0

## Context Node Mappings Input

Input representation of context node mapping.

### JSON example

```
{
  "contextNodeMappings": [
    {
      "contextNodeId": "110xx000001G31BAAS",
      "sObjectName": "Order"
    },
    {
      "contextNodeId": "110xx000001G31CAAS",
      "sObjectName": "OrderItem"
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
attributeMappings	<a href="#">Context Attribute Mappings Input[]</a>	List of context attribute mappings.	Required	59.0
contextNodeId	String	Reference to context node.	Optional	59.0
contextNodeMappingId	String	ID of this context node mapping. Required for update.	Required	59.0
sObjectName	String	SObject name.	Optional	59.0

Context Nodes Input

Input representation of context node.

JSON example

```
{
  "contextNodes": [
    {
      "name": "Node_0",
      "attributes": {
        "contextAttributes": [
          {
            "dataType": "STRING",
            "fieldType": "INPUT",
            "name": "Attribute_1"
          }
        ]
      },
      "childNodes": {
        "contextNodes": [
          {
            "name": "Node_1",
            "attributes": {
              "contextAttributes": [
                {
                  "dataType": "NUMBER",
                  "fieldType": "INPUT",
                  "name": "Attribute_2"
                }
              ]
            }
          }
        ]
      }
    }
  ]
}
```

**Properties**

Name	Type	Description	Required or Optional	Available Version
attributes	<a href="#">Context Attributes Input []</a>	List of context attributes.	Optional	59.0
childNodes	<a href="#">Context Nodes Input []</a>	List of child context nodes.	Optional	59.0
contextNodeId	String	ID of the context node.	Required	59.0
isTransposable	Boolean	Specifies if the context node is used for the transposable feature ( <code>true</code> ) or not ( <code>false</code> ).	Optional	59.0
name	String	Name of the context node.	Required	59.0
parentNodeId	String	ID of (parent) context node.	Optional	59.0
tags	<a href="#">Context Tag Input []</a>	List of context tags.	Optional	59.0

**Context Tag Input**

Input representation of the context tag.

**JSON example**

```
{
  "contextTags": [
    {
      "name": "Attribute_Tag",
      "contextAttributeId": "11nxx000001hOozAAE"
    },
    {
      "name": "Node_Tag",
      "contextNodeId": "11oxx000001G9D2AAK"
    }
  ]
}
```

**Properties**

Name	Type	Description	Required or Optional	Available Version
contextAttributeId	String	ID of the (parent) context attribute.	Required	59.0
contextNodeId	String	ID of the (parent) context node.	Required	59.0
contextTagId	String	ID of this Context tag. Required only for update.	Optional	59.0
name	String	Name of the context tag.	Required	59.0

## Node Path and Tag Values Input

Input representation of the node path which needs to update with tag details.

### JSON example

```
{
  "nodePath": {
    "dataPath": [
      "001xx000003GbQSAA0"
    ]
  },
  "tagValues": [
    {
      "tagName": "Name",
      "tagValue": "updatedAccount"
    },
    {
      "tagName": "City",
      "tagValue": "Bangalore"
    }
  ]
}
```

### Properties

Name	Type	Description	Required or Optional	Available Version
nodePath	String	Path of Context Data Record.	Required	63.0
tagValues	<a href="#">List&lt;Context TagValueInput Representation</a> on page 568	List of Tag Names to be updated and their values.	Required	63.0

## Query Context Record Input

Input representation of query context record.

### JSON example

```
{
  "contextId": "7bc695bc-f38b-4a94-8a95-0caa50f3da53"
}
```

### Properties

Name	Type	Description	Required or Optional	Available Version
attributes	String[]	List of attributes to be retrieved.	Optional	58.0
businessObjectTypeFilter	String	Filter based on a business object type.	Optional	58.0
contextId	String	The ID of the context to be queried.	Required	58.0

Name	Type	Description	Required or Optional	Available Version
queryPath	String[]	Path to the parent node.	Optional	58.0

## Query Record Status Input

Input representation of status and related error messages of query data records.

### JSON example

```
{
  "queryRecordStatusInput": {
    "contextId": "3729ed60-d16d-41b8-8951-9ad4f6407ad2",
    "queryPaths": [
      {
        "dataPath": [
          "TestOrder123"
        ]
      }
    ]
  }
}
```

### Properties

Name	Type	Description	Required or Optional	Available Version
queryRecordStatusInput	Object	Input representation for context ID and the list of paths for querying the status.	Required	59.0

## Tag Values Input

Input representation of the list of Tag Names to be updated and their values.

### JSON example

```
{
  "tagName": "Name",
  "tagValue": "updatedAccount"
},
{
  "tagName": "City",
  "tagValue": "Bangalore"
}
```

## Properties

Name	Type	Description	Required or Optional	Available Version
tagName	String	Name of tag thats need to be updated.	Required	63.0
tagValue	String	Updated value of tags.	Required	63.0

## Response Bodies

Here's a list of Context Service response bodies.

### [Context Attribute Output](#)

Output representation of the context attribute.

### [Context Attribute Mapping](#)

Output representation of the context attribute mapping.

### [Context Attribute Mapping List](#)

Output representation of list of context attribute mappings.

### [Context Attribute Hydration Detail](#)

Output representation of context attribute hydration detail.

### [Context Attribute Tag Output](#)

Output representation of context attribute tag.

### [Context Attribute List Output](#)

Output representation of list of context attributes.

### [Context Data Record](#)

Output representation of context data record, including its attributes, type, associated child objects, and other relevant metadata.

### [Context Data Record Status](#)

Output representation of context data record status.

### [Context Definition Information](#)

Output representation of context definition information.

### [Context Definition Interface](#)

Output representation of the details of the context definition interface.

### [Context Definition Interface Attribute Tag](#)

Output representation of the attribute tags associated with the context definition interface.

### [Context Definition Interface Metadata](#)

Output representation of the metadata associated with the context definition interface.

### [Context Definition Interface Metadata List](#)

Output representation of the metadata list associated with the context definition interfaces.

### [Context Definition Interface Node Tag](#)

Output representation of the tags associated with the context definition interface.

[Context Definition Output](#)

Output representation of context definition.

[Context Definition List](#)

Output representation of list of context definitions.

[Context Definition Version](#)

Output representation of context definition version.

[Context Definition Reference](#)

Output representation of context definition reference.

[Context Error Response](#)

Output representation of context error.

[Context Information](#)

Output representation containing detailed information about a context.

[Context Mapping Output](#)

Output representation of context mapping.

[Context Mapping List Output](#)

Output representation of a list of context mappings.

[Context Node Mapping Output](#)

Output representation of the context node mapping.

[Context Node Mapping List Output](#)

Output representation of list of context node mappings.

[Context Node List](#)

Output representation of the list of context nodes.

[Context Node](#)

Output representation of the details of context nodes.

[Context Output](#)

Output Representation of attributes associated with defined context.

[Context Query Record](#)

Output representation of context query record, including primary and associated child records.

[Context Tag Data](#)

Output representation of context tag data.

[Context Tag List Output](#)

Output representation of list of context tags.

[Mapped Attribute Data Type](#)

Output representation of the context attribute mapping data type information.

[Persist Context Output](#)

Output Representation to persist context data.

[Query Context Record Result](#)

Output representation of query result context record.

[Query Record Status Result](#)

Output representation of query result status of context data records.

[Query Tags](#)

Output representation of query tags result.

[Query Tags Result](#)

Output representation of the results when querying context tags.

## Context Attribute Output

Output representation of the context attribute.

Property Name	Type	Description	Filter Group and Version	Available Version
attributeTags	<a href="#">Context Attribute Tag</a> on page 573[]	List of context attribute tags.	Small, 59.0	59.0
contextAttributeId	String	ID of this context attribute.	Small, 59.0	59.0
dataType	String	Data type of the context attribute.	Small, 59.0	59.0
domainSet	String	Comma separated node names referenced by this attribute.	Small, 59.0	59.0
fieldType	String	Field type of the attribute.	Small, 59.0	59.0
isKey	Boolean	Specifies if it used for transposable feature ( <code>true</code> ) or not ( <code>false</code> ).	Small, 59.0	59.0
isSuccess	Boolean	Specifies if the operation is success ( <code>true</code> ) or not ( <code>false</code> ).	Small, 59.0	59.0
isValue	Boolean	Specifies if it used for transposable ( <code>true</code> ) or not ( <code>false</code> ).	Small, 59.0	59.0
name	String	Name of the attribute.	Small, 59.0	59.0
parentNodeId	String	ID of (parent) context node.	Small, 59.0	59.0

## Context Attribute Mapping

Output representation of the context attribute mapping.

Property Name	Type	Description	Filter Group and Version	Available Version
contextAttr ContextHydration DetailList	Context Attribute Context Hydration Detail[]	List of the context attribute hydration records when context-to-context mappings exist.	Small, 61.0	61.0
context AttrHydration DetailList	<a href="#">Context Attribute Hydration Detail</a> []	Details of the context attribute hydration.	Small, 59.0	59.0
context AttributeId	String	ID of the context attribute record.	Small, 59.0	59.0

Property Name	Type	Description	Filter Group and Version	Available Version
contextAttributeMappingId	String	ID of the context attribute mapping record.	Small, 59.0	59.0
contextInputAttributeName	String	Input attribute name.	Small, 59.0	59.0
isSuccess	Boolean	Indicates whether the operation is successful ( <code>true</code> ) or not ( <code>false</code> ).	Small, 59.0	59.0
parentNodeMappingId	String	ID of the parent context node mapping record.	Small, 59.0	59.0

### Context Attribute Mapping List

Output representation of list of context attribute mappings.

Property Name	Type	Description	Filter Group and Version	Available Version
contextAttributeMappingId	String	Unique ID. Required for LDS.	Small, 59.0	59.0
contextAttributeMappings	<a href="#">Context Attribute Mapping[]</a>	List of context attribute mappings.	Small, 59.0	59.0
isSuccess	Boolean	Indicates whether the request is successful ( <code>true</code> ) or not ( <code>false</code> ).	Small, 59.0	59.0

### Context Attribute Hydration Detail

Output representation of context attribute hydration detail.

Property Name	Type	Description	Filter Group and Version	Available Version
childDetails	<a href="#">Context Attribute Hydration Detail[]</a>	List of parent context attribute hydration detail.	Small, 59.0	59.0
contextAttributeMappingId	String	ID of this context attribute hydration detail record.	Small, 59.0	59.0
isSuccess	Boolean	Indicates whether the operation is successful ( <code>true</code> ) or not ( <code>false</code> ).	Small, 59.0	59.0
mappedAttributeDataTypeInfo	<a href="#">Mapped Attribute Data Type[]</a>	Data type of the attribute mapped field.	Small, 59.0	59.0
parentNodeMappingId	String	ID of the parent context attribute mapping record.	Small, 59.0	59.0
queryAttribute	String	Query attribute.	Small, 59.0	59.0

Property Name	Type	Description	Filter Group and Version	Available Version
sObjectDomain	String	sObject domain.	Small, 59.0	59.0

## Context Attribute Tag Output

Output representation of context attribute tag.

Property Name	Type	Description	Filter Group and Version	Available Version
contextAttributeId	String	ID of (parent) context attribute.	Small, 59.0	59.0
contextTagId	String	ID of this context tag.	Small, 59.0	59.0
dynamic	Boolean	Indicates if the attribute tag is dynamic ( <div>true</div> ) or not ( <div>false</div> ).	Small, 59.0	59.0
name	String	Name of the context attribute tag.	Small, 59.0	59.0

## Context Attribute List Output

Output representation of list of context attributes.

Property Name	Type	Description	Filter Group and Version	Available Version
attributes	<a href="#">Context Attribute Output[]</a>	List of attributes.	Small, 59.0	59.0
contextAttributeListId	String	Unique ID. Required for LDS	Small, 59.0	59.0
contextNodeId	String	ID of context node.	Small, 59.0	59.0
isSuccess	Boolean	Success	Small, 59.0	59.0

## Context Data Record

Output representation of context data record, including its attributes, type, associated child objects, and other relevant metadata.

### Sample Response

```
{
  "childQueryRecords": [
    {
```

```

        "childQueryRecords": [],
        "record": {
            "attributesAndValues": {
                "Name": "Acme Corp",
                "BillingAddress": "{city:New
York, country:USA, geocodeAccuracy:null, latitude:null, longitude:null, postalCode:31349, state:NY, street:10
Main Rd.}",
                "Industry": "Manufacturing",
                "Type": "Prospect"
            },
            "businessObjectType": "Account",
            "childBusinessObjectTypes": [
                "OpportunityItem",
                "OrderItem"
            ],
            "contextDataRecordId": "003xx000004WhFsAAK",
            "currentState": "CREATED",
            "lastUpdatedTimeStamp": "2023-10-11 04:46:13.804"
        }
    ]
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
attributesAndValues	Map<String, Object>	Mapping of attributes to their corresponding values within the context.	Small, 59.0	59.0
businessObjectType	String	Type of business object.	Small, 59.0	59.0
childBusinessObjectTypes	String[]	List indicating types of child business objects.	Small, 59.0	59.0
contextDataRecordId	String	Unique ID of the context data record.	Small, 59.0	59.0
currentState	String	The current status of the context data record.	Small, 59.0	59.0
lastUpdatedTimeStamp	String	The last updated time stamp of context data record.	Small, 59.0	59.0

## Context Data Record Status

Output representation of context data record status.

Property Name	Type	Description	Filter Group and Version	Available Version
contextErrors	<a href="#">Context Error</a> on page 583[]	List of context errors.	Small, 59.0	59.0

Property Name	Type	Description	Filter Group and Version	Available Version
dataPath	String[]	Path of the data.	Small, 59.0	59.0
processingStatus	String	Processing status of the context data record.	Small, 59.0	59.0

Context Definition Information

Output representation of context definition information.

Sample Response

```
{
  "activeVersionId": "11pxx0000004cLEAAY",
  "contextDefinitionId": "11Oxx0000006XWfEAM",
  "contextTtl": 30,
  "createdBy": "Admin User",
  "createdDate": "2024-10-17T14:34:26.000Z",
  "definition": "ExampleDefinition",
  "description": "Example Description",
  "developerName": "ExampleDevelopername",
  "isActive": false,
  "isEditable": true,
  "isSuccess": true,
  "lastModifiedBy": "Admin User",
  "lastModifiedDate": "2024-10-17T14:34:26.000Z",
  "startDate": "2024-10-17T14:34:26.000Z"
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
activeVersionId	String	Active context definition version ID.	Small, 59.0	59.0
contextDefinitionId	String	ID of the context definition.	Small, 59.0	59.0
contextTtl	Integer	TTL of the context.	Small, 59.0	59.0
createdBy	String	User who created the context definition.	Small, 59.0	59.0
createdDate	String	Date on which the context definition was created.	Small, 59.0	59.0
definition	String	Name of the context definition.	Small, 59.0	59.0
description	String	Short description of context definition.	Small, 59.0	59.0
developerName	String	Developer name associated with the definition.	Small, 59.0	59.0
isActive	Boolean	Specifies if the context definition list is active ( <code>true</code> ) or not ( <code>false</code> ).	Small, 59.0	59.0
isEditable	Boolean	Specifies if the context definition list is editable ( <code>true</code> ) or not ( <code>false</code> ).	Small, 59.0	59.0

Property Name	Type	Description	Filter Group and Version	Available Version
isSuccess	Boolean	Specifies if the operation is success ( <code>true</code> ) or not ( <code>false</code> ).	Small, 59.0	59.0
lastModifiedBy	String	User who last modified the definition.	Small, 59.0	59.0
lastModifiedDate	String	Date on which the definition was modified last.	Small, 59.0	59.0
startDate	String	Start date from when context definition is valid.	Small, 59.0	59.0

## Context Definition Interface

Output representation of the details of the context definition interface.

### JSON example

```
{
  "contextDefinitionInterfaceMetadata": {
    "createdBy": "Automated Process",
    "createdDate": "2024-05-15T00:00:00.000Z",
    "description": "Test Interface",
    "developerName": "TestBaseInterface",
    "interfaceName": "TestBaseInterface",
    "lastModifiedBy": "Automated Process",
    "parentInterfaces": [
      "TestBaseInterface1"
    ],
    "version": "62.1"
  },
  "contextDefinitionInterfaceNodeTagList": [
    {
      "attributeTags": [
        {
          "dataType": "STRING",
          "isMappingRequired": true,
          "isNodeTag": false,
          "tagName": "id_attr_tag"
        }
      ],
      "childNodesTags": [
        {
          "attributeTags": [
            {
              "dataType": "STRING",
              "isMappingRequired": false,
              "isNodeTag": false,
              "tagName": "contactId_attr_tag"
            },
            {
              "dataType": "STRING",
              "isMappingRequired": true,
```

```

        "isNodeTag": false,
        "tagName": "contactName_attr_tag"
    }
],
"childNodesTags": [],
"isMappingRequired": false,
"isNodeTag": true,
"tagName": "Contact_node_tag"
}
],
"isMappingRequired": true,
"isNodeTag": true,
"tagName": "Account_node_tag"
}
],
"isSuccess": true
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
contextDefinitionInterfaceMetadata	<a href="#">Context Definition Interface Metadata</a>	Metadata details associated with the context definition interface.	Small, 62.0	62.0
contextDefinitionInterfaceNodeTagList	<a href="#">Context Definition Interface Node Tag[]</a>	List of tags associated with the context definition interface.	Small, 62.0	62.0
isSuccess	Boolean	Indicates whether the operation is successful (true) or not (false).	Small, 62.0	62.0

## Context Definition Interface Attribute Tag

Output representation of the attribute tags associated with the context definition interface.

### JSON example

```

{
  "attributeTags": [
    {
      "dataType": "REFERENCE",
      "isMappingRequired": false,
      "isNodeTag": false,
      "domainName": "Account",
      "tagName": "AccountRef_attr_tag"
    }
  ]
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
dataType	String	Data type of the attribute associated with the context definition interface.	Small, 62.0	62.0

Property Name	Type	Description	Filter Group and Version	Available Version
domainName	String	Domain name of the attribute associated with the context definition interface.	Small, 62.0	62.0
isMappingRequired	Boolean	Indicates whether the attribute tag must be mapped in the context definition ( <code>true</code> ) or not ( <code>false</code> ).	Small, 62.0	62.0
isNodeTag	Boolean	Indicates whether the attribute tag is a node tag ( <code>true</code> ) or not ( <code>false</code> ).	Small, 62.0	62.0
isOptional	Boolean	Indicates whether validation must be done for the attribute tag ( <code>true</code> ) or not ( <code>false</code> ).	Small, 62.0	62.0
isSuccess	Boolean	Indicates whether the operation is successful ( <code>true</code> ) or not ( <code>false</code> ).	Small, 62.0	62.0
tagName	String	Name of the attribute tag.	Small, 62.0	62.0

Context Definition Interface Metadata

Output representation of the metadata associated with the context definition interface.

JSON example

```
{
  "contextDefinitionInterfaceMetadata": {
    "createdBy": "Automated Process",
    "createdDate": "2024-05-15T00:00:00.000Z",
    "description": "Test Interface",
    "developerName": "TestBaseInterface",
    "interfaceName": "TestBaseInterface",
    "lastModifiedBy": "Automated Process",
    "parentInterfaces": [
      "TestBaseInterface1"
    ],
    "version": "62.1"
  }
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
createdBy	String	User, system, or object that created the context definition interface.	Small, 62.0	62.0
createdDate	String	Date when the context definition interface was created.	Small, 62.0	62.0
description	String	Description of the context definition interface.	Small, 62.0	62.0

Property Name	Type	Description	Filter Group and Version	Available Version
developerName	String	Developer name of the context definition interface.	Small, 62.0	62.0
interfaceName	String	Title of the context definition interface.	Small, 62.0	62.0
lastModifiedBy	String	User, system, or object that last updated the context definition interface.	Small, 62.0	62.0
parentInterfaces	String[]	List of parent context definition interfaces that this interface is inherited from.	Small, 62.0	62.0
version	String	Version number of the context definition interface.	Small, 62.0	62.0

Context Definition Interface Metadata List

Output representation of the metadata list associated with the context definition interfaces.

JSON example

```
{
  "contextDefinitionInterfaceMetadataList": [
    {
      "createdBy": "Automated Process",
      "createdDate": "2024-05-15T00:00:00.000Z",
      "description": "Test Interface",
      "developerName": "TestBaseInterface",
      "interfaceName": "TestBaseInterface",
      "lastModifiedBy": "Automated Process",
      "parentInterfaces": [
        "TestBaseInterface1"
      ],
      "version": "62.1"
    }
  ],
  "contextDefinitionInterfaceMetadataListId": "43db7f18-9dd7-40a2-9a34-a2b3a1cff9e5",
  "isSuccess": true
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
contextDefinitionInterfaceMetadataList	<a href="#">Context Definition Interface Metadata</a> []	List of metadata associated with the context definition interfaces.	Small, 62.0	62.0
contextDefinitionInterfaceMetadataListId	String	Unique ID of the metadata list associated with the context definition interfaces. Required for Lightning Data Service (LDS).	Small, 62.0	62.0

Property Name	Type	Description	Filter Group and Version	Available Version
isSuccess	Boolean	Indicates whether the operation is successful ( <code>true</code> ) or not ( <code>false</code> ).	Small, 62.0	62.0

## Context Definition Interface Node Tag

Output representation of the tags associated with the context definition interface.

### JSON example

```
{
  "contextDefinitionInterfaceNodeTagList": [
    {
      "attributeTags": [
        {
          "dataType": "STRING",
          "isMappingRequired": true,
          "isNodeTag": false,
          "tagName": "id_attr_tag"
        }
      ],
      "childNodesTags": [
        {
          "attributeTags": [
            {
              "dataType": "STRING",
              "isMappingRequired": false,
              "isNodeTag": false,
              "tagName": "contactId_attr_tag"
            },
            {
              "dataType": "STRING",
              "isMappingRequired": true,
              "isNodeTag": false,
              "tagName": "contactName_attr_tag"
            }
          ],
          "childNodesTags": [],
          "isMappingRequired": false,
          "isNodeTag": true,
          "tagName": "Contact_node_tag"
        }
      ],
      "isMappingRequired": true,
      "isNodeTag": true,
      "tagName": "Account_node_tag"
    }
  ]
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
attributeTags	<a href="#">Context Definition Interface Attribute Tag[]</a>	List of attribute tags associated with the context definition interface.	Small, 62.0	62.0
childNodesTags	<a href="#">Context Definition Interface Node Tag[]</a>	List of child node tags associated with the context definition interface.	Small, 62.0	62.0
isMappingRequired	Boolean	Indicates whether the context tags must be mapped in the context definition ( <code>true</code> ) or not ( <code>false</code> ).	Small, 62.0	62.0
isNodeTag	Boolean	Indicates whether the context tag is a node tag ( <code>true</code> ) or not ( <code>false</code> ).	Small, 62.0	62.0
isOptional	Boolean	Indicates whether validation must be done for the context tag ( <code>true</code> ) or not ( <code>false</code> ).	Small, 62.0	62.0
tagName	String	Name of the context tag.	Small, 62.0	62.0

## Context Definition Output

Output representation of context definition.

Property Name	Type	Description	Filter Group and Version	Available Version
activeVersionId	String	ID of the active context definition version.	Small, 59.0	59.0
canBeReferenceDefinition	Boolean	Specifies if the context definition can be used as a reference definition to other context definitions ( <code>true</code> ) or not ( <code>false</code> ).	Small, 63.0	63.0
contextDefinitionId	String	ID of the context definition.	Small, 59.0	59.0
contextDefinitionVersionList	<a href="#">Context Definition Version[]</a>	List of context definition versions.	Small, 59.0	59.0
contextTtl	Integer	TTL of the context.	Small, 59.0	59.0
definition	String	Definition.	Small, 59.0	59.0
definitionType	String	Type of definition. Possible values are: <ul style="list-style-type: none"> <li><code>standard_executable</code></li> <li><code>standard_nonexecutable</code></li> <li><code>custom_nonexecutable</code></li> </ul>	Small, 60.0	60.0
developerName	String	Developer name.	Small, 59.0	59.0
hasSystemTags	String	Specifies if the context definition has system node and tags attached ( <code>true</code> ) or not ( <code>false</code> ).	Small, 63.0	63.0

Property Name	Type	Description	Filter Group and Version	Available Version
interfaces	String	List of implemented Context Definition Interfaces for this context definition.	Small, 62.0	62.0
isActive	Boolean	Specifies if the context definition is active ( <code>true</code> ) or not ( <code>false</code> ).	Small, 59.0	59.0
isEditable	Boolean	Specifies if the context definition is editable ( <code>true</code> ) or not ( <code>false</code> ).	Small, 59.0	59.0
isSuccess	Boolean	Specifies if the operation is success ( <code>true</code> ) or not ( <code>false</code> ).	Small, 59.0	59.0
<del>referenceContextDefinitions</del> ContextDefinitionReference[] on page 583		List of reference definitions this definition is referencing .	Small, 63.0	63.0

## Context Definition List

Output representation of list of context definitions.

Property Name	Type	Description	Filter Group and Version	Available Version
contextDefinitionList	Context Definition Information[]	List of context definitions.	Small, 59.0	59.0
contextDefinitionListId	String	Unique ID. Required for LDS.	Small, 59.0	59.0
isSuccess	Boolean	Specifies if the output is success ( <code>true</code> ) or not ( <code>false</code> ).	Small, 59.0	59.0

## Context Definition Version

Output representation of context definition version.

Property Name	Type	Description	Filter Group and Version	Available Version
contextDefinitionId	String	ID of context definition.	Small, 59.0	59.0
contextDefinitionVersionId	String	ID of context definition version.	Small, 59.0	59.0
contextMappings	Context Mapping[] on page 584	List of context mappings.	Small, 59.0	59.0
contextNodes	Context Node[] on page 587	List of context nodes.	Small, 59.0	59.0
endDate	String	End date till context definition version is valid.	Small, 59.0	59.0

Property Name	Type	Description	Filter Group and Version	Available Version
isActive	Boolean	Specifies if the context definition version is active ( <code>true</code> ) or not ( <code>false</code> ).	Small, 59.0	59.0
isEditable	Boolean	Specifies if the context definition version is editable ( <code>true</code> ) or not ( <code>false</code> ).	Small, 59.0	59.0
isSuccess	Boolean	Specifies if the operation is success ( <code>true</code> ) or not ( <code>false</code> ).	Small, 59.0	59.0
startDate	String	Start date from when context definition version is valid.	Small, 59.0	59.0
versionNumber	Integer	Version number.	Small, 59.0	59.0

## Context Definition Reference

Output representation of context definition reference.

Property Name	Type	Description	Filter Group and Version	Available Version
contextDefinitionReferenceId	String	ID of the ContextDefinitionReference.	Small, 63.0	63.0
referenceContextDefinition	String	ID of the reference context definition.	Small, 63.0	63.0
inheritedFrom	String	Represents inherited reference definition in the definition.	Small, 63.0	63.0
contextDefinition	String	ID or name of the current context definition.	Small, 63.0	63.0
referenceContextDefinitionName	String	Reference context definition name.	Small, 63.0	63.0

## Context Error Response

Output representation of context error.

Property Name	Type	Description	Filter Group and Version	Available Version
errorCode	String	Error code for the context error.	Small, 59.0	59.0
errorMessage	String	Error message for the context error.	Small, 59.0	59.0

## Context Information

Output representation containing detailed information about a context.

### Sample Response

```
{
  "childBusinessObjectTypes": [
```

```

    "Order"
  ],
  "contextDefinitionId": "110xx0000006VjNEAU",
  "contextId": "3729ed60-d16d-41b8-8951-9ad4f6407ad2",
  "contextMappingId": "11jxx0000004Q83AAE",
  "isSuccess": true
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
<del>childBusinessObjectTypes</del>	String[]	List of associated child business object types.	Small, 59.0	59.0
contextDefinitionId	String	ID of the context definition record.	Small, 59.0	59.0
contextId	String	Unique ID of the context.	Small, 59.0	59.0
contextMappingId	String	Identifier for the context's mapping structure.	Small, 59.0	59.0
isSuccess	Boolean	Indicates whether the request was successful ( <code>true</code> ) or not ( <code>false</code> ).	Small, 59.0	59.0

## Context Mapping Output

Output representation of context mapping.

Property Name	Type	Description	Filter Group and Version	Available Version
<del>contextDefinitionID</del>	String	ID of the context definition version.	Small, 59.0	59.0
contextMappingID	String	ID of the context mapping.	Small, 59.0	59.0
<del>contextNodeMappings</del>	<a href="#">Context Node Mapping</a> []	List of context node mappings.	Small, 59.0	59.0
description	String	Description of context mapping.	Small, 59.0	59.0
isDefault	Boolean	Specifies if you want to make it the default mapping for context definition ( <code>true</code> ) or not ( <code>false</code> ).	Small, 59.0	59.0
isInputMapped	Boolean	Indicates whether the specified context mapping details are mapped with the source ( <code>true</code> ) or not ( <code>false</code> ).	Small, 61.0	61.0
isSuccess	Boolean	Indicates whether the operation is successful ( <code>true</code> ) or not ( <code>false</code> ).	Small, 59.0	59.0
intents	List<String>	Context mapping that's associated with the usage of the <code>intents</code> .	Small, 61.0	61.0

Property Name	Type	Description	Filter Group and Version	Available Version
mappedContextDefinitionName	String	API name of the context definition when context-to-context mappings exist.	Small, 61.0	61.0
name	String	Name of the context mapping.	Small, 59.0	59.0

## Context Mapping List Output

Output representation of a list of context mappings.

### Sample Response

```
{
  "contextMappingListId": "915c3ffc-65e6-47fd-b9c1-3fdfa92421c1",
  "contextMappings": [
    {
      "contextDefinitionVersionId": "11pxx0000004UcCAAU",
      "contextMappingId": "11jxx0000004LYBAA2",
      "contextNodeMappings": [],
      "description": "mappingDescription",
      "intents": [
        "ASSOCIATION",
        "HYDRATION",
        "PERSISTENCE",
        "TRANSLATION"
      ],
      "isDefault": false,
      "isInputMapped": false,
      "name": "mappingName"
    }
  ],
  "isSuccess": true
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
contextMappingListId	String	Unique ID of the context mapping list.	Small, 59.0	59.0
contextMappings	<a href="#">Context Mapping Output[]</a>	List of context mappings.	Small, 59.0	59.0
isSuccess	Boolean	Indicates whether the operation is successful ( <code>true</code> ) or not ( <code>false</code> ).	Small, 59.0	59.0

## Context Node Mapping Output

Output representation of the context node mapping.

Property Name	Type	Description	Filter Group and Version	Available Version
attributeMappings	<a href="#">Context Attribute Mapping</a> []	List of the context attribute mappings.	Small, 59.0	59.0
contextMappingID	String	ID of the context mapping.	Small, 59.0	59.0
contextNodeID	String	ID of the context node.	Small, 59.0	59.0
contextNodeMappingID	String	ID of this context node mapping.	Small, 59.0	59.0
isSuccess	Boolean	Specifies if the operation is successful ( <code>true</code> ) or not ( <code>false</code> ).	Small, 59.0	59.0
mappedContext NodeId	String	Node ID in the source context definition.	Small, 61.0	61.0
sObjectName	String	SObject name.	Small, 59.0	59.0

## Context Node Mapping List Output

Output representation of list of context node mappings.

Property Name	Type	Description	Filter Group and Version	Available Version
contextNodeMappingListId	String	Unique ID. Required for LDS.	Small, 59.0	59.0
contextNodeMappings	<a href="#">Context Node Mapping Output</a> []	List of context node mappings	Small, 59.0	59.0
isSuccess	Boolean	Specifies if the operation is success ( <code>true</code> ) or not ( <code>false</code> ).	Small, 59.0	59.0

## Context Node List

Output representation of the list of context nodes.

### JSON Example

```
{
  "contextNodeListId": "ebaf2554-88f2-4cb2-8418-cd3c250a9535",
  "contextNodes": [
    {
      "attributes": [
        {
          "attributeTags": [],
          "contextAttributeId": "11nxx000001hJm5AAE",
          "dataType": "REFERENCE",
          "domainSet": "Contact_AccountSibRef",
          "fieldType": "INPUT",
          "isKey": false,
          "isValue": false,
          "name": "ParentReference",

```

```

        "parentNodeId": "110xx000001G3xEAAS"
      }
    ],
    "canonicalNodeId": "110xx000001G1CGAA0",
    "childNodes": [],
    "contextDefinitionVersionId": "11pxx0000004UvYAAU",
    "contextNodeId": "110xx000001G3xEAAS",
    "displayName": "Mobile_Contact_AccountSibRef",
    "isTransposable": false,
    "name": "Mobile_Contact_AccountSibRef",
    "parentNodeId": "110xx000001G1AeAAK",
    "tags": []
  }
],
"isSuccess": true
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
contextNode ListId	String	Unique ID of the context node list, which is required for Salesforce Lightning Design System (LDS).	Small, 59.0	59.0
contextNodes	<a href="#">Context Node []</a>	List of context nodes.	Small, 59.0	59.0
isSuccess	Boolean	Indicates whether the operation is successful (true) or not (false).	Small, 59.0	59.0

## Context Node

Output representation of the details of context nodes.

### JSON Example

```

{
  "contextNodes": [
    {
      "attributes": [],
      "baseReference": "110xx000001G1DTPP88",
      "canonicalNodeId": "110xx000001G1CGAA0",
      "childNodes": [],
      "contextDefinitionVersionId": "11pxx0000004UvYAAU",
      "contextNodeId": "110xx000001G3xEAAS",
      "displayName": "Mobile_Contact_AccountSibRef",
      "isSuccess": true,
      "isTransposable": false,
      "name": "Mobile_Contact_AccountSibRef",
      "parentNodeId": "110xx000001G1AeAAK",
      "tags": []
    }
  ]
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
attributes	<a href="#">Context Attribute List[]</a>	List of attributes.	Small, 59.0	59.0
baseReference	String	Identifies the context node ID of the parent context definition that this context node is inherited from.	Small, 60.0	60.0
canonicalNodeId	String	ID of the canonical node that's used as a reference to create this context node.	Small, 61.0	61.0
childNodes	<a href="#">Context Node Output[]</a>	List of child context nodes.	Small, 59.0	59.0
contextDefinitionVersionID	String	ID of context definition version.	Small, 59.0	59.0
contextNodeID	String	ID of this context node.	Small, 59.0	59.0
displayName	String	Name of the context node that appears on the UI.	Small, 61.0	61.0
isSuccess	Boolean	Specifies if the operation is successful ( <code>true</code> ) or not ( <code>false</code> ).	Small, 59.0	59.0
isTransposable	Boolean	Specifies if the context node is used for the transposable feature ( <code>true</code> ) or not ( <code>false</code> ).	Small, 59.0	59.0
name	String	Name of the context node.	Small, 59.0	59.0
parentNodeId	String	ID of (parent) context node.	Small, 59.0	59.0
tags	<a href="#">Context Attribute Tag Output[]</a>	List of tags.	Small, 59.0	59.0

## Context Output

Output Representation of attributes associated with defined context.

Property Name	Type	Description	Filter Group and Version	Available Version
isSuccess	Boolean	Indicates whether the attributes update is successful ( <code>true</code> ) or not ( <code>false</code> ).	Small, 59.0	59.0

## Context Query Record

Output representation of context query record, including primary and associated child records.

**Sample Response**

```
{
  "childQueryRecords": [
    {
      "childQueryRecords": [
        ],
      "record": {
        "attributesAndValues": {
          "Name": "Acme Corp",
          "BillingAddress": "{city:New
York, country:USA, geocodeAccuracy:null, latitude:null, longitude:null, postalCode:31349, state:NY, street:10
Main Rd.}",
          "Industry": "Manufacturing",
          "Type": "Prospect"
        },
        "businessObjectType": "Account",
        "childBusinessObjectTypes": [
          "OpportunityItem",
          "OrderItem"
        ],
        "contextDataRecordId": "003xx000004WhFsAAK",
        "currentState": "CREATED",
        "lastUpdatedTimeStamp": "2023-10-11 04:46:13.804"
      }
    }
  ]
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
childQueryRecords	<a href="#">Context Query Record</a>	List of child query records derived from the main context query.	Small, 59.0	59.0
record	<a href="#">Context Data Record</a>	The context data record obtained from the query.	Small, 59.0	59.0

**Context Tag Data**

Output representation of context tag data.

Property Name	Type	Description	Filter Group and Version	Available Version
dataPath	String[]	The path in the context data structure to the tag's location.	Small, 59.0	59.0
tagValue	<a href="#">Object</a> on page 592	The value of the tag, which can be nested if the tag corresponds to an object with multiple attributes.	Small, 59.0	59.0

## Context Tag List Output

Output representation of list of context tags.

Property Name	Type	Description	Filter Group and Version	Available Version
contextDefinitionId	String	ID of the context definition created.	Small, 59.0	59.0
contextTagListId	String	Unique ID. Required for LDS.	Small, 59.0	59.0
contextTags	<a href="#">Context Attribute Tag Output[]</a>	List of context tags.	Small, 59.0	59.0

## Mapped Attribute Data Type

Output representation of the context attribute mapping data type information.

Property Name	Type	Description	Filter Group and Version	Available Version
dataType	String	Data type of attribute mapped field.	Small, 59.0	59.0
supportedPicklistValues	String[]	Supported picklist values of attribute mapped field.	Small, 59.0	59.0

## Persist Context Output

Output Representation to persist context data.

### Sample Response

```
{
  "referenceId": "95Txx0000004CCG"
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
referenceId	String	The reference ID that maps to the response.	Small, 58.0	58.0

## Query Context Record Result

Output representation of query result context record.

### Sample Response

```
{
  "contextId": "7bc695bc-f38b-4a94-8a95-0caa50f3da53",
  "isDone": true,
  "isSuccess": true,
  "queryRecords": [
    {
      "childQueryRecords": [
```

```
    ],
    "record": {
      "attributesAndValues": {
        "Name": "Acme Corp",
        "BillingAddress": "{city:New York, country:USA, geocodeAccuracy:null, latitude:null, longitude:null, postalCode:31349, state:NY, street:10 Main Rd.}",
        "Industry": "Manufacturing",
        "Type": "Prospect"
      },
      "businessObjectType": "Account",
      "childBusinessObjectTypes": [
        "OpportunityItem",
        "OrderItem"
      ],
      "contextDataRecordId": "003xx000004WhFsAAK",
      "currentState": "CREATED",
      "lastUpdatedTimeStamp": "2023-10-11 04:46:13.804"
    }
  ]
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
contextId	String	ID for the context record that is queried.	Small, 59.0	59.0
isDone	Boolean	Indicates whether the query operation is complete ( <code>true</code> ) or not ( <code>false</code> ).	Small, 59.0	59.0
isSuccess	Boolean	Indicates whether the status of query is successful ( <code>true</code> ) or not ( <code>false</code> ).	Small, 59.0	59.0
queryRecords	<a href="#">Context Query Record</a> []	List of the retrieved context query records.	Small, 59.0	59.0

Query Record Status Result

Output representation of query result status of context data records.

Property Name	Type	Description	Filter Group and Version	Available Version
contextDataRecordStatusId	String	Unique ID associated with the list of context record status required for Lightning Data Service.	Small, 59.0	59.0
isSuccess	Boolean	Indicates whether the status retrieval of context data query records was successful ( <code>true</code> ) or not ( <code>false</code> ).	Small, 59.0	59.0

Property Name	Type	Description	Filter Group and Version	Available Version
queryResult	<a href="#">Context Data Record Status[]</a>	List containing the status of the queried context data records.	Small, 59.0	59.0

## Query Tags

Output representation of query tags result.

### Sample Response

```
{
  "tagValue": {
    "Industry": {
      "contextDataPathBuilder": {
        "pathTokens": [
          "6ba44bdce01b138f7cfd9c7ab414312bf76f4b75362e47adb6ab368714fb5bf",
          "001SB00000M9i21YAB"
        ]
      },
      "dmlStatus": "CREATED",
      "nodeLevelTag": false,
      "tagPath": {
        "pathTokens": []
      }
    }
  }
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
<del>contextDataBuilder</del>	Map<String, Object>	Indicates whether the query operation is complete	Small, 59.0	59.0
pathTokens	String []	List of paths indicating the tag data path.	Small, 59.0	59.0
dmlStatus	String	DML status of the tag value.	Small, 59.0	59.0
nodeLevelTag	Boolean	Indicates if the tag is at the node level (true) or not (false).	Small, 59.0	59.0
tagPath	Map<String, Object>	The path to the tag containing a list of paths indicating the tag path.	Small, 59.0	59.0

## Query Tags Result

Output representation of the results when querying context tags.

Property Name	Type	Description	Filter Group and Version	Available Version
isDone	Boolean	Indicates whether the tag query process is complete (true) or not (false).	Small, 59.0	59.0

Property Name	Type	Description	Filter Group and Version	Available Version
isSuccess	Boolean	Indicates if the query was successful (true) or not (false).	Small, 59.0	59.0
queryResult	<a href="#">Map&lt;String, ContextDefinition&gt;</a> on page 589	Contains a mapping of each queried tag to its results.	Small, 59.0	59.0

## Context Service Apex Reference

Use the built-in Apex class to manage the processes of a context service.

### [Context Namespace](#)

The `Context` namespace provides classes and methods to manage the sharing and consumption of business application data by using Context Service.

## Context Namespace

The `Context` namespace provides classes and methods to manage the sharing and consumption of business application data by using Context Service.

The `Context` namespace includes these classes.

### [IndustriesContext Class](#)

Contains methods to create, query, persist, or delete a context. Also, query a record's status, query a context based on tags, or update context attributes by using the available methods.

## IndustriesContext Class

Contains methods to create, query, persist, or delete a context. Also, query a record's status, query a context based on tags, or update context attributes by using the available methods.

## Namespace

### [Context](#)

### [IndustriesContext Methods](#)

Learn more about the available methods with the `IndustriesContext` class.

## IndustriesContext Methods

Learn more about the available methods with the `IndustriesContext` class.

The `IndustriesContext` class includes these methods.

[buildContext\(input\)](#)

Creates a context.

[deleteContext\(input\)](#)

Deletes a context.

[evictContextDefinition\(input\)](#)

Removes the details of the context definition from cache.

[filteringContext\(input\)](#)

Builds or queries a context based on a filter criteria.

[getContext\(input\)](#)

Retrieves context details.

[getContextTranslation\(input\)](#)

Retrieves context mappings based on a target mapping ID.

[persistContext\(input\)](#)

Persists the current data or state of context to the database.

[queryContextRecordsAndChildren\(input\)](#)

Queries Context records and children based on the dataPath instead of tags.

[queryRecordStatus\(input\)](#)

Queries the status of a record.

[queryTags\(input\)](#)

Queries a context by using tags.

[updateContextAttributes\(input\)](#)

Updates the attributes of a context.

**buildContext(input)**

Creates a context.

**Signature**

```
public Map<String,Object> buildContext(Map<String,Object> input)
```

```
Context.IndustriesContext, buildContext, [Map<String,ANY>], Map<String,ANY>
```

**Example**

```
Context.IndustriesContext industriesContexts = new Context.IndustriesContext();

Map<String, Object> input = new Map<String, Object>();

Map<String, String> metadata = new Map<String, String>();
metadata.put('contextDefinitionId', '110xx0000006PinEAE');
metadata.put('mappingId', '11jxx0000004LGRAA2');

String data =
'{\'Account\':[{\'id\':\'001xx000003GYK0AAO\',\'businessObjectType\':\'Account\'}]}'
input.put('data', data);
```

```
input.put('metadata', metadata);

Map<String, Object> context = industriesContexts.buildContext(input);
System.debug(context.get('contextId'));
```

### Parameters

*input*

Type: Map<String,Object>

Metadata about the context and payload data required to create a context.

### Return Value

Type: Map<String,Object>

Details containing the context ID that's created.

### **deleteContext(input)**

Deletes a context.

### Signature

```
public void deleteContext(Map<String,Object> input)
```

```
Context.IndustriesContext, deleteContext, [Map<String,ANY>], void
```

### Example

```
Context.IndustriesContext industriesContexts = new Context.IndustriesContext();
Map<String, Object> input = new Map<String, Object>();
input.put('contextId', '1f6ef0f4f9f361ef966d8a292db12ce90ce20bef22efb4afac431762ac71998d');
industriesContexts.deleteContext(input);
```

### Parameters

*input*

Type: Map<String,Object>

Details containing the ID of the context to be deleted.

### Return Value

Type: void

### **evictContextDefinition(input)**

Removes the details of the context definition from cache.

**Signature**

```
public void evictContextDefinition(Map<String,ANY> input)
```

```
Context.IndustriesContext, evictContextDefinition, [Map<String,ANY>], void
```

**Example**

```
Context.IndustriesContext industriesContexts = new Context.IndustriesContext();
Map<String, Object> input = new Map<String, Object>();
input.put('contextDefinitionName', 'definitionName');
industriesContexts.evictContextDefinition(input);
```

**Parameters**

*input*

Type: Map<String,ANY>

API name of the context definition to remove the details of the context definition from cache.

**Return Value**

Type: void

**filteringContext(input)**

Builds or queries a context based on a filter criteria.

**Signature**

```
public Map<String, Object> industriesContexts.filteringContext(buildWithFilter);
```

**Example**

Type: *BUILD*

```
Context.IndustriesContext industriesContexts = new Context.IndustriesContext();
Map<String, Object> buildWithFilter = new Map<String, Object>();
Map<String, Object> input = new Map<String, Object>();

Map<String, String> metadata = new Map<String, String>();
metadata.put('contextDefinitionId', '110xx0000006PXVEA2');
metadata.put('mappingId', '11jxx0000004L59AAE');

String data =
'{\'Account\':[{\'id\':\'001xx000003GYiCAAW\',\'businessObjectType\':\'Account\'}]}'
input.put('data', data);
input.put('metadata', metadata);

buildWithFilter.put('type', 'BUILD');
buildWithFilter.put('build', input);
buildWithFilter.put('filter', '{ \'buildFilter\':
{\'Contact\':[{\'filterType\':\'WHERE\',\'node\':\'Contact\',\'attribute\':\'Name\',\'dataType\':\'String\',\'operands\':[{\'Howard
Jones\'],\'operator\':\'Equals\'}]}}');

```

```
Map<String, Object> res = industriesContexts.filteringContext(buildWithFilter);

System.debug(res);
```

Type: *QUERYRECORDANDCHILDREN* or *QUERYRECORDS*

```
Context.IndustriesContext industriesContexts = new Context.IndustriesContext();
Map<String, Object> queryWithFilter = new Map<String, Object>();
Map<String, Object> queryInput = new Map<String, Object>();

List<String> dataPath = new List<String>();
dataPath.add('001xx000003GYiCAAW');

Map<String, Object> contextDataPathInputRepresentation = new Map<String, Object>();
contextDataPathInputRepresentation.put('dataPath', dataPath);

List<Map<String, Object>> queryPaths = new List<Map<String, Object>>();
queryPaths.add(contextDataPathInputRepresentation);

queryInput.put('contextId',
'44410fea80348668bebd58010279c579d611a8f686ebf71e6b2a6b1a6405160f');
queryInput.put('queryPaths', queryPaths);

queryWithFilter.put('type', 'QUERYRECORDANDCHILDREN');
queryWithFilter.put('query', queryInput);
queryWithFilter.put('filter',
'{"queryFilter":[{"filterType":"'WHERE'", "node":"'Contact'", "attribute":"'Name'", "dataType":"'String'", "operands":["Howard Jones"], "operator":"'Equals'"}]}');

Map<String, Object> res = industriesContexts.filteringContext(queryWithFilter);

System.debug(res);
```

## Parameters

*input*

Type: Enum

Object defining the type of operation. Operation Metadata along with filter criteria to be applied on the operation. Valid values are: *BUILD*, *QUERYRECORDANDCHILDREN* and *QUERYRECORDS*

filter: String

Metadata about the filter object.

build: Map<String,Object>

Metadata to build the context. Only for *type* with value *BUILD*.

query: Map<String,Object>

Metadata to query records in the context. Only for *type* with value *QUERYRECORDANDCHILDREN* and *QUERYRECORDS*.

## Return Value

Type: Map<String,Object>

Mapping of the contextId or queryResults with the requested operation type.

### **getContext(input)**

Retrieves context details.

### **Signature**

```
public Map<String,Object> getContext(Map<String,Object> input)
```

```
Context.IndustriesContext, getContext, [Map<String,ANY>], Map<String,ANY>
```

### **Example**

```
Context.IndustriesContext industriesContexts = new Context.IndustriesContext();
Map<String, Object> input = new Map<String, Object>();

input.put('contextId', '03950312e509b6ae5c41653408fe4869efc931cc0ffd0e61f5599daa59a22309');
Map<String, Object> res = industriesContexts.getContext(input);

System.debug(res);
```

### **Parameters**

*input*

Type: Map<String,Object>

Details containing the ID of the context to be retrieved.

### **Return Value**

Type: Map<String,Object>

Details of the retrieved context.

### **getContextTranslation(input)**

Retrieves context mappings based on a target mapping ID.

### **Signature**

```
public Map<String,Object> getContextTranslation(Map<String,Object> input)
```

```
Context.IndustriesContext, getContextTranslation, [Map<String,ANY>], Map<String,ANY>
```

### **Example**

```
Context.IndustriesContext industriesContexts = new Context.IndustriesContext();
Map<String, Object> input = new Map<String, Object>();
input.put('contextId', '1f6ef0f4f9f361ef966d8a292db12ce90ce20bef22efb4afac431762ac71998d');
input.put('contextMappingId', '11jxx0000004LGRAA2');
List<String> persistAttributeTypes = new List<String>();
persistAttributeTypes.add('OUTPUT');
```

```
persistAttributeTypes.add('INPUTOUTPUT');
input.put('persistAttributeTypes', persistAttributeTypes);
Boolean isDependenciesEstablished = false;
input.put('isDependenciesEstablished', isDependenciesEstablished);
Boolean removeRestrictedFields = false;
input.put('removeRestrictedFields', removeRestrictedFields);
Map<String, Object> res = industriesContexts.getContextTranslation(input);
System.debug(res);
```

### Parameters

*input*

Type: Map<String,Object>

Details of the request parameters to retrieve context mappings. The details include list of persisted attributes and settings to indicate whether any dependencies are established or restricted fields are removed.

### Return Value

Type: Map<String,Object>

Details of the retrieved context mappings.

### **persistContext(input)**

Persists the current data or state of context to the database.

### Signature

```
public Map<String,Object> persistContext (Map<String,Object> input)
```

```
Context.IndustriesContext, persistContext, [Map<String,ANY>], Map<String,ANY>
```

### Example

```
Context.IndustriesContext industriesContexts = new Context.IndustriesContext();
Map<String, Object> input = new Map<String, Object>();
input.put('contextId', '5a42181d891c60f0097d50e0e1d52d6009ee3ef593d9ea145e1f4e05996a17c6');
input.put('targetMappingId', '');
Map<String, Object> output = industriesContexts.persistContext(input);
System.debug(output.get('referenceId'));
```

### Parameters

*input*

Type: Map<String,Object>

Details to persist context such as context ID and target mapping ID.

### Return Value

Type: Map<String,Object>

Reference ID for the persisted context.

**queryContextRecordsAndChildren(input)**

Queries Context records and children based on the dataPath instead of tags.

**Signature**

```
Map<String, Object> industriesContexts.queryContextRecordsAndChildren(input: Map<String, Object>);
```

**Example**

```
Context.IndustriesContext industriesContexts = new Context.IndustriesContext();
Map<String, Object> input = new Map<String, Object>();

List<String> dataPath = new List<String>();
dataPath.add('001xx000003GaX6AAK');

Map<String, Object> contextDataPathInputRepresentation = new Map<String, Object>();
contextDataPathInputRepresentation.put('dataPath', dataPath);

List<Map<String, Object>> queryPaths = new List<Map<String, Object>>();
queryPaths.add(contextDataPathInputRepresentation);

input.put('contextId', '7a823bc5f047b1b69aa059b05c3df0ccd69b1bc702e03b4f6c12740d0e277b7b');
input.put('queryPaths', queryPaths);

Map<String, Object> res = industriesContexts.queryContextRecordsAndChildren(input);

System.debug(res);
```

**Parameters**

*input*

contextId: String

ID of the context to be queried.

queryPaths: Map<String,Object>

List of dataPath to be queried.

**Return Value**

queryResults: Map<String,Object>

Result containing the record data.

**queryRecordStatus(input)**

Queries the status of a record.

**Signature**

```
public Map<String,Object> queryRecordStatus(Map<String,Object> input)
```

```
Context.IndustriesContext, queryRecordStatus, [Map<String,ANY>], Map<String,ANY>
```

**Example**

```
Context.IndustriesContext industriesContexts = new Context.IndustriesContext();
Map<String, Object> input = new Map<String, Object>();
input.put('contextId', '5a42181d891c60f0097d50e0e1d52d6009ee3ef593d9ea145e1f4e05996a17c6');
List<Map<String,Object>> queryPaths = new List<Map<String,Object>>();
Map<String,Object> queryPath = new Map<String,Object>();
List<String> dataPaths = new List<String>();
dataPaths.add('TestOrder123');
queryPath.put('dataPath', dataPaths);
queryPaths.add(queryPath);
input.put('queryPaths', queryPaths);
Map<String, Object> output = industriesContexts.queryRecordStatus(input);
```

**Parameters**

*input*

Type: Map<String,Object>

Details containing the context ID and list of record paths for context data to query the status for.

**Return Value**

Type: Map<String,Object>

Details containing the results of the query.

**queryTags (input)**

Queries a context by using tags.

**Signature**

```
public Map<String,Object> queryTags(Map<String,Object> input)
```

```
Context.IndustriesContext, queryTags, [Map<String,ANY>], Map<String,ANY>
```

**Example**

```
Context.IndustriesContext industriesContexts = new Context.IndustriesContext();
Map<String, Object> input = new Map<String, Object>();
List<String> tag = new List<String>();
tag.add('contactNameTag');
input.put('contextId', '967934fc3069c04bb17df94e526052d75ab99fd87393ffad008ed07d7ac54a13');
input.put('tags', tag);
Map<String, Object> output = industriesContexts.queryTags(input);
Map<String, Object> queryresult = (Map<String, Object>)output.get('queryResult');
List<Object> contextTagDataRepresentations= (List<Object>)queryresult.get('contactNameTag');
```

```
Map<String, Object> contextTagDataRepresentation =
    (Map<String, Object>) contextTagDataRepresentations.get(0);
System.debug(contextTagDataRepresentation.get('dataPath'));
System.debug(contextTagDataRepresentation.get('tagValue'));
```

### Parameters

*input*

Type: Map<String, Object>

Details containing the context ID and tags to be queried.

### Return Value

Type: Map<String, Object>

Details containing the results of the query.

### updateContextAttributes (input)

Updates the attributes of a context.

### Signature

```
public Map<String, Object> updateContextAttributes (Map<String, Object> input)
```

```
Context.IndustriesContext, updateContextAttributes, [Map<String, ANY>], Map<String, ANY>
```

### Example

```
Context.IndustriesContext industriesContexts = new Context.IndustriesContext();
Map<String, Object> input = new Map<String, Object>();
Map<String, Object> contextAttributeValueInputRepresentation = new Map<String, Object>();
contextAttributeValueInputRepresentation.put('attributeName', 'Name');
contextAttributeValueInputRepresentation.put('attributeValue', 'Elon');

List<Map<String, Object>> attributes = new List<Map<String, Object>>();
attributes.add(contextAttributeValueInputRepresentation);

List<String> dataPath = new List<String>();
dataPath.add('001xx000003GaX6AAK');

Map<String, Object> contextDataPathInputRepresentation = new Map<String, Object>();
contextDataPathInputRepresentation.put('dataPath', dataPath);

Map<String, Object> nodePathAndAttributesInputRepresentation = new Map<String, Object>();
nodePathAndAttributesInputRepresentation.put('nodePath', contextDataPathInputRepresentation);
nodePathAndAttributesInputRepresentation.put('attributes', attributes);

List<Map<String, Object>> nodePathAndAttributes = new List<Map<String, Object>>();
nodePathAndAttributes.add(nodePathAndAttributesInputRepresentation);

input.put('contextId', 'f4fe20aa8ffb441998a3bba42c7a0452d9b104dcadd9907810cbacff4db7c39a');
```

```
input.put('nodePathAndAttributes', nodePathAndAttributes);

Map<String, Object> res = industriesContexts.updateContextAttributes(input);

System.debug(res.get('isSuccess'));
```

### Parameters

*input*

Type: Map<String,Object>

Details containing the context ID and node path. The node path contains the path of the context record and list of attributes to be updated with their values.

### Return Value

Type: Map<String,Object>

Details containing the updated attribute list.

## Criteria-Based Search and Filter

---

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.

### [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](#).

### [Business APIs](#)

Return search results or retrieve unified object search data.

## 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
<code>dataSyncActive</code>	<p><b>Field Type</b> boolean</p> <p><b>Description</b> Indicates whether the data synchronization operation for the search object is active (<code>true</code>) or not (<code>false</code>). This value does not indicate the status of a Data Processing Engine (DPE) definition, but instead indicates the system job that executes that DPE definition.</p>
<code>dataSyncJob</code>	<p><b>Field Type</b> string</p> <p><b>Description</b> The data synchronization job that updates data in the searchable object at regular intervals.</p>
<code>description</code>	<p><b>Field Type</b> string</p> <p><b>Description</b> The description of a searchable object data sync information record.</p> <p> <b>Note:</b> Description length should not exceed 255 characters.</p>

Field Name	Description
displayFieldSet	<b>Field Type</b> <a href="#">FieldSet</a> <b>Description</b> The fieldset that determines how fields are displayed in the filter panel.
lastDataSyncRunDate	<b>Field Type</b> string <b>Description</b> 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	<b>Field Type</b> <a href="#">Object Mapping</a> <b>Description</b> The mappings for <code>inputObject</code> to <code>outputObject</code> for lookup type fields.
masterLabel	<b>Field Type</b> string <b>Description</b> Required.  A user-friendly name for the use case definition, which is defined when the use case definition is created.
parsingFieldSet	<b>Field Type</b> <a href="#">FieldSet</a> <b>Description</b> The fieldset that determines how fields are parsed for criteria-based search and filter.
picklistMappings	<b>Field Type</b> <b>Description</b> The mappings for <code>inputObject</code> to <code>outputObject</code> for picklist type fields.
scheduleFrequencyInHours	<b>Field Type</b> string <b>Description</b> The frequency at which the data synchronization job is run to refresh data in the searchable object.
searchableObject	<b>Field Type</b> string

Field Name	Description
	<b>Description</b> 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
<code>actionList</code>	<b>Field Type</b> string <b>Description</b> The list of actions that can be launched for a search result. Available in API version 59.0 and later.
<code>aggrCriteriaFieldset</code>	<b>Field Type</b> <a href="#">FieldSet</a> <b>Description</b> The set of fields in the searchable object that can be used as aggregation criteria.
<code>configurationType</code>	<b>Field Type</b> SearchCriteriaConfigurationConfigurationType (enumeration of type string) <b>Description</b> Specifies the configuration type for criteria-based search and filter. Valid values are: <ul style="list-style-type: none"><li>• <code>Default Search</code></li><li>• <code>Clinical Trial Search</code></li></ul>
<code>description</code>	<b>Field Type</b> string <b>Description</b> The description of a search criteria configuration record.
<code>distanceCriteria</code>	<b>Field Type</b> string <b>Description</b> A JSON string that stores the distance configuration attributes used in criteria-based search. The string includes these attributes: <ul style="list-style-type: none"><li>• <code>mapEnabled</code>—Indicates whether to show a map of search results (<code>true</code>) or not (<code>false</code>).</li></ul>

Field Name	Description
	<ul style="list-style-type: none"> <li>• <code>mapMarkerTitleField</code>—The field value to use for the map marker title.</li> <li>• <code>mapMarkerDescriptionField</code>—The field value to use for the map marker description.</li> <li>• <code>options</code>—The higher limit for a distance range.</li> <li>• <code>referenceFieldApiName</code>—A location-type of field to calculate the distance from.</li> <li>• <code>sortByDistance</code>—Indicates whether to include distance criteria in sorting (<code>true</code>) or not (<code>false</code>) for search results displayed as cards.</li> <li>• <code>unit</code>—Kilometers or Miles.</li> </ul>
<code>filterType</code>	<p><b>Field Type</b> SearchCriteriaConfigurationFilterType (enumeration of type string)</p> <p><b>Description</b> Specifies the type of filter criteria to use for criteria-based search and filter. Valid values are:</p> <ul style="list-style-type: none"> <li>• <code>GROUPING_AND_AGGREGATION</code></li> <li>• <code>MULTIPLE_FIELDS</code></li> </ul>
<code>isActive</code>	<p><b>Field Type</b> boolean</p> <p><b>Description</b> Specifies if the search criteria configuration is active (<code>true</code>) or not (<code>false</code>).</p>
<code>masterLabel</code>	<p><b>Field Type</b> string</p> <p><b>Description</b> Required.  A user-friendly name for the search criteria configuration, which is defined when the search criteria configuration is created.</p>
<code>resultDisplayFormat</code>	<p><b>Field Type</b> SearchCriteriaConfigurationResultDisplayFormat (enumeration of type string)</p> <p><b>Description</b> Specifies the display format of search results. Valid values are:</p> <ul style="list-style-type: none"> <li>• <code>LIST</code></li> <li>• <code>CARD</code></li> </ul>
<code>resultFieldset</code>	<p><b>Field Type</b> <a href="#">FieldSet</a></p>

Field Name	Description
	<b>Description</b> The set of fields in the searchable object that can be used as search result columns.
resultFlexCard	<b>Field Type</b> string <b>Description</b> The name of the OmniStudio FlexCard used to display search results as cards.
searchCriteriaFieldset	<b>Field Type</b> <a href="#">FieldSet</a> <b>Description</b> The set of fields in the searchable object that can be used for querying data.
searchableObjDataSyncInfo	<b>Field Type</b> string <b>Description</b> 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	<b>Field Type</b> string <b>Description</b> Required. The object that can be used for criteria-based search and filter.
sortingCriteriaFieldset	<b>Field Type</b> <a href="#">FieldSet</a> <b>Description</b> 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>
  </aggrCriteriaFieldset>
</SearchCriteriaConfiguration>
```

```

    </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>
  </searchCriteriaFieldset>

```

```

<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>
        <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	<p><b>Field Type</b> string</p> <p><b>Description</b> Required. The action that a user can launch for a search result. Specify the ID of an instance that corresponds to your action type.</p>
actionScope	<p><b>Field Type</b> SearchResultActionScope (enumeration of type string)</p> <p><b>Description</b> 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:</p> <ul style="list-style-type: none"><li>• Global</li></ul>
actionType	<p><b>Field Type</b> SearchResultActionType (enumeration of type string)</p> <p><b>Description</b> Required. Specifies the type of action that a user can launch. Values are:</p> <ul style="list-style-type: none"><li>• FlowDefinition</li><li>• LightningWebComponent</li><li>• OmniScript—Available in API version 60.0 and later.</li></ul>
description	<p><b>Field Type</b> string</p> <p><b>Description</b> The description of the search result action configuration.</p>
masterLabel	<p><b>Field Type</b> string</p> <p><b>Description</b> Required. The name of the action that's displayed in the search page.</p>

## 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()`, `describeObjects()`, `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	<p><b>Type</b> textarea</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The description of a searchable object data sync information record. Maximum length allowed is 255 characters.</p>
DeveloperName	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> The developer name of the record.</p>
FullName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Group, Nillable</p> <p><b>Description</b> 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.</p>
IsDataSyncActive	<p><b>Type</b> boolean</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Sort</p>

Field	Details
	<p><b>Description</b></p> <p>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.</p> <p>The default value is <code>false</code>.</p>
LastDataSyncRunDate	<p><b>Type</b></p> <p>dateTime</p> <p><b>Properties</b></p> <p>Filter, Nillable, Sort</p> <p><b>Description</b></p> <p>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.</p>
MasterLabel	<p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Filter, Group, Sort</p> <p><b>Description</b></p> <p>Master label for SearchableObjDataSyncInfo. This internal label doesn't get translated.</p>
Metadata	<p><b>Type</b></p> <p>complexvalue</p> <p><b>Properties</b></p> <p>Create, Nillable, Update</p> <p><b>Description</b></p> <p>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.</p>
ScheduleFrequencyInHours	<p><b>Type</b></p> <p>int</p> <p><b>Properties</b></p> <p>Filter, Group, Nillable, Sort</p> <p><b>Description</b></p> <p>The frequency at which the data synchronization job is run to refresh data in the searchable object.</p>
SearchableObject	<p><b>Type</b></p> <p>picklist</p>

Field	Details
	<b>Properties</b> Filter, Group, Restricted picklist, Sort
	<b>Description</b> The object that's used for criteria-based search and filter. Possible values are: <ul style="list-style-type: none"> <li>• <code>VehicleSearchableField</code>—This value is applicable for Automotive Cloud.</li> </ul>

## 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
<code>ActionList</code>	<b>Type</b> textarea
	<b>Properties</b> Nillable
	<b>Description</b> The list of actions that can be launched for a search result. Available in API version 59.0 and later.
<code>AdditionalSearchCriteria</code>	<b>Type</b> string
	<b>Properties</b> Nillable
	<b>Description</b> The additional configuration attributes used in criteria-based search.

Field	Details
	Available in API version 63.0 and later.
AggrCriteriaFieldsetId	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The set of fields in the searchable object that can be used as aggregation criteria. This field is a relationship field.</p> <p><b>Relationship Name</b> AggrCriteriaFieldset</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> FieldSet</p>
ConfigurationType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Specifies the type of search criteria configuration. Available in API version 63.0 and later. Possible values are:</p> <ul style="list-style-type: none"> <li>CLINICAL_TRAIL_SEARCH</li> <li>DEFAULT_SEARCH</li> </ul>
Description	<p><b>Type</b> textarea</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The description of a search criteria configuration record. Maximum length allowed is 255 characters.</p>
DeveloperName	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> The developer name of the record.</p>

Field	Details
DistanceCriteria	<p><b>Type</b> textarea</p> <p><b>Properties</b> Nillable</p> <p><b>Description</b> A JSON string that stores the distance configuration attributes used in criteria-based search.</p>
FilterType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Specifies the type of filter criteria to use for criteria-based search and filter.  Possible values are:</p> <ul style="list-style-type: none"> <li>GROUPING_AND_AGGREGATION</li> <li>MULTIPLE_FIELDS</li> </ul>
FullName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Group, Nillable</p> <p><b>Description</b> 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.</p>
IsActive	<p><b>Type</b> boolean</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Sort</p> <p><b>Description</b> Indicates whether the search criteria configuration is active (<code>true</code>) or not (<code>false</code>).  The default value is <code>false</code>.</p>
IsSingleFieldSort	<p><b>Type</b> boolean</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Sort</p> <p><b>Description</b> Indicates whether the search results are sorted based on a single field (<code>true</code>) or not (<code>false</code>). Available in API version 63.0 and later.</p>


Field	Details
	The default value is <code>false</code> .
MasterLabel	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> Master label for SearchCriteriaConfiguration. This internal label doesn't get translated.</p>
Metadata	<p><b>Type</b> complexvalue</p> <p><b>Properties</b> Create, Nillable, Update</p> <p><b>Description</b> 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.</p>
ResultDisplayFormat	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Specifies the display format of search results. Possible values are:</p> <ul style="list-style-type: none"> <li>• CARD</li> <li>• LIST</li> </ul>
ResultFieldsetId	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The set of fields in the searchable object that can be used as search result columns. This field is a relationship field.</p> <p><b>Relationship Name</b> ResultFieldset</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> FieldSet</p>

Field	Details
ResultFlexCard	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The name of the OmniStudio FlexCard used to display search results as cards.</p>
SearchCriteriaFieldsetId	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The set of fields in the searchable object that can be used for querying data. This field is a relationship field.</p> <p><b>Relationship Name</b> SearchCriteriaFieldset</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> FieldSet</p>
SearchableObjDataSyncInfoId	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> 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.</p> <p><b>Relationship Name</b> SearchableObjDataSyncInfo</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> SearchableObjDataSyncInfo</p>
SearchableObject	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Restricted picklist, Sort</p>

Field	Details
	<p><b>Description</b></p> <p>The object that can be used for criteria-based search and filter.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>VehicleSearchableField</code>—This value is applicable for Automotive Cloud.</li> </ul>
<code>SortingCriteriaFieldsetId</code>	<p><b>Type</b></p> <p>reference</p> <p><b>Properties</b></p> <p>Filter, Group, Nillable, Sort</p> <p><b>Description</b></p> <p>The set of fields in the searchable object that can be used as sort criteria for search results.</p> <p>This field is a relationship field.</p> <p><b>Relationship Name</b></p> <p>SortingCriteriaFieldset</p> <p><b>Relationship Type</b></p> <p>Lookup</p> <p><b>Refers To</b></p> <p>FieldSet</p>

## 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	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Restricted picklist, Sort</p> <p><b>Description</b> The action that a user can launch for a search result. Specify the ID of an instance that corresponds to your action type.</p>
ActionScope	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Restricted picklist, Sort</p> <p><b>Description</b> 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:</p> <ul style="list-style-type: none"> <li>• Global</li> </ul>
ActionType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Restricted picklist, Sort</p> <p><b>Description</b> Specifies the type of action that a user can launch.  Possible values are:</p> <ul style="list-style-type: none"> <li>• FlowDefinition</li> <li>• LightningWebComponent</li> <li>• OmniScript—Available in API version 60.0 and later.</li> </ul>
Description	<p><b>Type</b> textarea</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The description of the search result action configuration.</p>
DeveloperName	<p><b>Type</b> string</p>

Field	Details
	<p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> The developer name for the search result action configuration.</p>
FullName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Group, Nillable</p> <p><b>Description</b> 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.</p>
Language	<p><b>Type</b> picklist</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> The language of the search result action configuration.</p>
MasterLabel	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> Label for the search result action configuration. In the UI, this field is <b>Name</b>.</p>
Metadata	<p><b>Type</b> <a href="#">SearchResultActionConfig</a></p> <p><b>Properties</b> Create, Nillable, Update</p> <p><b>Description</b> The search result action configuration's metadata.</p>

## Business APIs

Return search results or retrieve unified object search data.

This table lists the available resources.

Resource	Description
<a href="#">/connect/criteria-based-search/configurations</a> (GET)	Retrieve the unified object search data based on the input criteria and the search configuration defined by the administrator.
<a href="#">/connect/criteria-based-search/searchable-object/results</a> (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?fullName=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
<del>ageCriteriaField</del>	String[]	Fields that you select in the search criteria configuration as the basis for querying data.	Optional	58.0
<del>freeTextFieldName</del>	String	Name of the search criteria field used by the user for the search.	Optional	58.0
<del>globalSearchTerm</del>	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
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	<a href="#">Unified Object Search Criteria</a> []	Name of the search criteria configuration.	Optional	58.0
<del>searchCriteriaName</del>	String	Name of the search definition.	Optional	58.0

Name	Type	Description	Required or Optional	Available Version
<a href="#">sortingCriteriaFieldset</a>	<a href="#">Unified Object Search Sort By Field[]</a>	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
<del>applicationCriteriaFieldSet</del>	String[]	Fields that you select in the search criteria configuration as the basis for querying data.	Optional	58.0
<del>freeTextFieldName</del>	String	Name of the search criteria field used by the user for the search.	Optional	58.0
<del>globalSearchTerm</del>	String	The keyword that you use to perform a comprehensive search across all text-indexed columns of the specified object.	Optional	61.0
<del>latitude</del>	Double	User's latitude that's used to find search results within a certain distance from the user's location.	Optional	58.0
<del>longitude</del>	Double	User's longitude that's used to find search results within a certain distance from the user's location.	Optional	58.0
<del>offset</del>	Integer	Number of records to skip before searching for records. The default value is 0.	Optional	61.0
<del>pageNumber</del>	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
<del>pageSize</del>	Integer	Number of search result records on each page.	Optional	58.0
<del>searchCriteria</del>	<a href="#">Unified Object Search Criteria</a> []	Name of the search criteria configuration.	Optional	58.0
<del>searchCriteriaName</del>	String	Name of the search definition.	Optional	58.0
<del>sortingCriteriaFieldSet</del>	<a href="#">Unified Object Search Sort By Field</a> []	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
<del>searchCriteriaFieldName</del>	String	Name of the field by which the user wants to sort search results.	Required	58.0
<del>searchCriteriaFieldOperator</del>	String	Comparison type for the search values. Possible values are: <ul style="list-style-type: none"> <li>• Equals</li> <li>• GreaterThan</li> <li>• GreaterThanOrEqual</li> <li>• In</li> <li>• LessThan</li> <li>• LessThanOrEqual</li> <li>• StartsWith</li> <li>• NotEquals</li> <li>• NotIn</li> <li>• Range</li> </ul>	Required	58.0
<del>searchCriteriaFieldType</del>	String	Search category. Possible values are: <ul style="list-style-type: none"> <li>• Distance</li> <li>• Number</li> <li>• Text</li> </ul>	Required	58.0
<del>searchCriteriaValueList</del>	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 ( <code>true</code> ) or not ( <code>false</code> ) 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

Property Name	Type	Description	Filter Group and Version	Available Version
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
searchSourceFieldName	String	API name of the source field.	Small, 58.0	58.0
searchSourceObjectName	String	Primary domain for lookup type field.	Small, 58.0	58.0
searchSourceRecordType	String	Default record type ID of the source object.	Small, 58.0	58.0
searchFieldType	String	Type of the filter. Possible values are: <ul style="list-style-type: none"> <li>Text</li> <li>Lookup</li> <li>Picklist</li> </ul>	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	<a href="#">Action</a>	List of actions the end user can launch for a search result.	Small, 59.0	59.0
aggregateFields	<a href="#">Field Representation</a>	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
filterType	String	Type of the filter criteria to use for criteria-based search and filter. Possible values are: <ul style="list-style-type: none"> <li><code>GroupingAndAggregation</code></li> <li><code>MultipleFields</code></li> </ul>	Small, 60.0	60.0
objectName	String	Name of the <code>SearchConfig</code> 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: <ul style="list-style-type: none"> <li><code>Card</code></li> <li><code>List</code></li> </ul>	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	<a href="#">Searchable Criteria</a>	Filters that are retrieved as part of the search criteria configuration.	Small, 58.0	58.0

Property Name	Type	Description	Filter Group and Version	Available Version
<del>searchCriteriaConfigurationActive</del>	Boolean	Indicates whether the search criteria configuration is active ( <code>true</code> ) or not ( <code>false</code> ).	Small, 58.0	58.0
<del>searchCriteriaConfigurationName</del>	String	User-friendly name for the <code>SearchConfig</code> object, which is defined when the search configuration is created.	Small, 58.0	58.0
<del>searchCriteriaConfigurationName</del>	String	Name of the search criteria configuration.	Small, 58.0	58.0
sortFields	<a href="#">Field Representation</a>	Set of fields within <code>SearchConfig</code> 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": "HealthCloudPSPProviderCardContainer",
"searchAndFilterFields": [
    {
        "options": [
            ],
        "searchFieldLabel": "Provider Name",
        "searchFieldName": "ProviderName",
        "searchFieldSourceObjectFieldName": "ProviderName",
        "searchFieldSourceObjectName": "CareProviderSearchableField",
        "searchFieldSourceObjectRecordType": "0120000000000000AAA",
        "searchFieldType": "Text"
    },
    {
        "options": [
            ],
        "searchFieldLabel": "Facility Name",
        "searchFieldName": "FacilityName",
        "searchFieldSourceObjectFieldName": "FacilityName",
        "searchFieldSourceObjectName": "CareProviderSearchableField",
        "searchFieldSourceObjectRecordType": "0120000000000000AAA",
        "searchFieldType": "Text"
    },
    {
        "options": [
            ],
        "searchFieldLabel": "Provider Gender",
        "searchFieldName": "ProviderGender",
        "searchFieldSourceObjectFieldName": "ProviderGender",
        "searchFieldSourceObjectName": "CareProviderSearchableField",
        "searchFieldSourceObjectRecordType": "0120000000000000AAA",
        "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	<a href="#">Timeline Error</a>	Details of the error message returned if the request failed to retrieve the search configuration metadata.	Small, 58.0	58.0
<del>searchCriteriaConfigurationList</del>	<a href="#">Unified Object Search Config Metadata</a>	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	<a href="#">Unified Object Search Result</a>	Details of the criteria-based search and filter results.	Small, 58.0	58.0
errors	<a href="#">Timeline Error[]</a>	Details of the errors that were displayed.	Small, 58.0	58.0
mapData	<a href="#">Unified Object Search Result Map Data[]</a>	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

Property Name	Type	Description	Filter Group and Version	Available Version
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	<a href="#">Unified Object Search Result Summary</a>	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	<a href="#">Unified Object Search Result Field[]</a>	The fields selected in the search criteria configuration that are used for grouping and aggregating search results.	Small, 58.0	58.0
searchResultRecords	<a href="#">Unified Object Search Result Record[]</a>	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	<a href="#">Unified Object Search Result Map Data Record</a>	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
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	<a href="#">Unified Object Search Result Record Field Value</a>	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

Property Name	Type	Description	Filter Group and Version	Available Version
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 ( <code>true</code> ) or not ( <code>false</code> ).	Small, 58.0	58.0
isMoreRecordsPresent	Boolean	Indicates whether there are more search records present ( <code>true</code> ) or not ( <code>false</code> ).	Small, 58.0	58.0

# Data Processing Engine, Batch Management, and Monitor Workflow Services

Data Processing Engine and Batch Management help automate your business processes. Use objects, APIs, Platform Events, and invocable actions to define, run, and review Data Processing Engine definitions and Batch Management jobs.

Here's how both these features can automate your business processes:

- **Data Processing Engine:** Transform data that's available in your Salesforce org and write back the transformation results as new or updated records. You can transform the data for standard and custom objects.
- **Batch Management:** Automate the processing of records in scheduled flows. You can process a high volume of standard and custom object records.

Once a Data Processing Engine definition is run or a Batch Management job is run, you can view the progress of the run and the results of the run using Monitor Workflow Services.

## Data Model

Data Processing Engine, Batch Management, and Monitor Workflow Services share a data model. Let's learn about the objects and relationships in this shared data model.

## Common Tooling API Object

BatchJobDefinition is a common Tooling API object that is shared between Data Processing Engine and Batch Management.

## Common Platform Event

Batch Management jobs and Data Processing Engine definitions are run using invocable actions in Flows. Use the BatchJobStatusChanged event to notify subscribers after a Batch Management job or a Data Processing Engine definition is processed in a flow.

## Common Business APIs

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

## Data Processing Engine

Transform data that's available in your Salesforce org and write back the transformation results as new or updated records. You can transform the data for standard and custom objects. Data Processing Engine consists of a Tooling API object, a standard object, a Metadata API, and an invocable action. You can use these to view, create, edit, and run Data Processing Engine definitions.

## Batch Management

Automate the processing of records in scheduled flows. You can process a high volume of standard and custom object records. Batch Management consists of three Tooling API objects, a standard object, a Metadata API, and an invocable action. You can use these resources to view, create, edit, and run Batch Management jobs.

## Monitor Workflow Services

The Monitor Workflow Services standard objects can be used to track the run of Data Processing Engine definitions and Batch Management jobs. During a run, you can view details about each part that the run is broken down into. After the run is complete, you can view its status and the records which weren't processed during the run.

## EDITIONS

Available in: Lightning Experience

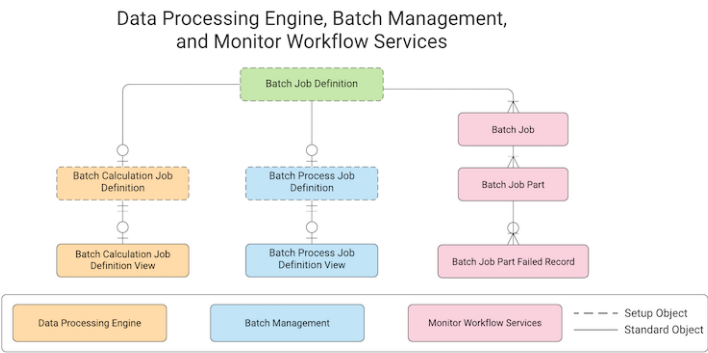
Available in: Data Processing Engine is available with Enterprise, Unlimited, and Performance Editions with the Financial Services Cloud, Loyalty Management, Manufacturing Cloud, Rebate Management, Accounting Subledger, or Provider Search in Health Cloud.

Available in: Batch Management is available with Enterprise, Unlimited, and Performance Editions with the Loyalty Management, Manufacturing Cloud, Rebate Management, or Accounting Subledger

# Data Model

Data Processing Engine, Batch Management, and Monitor Workflow Services share a data model. Let's learn about the objects and relationships in this shared data model.

Here's the data model:



## EDITIONS

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Available in: Batch Management is available with Enterprise, Unlimited, and Performance Editions with the Loyalty Management, Manufacturing Cloud, Rebate Management, or Accounting Subledger

# Common Tooling API Object

BatchJobDefinition is a common Tooling API object that is shared between Data Processing Engine and Batch Management.


Tooling API objects let you interact with metadata for declarative development. For example, you can create your own version of Setup.

[BatchJobDefinition](#)

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

## BatchJobDefinition

Represents the definition of a batch job. 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

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

### Supported REST API Methods

`GET`, `HEAD`, `Query`

### Fields

Field	Details
Description	<div><b>Type</b> textarea</div> <div><b>Properties</b> Filter, Group, Nillable, Sort</div> <div><b>Description</b> The description of the batch job definition.</div>
DeveloperName	<div><b>Type</b> string</div> <div><b>Properties</b> Filter, Group, Sort</div> <div><b>Description</b> The developer name of the batch job.</div>
Language	<div><b>Type</b> picklist</div>

#### EDITIONS

Available in: Lightning Experience

Available in: Data Processing Engine is available with Enterprise, Unlimited, and Performance Editions with the Financial Services Cloud, Loyalty Management, Manufacturing Cloud, Rebate Management, Accounting Subledger, or Provider Search in Health Cloud.

Available in: Batch Management is available with Enterprise, Unlimited, and Performance Editions with the Loyalty Management, Manufacturing Cloud, Rebate Management, or Accounting Subledger

**Field****Details****Properties**

Filter, Group, Restricted picklist, Sort

**Description**

The language in which the batch job is created.

Possible values are:

- af—Afrikaans
- am—Amharic
- ar—Arabic
- ar\_AE—Arabic (United Arab Emirates)
- ar\_BH—Arabic (Bahrain)
- ar\_DZ—Arabic (Algeria)
- ar\_EG—Arabic (Egypt)
- ar\_IQ—Arabic (Iraq)
- ar\_JO—Arabic (Jordan)
- ar\_KW—Arabic (Kuwait)
- ar\_LB—Arabic (Lebanon)
- ar\_LY—Arabic (Libya)
- ar\_MA—Arabic (Morocco)
- ar\_OM—Arabic (Oman)
- ar\_QA—Arabic (Qatar)
- ar\_SA—Arabic (Saudi Arabia)
- 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

Field	Details
	<ul style="list-style-type: none"> <li>• en_AU—English (Australian)</li> <li>• en_CA—English (Canadian)</li> <li>• en_GB—English (UK)</li> <li>• en_HK—English (Hong Kong)</li> <li>• en_IE—English (Ireland)</li> <li>• en_IN—English (Indian)</li> <li>• en_MY—English (Malaysian)</li> <li>• en_NZ—English (New Zealand)</li> <li>• en_PH—English (Phillipines)</li> <li>• en_SG—English (Singapore)</li> <li>• en_US—English</li> <li>• en_ZA—English (South Africa)</li> <li>• eo—Esperanto (Pseudo)</li> <li>• es—Spanish</li> <li>• es_AR—Spanish (Argentina)</li> <li>• es_BO—Spanish (Bolivia)</li> <li>• es_CL—Spanish (Chile)</li> <li>• es_CO—Spanish (Colombia)</li> <li>• es_CR—Spanish (Costa Rica)</li> <li>• es_DO—Spanish (Dominican Republic)</li> <li>• es_EC—Spanish (Ecuador)</li> <li>• es_GT—Spanish (Guatemala)</li> <li>• es_HN—Spanish (Honduras)</li> <li>• es_MX—Spanish (Mexico)</li> <li>• es_NI—Spanish (Nicaragua)</li> <li>• es_PA—Spanish (Panama)</li> <li>• es_PE—Spanish (Peru)</li> <li>• es_PR—Spanish (Puerto Rico)</li> <li>• es_PY—Spanish (Paraguay)</li> <li>• es_SV—Spanish (El Salvador)</li> <li>• es_US—Spanish (United States)</li> <li>• es_UY—Spanish (Uruguay)</li> <li>• es_VE—Spanish (Venezuela)</li> <li>• et—Estonian</li> <li>• eu—Basque</li> <li>• fa—Farsi</li> <li>• fi—Finnish</li> <li>• fr—French</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>• <code>fr_BE</code>—French (Belgium)</li> <li>• <code>fr_CA</code>—French (Canadian)</li> <li>• <code>fr_CH</code>—French (Switzerland)</li> <li>• <code>fr_LU</code>—French (Luxembourg)</li> <li>• <code>ga</code>—Irish</li> <li>• <code>gu</code>—Gujarati</li> <li>• <code>hi</code>—Hindi</li> <li>• <code>hr</code>—Croatian</li> <li>• <code>hu</code>—Hungarian</li> <li>• <code>hy</code>—Armenian</li> <li>• <code>in</code>—Indonesian</li> <li>• <code>is</code>—Icelandic</li> <li>• <code>it</code>—Italian</li> <li>• <code>it_CH</code>—Italian (Switzerland)</li> <li>• <code>iw</code>—Hebrew</li> <li>• <code>iw_EO</code>—Esperanto RTL (Pseudo)</li> <li>• <code>ja</code>—Japanese</li> <li>• <code>ka</code>—Georgian</li> <li>• <code>km</code>—Khmer</li> <li>• <code>kn</code>—Kannada</li> <li>• <code>ko</code>—Korean</li> <li>• <code>lb</code>—Luxembourgish</li> <li>• <code>lt</code>—Lithuanian</li> <li>• <code>lv</code>—Latvian</li> <li>• <code>mi</code>—Te reo</li> <li>• <code>mk</code>—Macedonian</li> <li>• <code>ml</code>—Malayalam</li> <li>• <code>mr</code>—Marathi</li> <li>• <code>ms</code>—Malay</li> <li>• <code>mt</code>—Maltese</li> <li>• <code>my</code>—Burmese</li> <li>• <code>nl_BE</code>—Dutch (Belgium)</li> <li>• <code>nl_NL</code>—Dutch</li> <li>• <code>no</code>—Norwegian</li> <li>• <code>pl</code>—Polish</li> <li>• <code>pt_BR</code>—Portuguese (Brazil)</li> <li>• <code>pt_PT</code>—Portuguese (European)</li> <li>• <code>rm</code>—Romansh</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>• ro—Romanian</li> <li>• ro_MD—Romanian (Moldova)</li> <li>• ru—Russian</li> <li>• sh—Serbian (Latin)</li> <li>• sh_ME—Montenegrin</li> <li>• sk—Slovak</li> <li>• sl—Slovene</li> <li>• sq—Albanian</li> <li>• sr—Serbian (Cyrillic)</li> <li>• sv—Swedish</li> <li>• sw—Swahili</li> <li>• ta—Tamil</li> <li>• te—Telugu</li> <li>• th—Thai</li> <li>• tl—Tagalog</li> <li>• tr—Turkish</li> <li>• uk—Ukrainian</li> <li>• ur—Urdu</li> <li>• vi—Vietnamese</li> <li>• xh—Xhosa</li> <li>• zh_CN—Chinese (Simplified)</li> <li>• zh_HK—Chinese (Hong Kong)</li> <li>• zh_SG—Chinese (Singapore)</li> <li>• zh_TW—Chinese (Traditional)</li> <li>• zu—Zulu</li> </ul>
MasterLabel	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> The label of the batch job.</p>
ProcessGroup	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p>

Field	Details
	<b>Description</b> The group or team that's using the batch job. This field is only applicable to Batch Management jobs.
Status	<b>Type</b> picklist <b>Properties</b> Defaulted on create, Filter, Group, Restricted picklist, Sort <b>Description</b> The status of the batch job. Possible values are: <ul style="list-style-type: none"><li>• Active</li><li>• Inactive</li></ul>
Type	<b>Type</b> picklist <b>Properties</b> Defaulted on create, Filter, Group, Restricted picklist, Sort <b>Description</b> The type of batch job. Possible values are: <ul style="list-style-type: none"><li>• Calc—Data Processing Engine</li><li>• DecisionTableRefresh</li><li>• Flow</li></ul>

# Common Platform Event

Batch Management jobs and Data Processing Engine definitions are run using invocable actions in Flows. Use the BatchJobStatusChanged event to notify subscribers after a Batch Management job or a Data Processing Engine definition is processed in a flow.

## BatchJobStatusChangedEvent

Notifies subscribers of when a batch job is completed in a flow. This object is available in API version 51.0 and later.

## BatchJobStatusChangedEvent

Notifies subscribers of when a batch job is completed in a flow. This object is available in API version 51.0 and later.

### Supported Calls

describeSObjects()

### Supported Subscribers

Subscriber	Supported?
Flows	✓

### Fields

Field	Details
BatchJob	<b>Type</b> string
	<b>Description</b> The unique identifier of the batch job.
BatchJobDefinition	<b>Type</b> string
	<b>Properties</b> Nillable
	<b>Description</b> The unique identifier of the batch job's definition.
EndDateTime	<b>Type</b> dateTime
	<b>Properties</b> Nillable

### EDITIONS

Available in: Lightning Experience

Available in: Data Processing Engine is available with Enterprise, Unlimited, and Performance Editions with the Financial Services Cloud, Loyalty Management, Manufacturing Cloud, Rebate Management, Accounting Subledger, or Provider Search in Health Cloud.

Available in: Batch Management is available with Enterprise, Unlimited, and Performance Editions with the Loyalty Management, Manufacturing Cloud, Rebate Management, or Accounting Subledger

Field	Details
	<b>Description</b> The timestamp for when the batch job execution is complete.
EventUuid	<b>Type</b> string <b>Properties</b> Nillable <b>Description</b> A universally unique identifier (UUID) that identifies a platform event message. This field is available in API version 52.0 and later.
ReplayId	<b>Type</b> string <b>Properties</b> Nillable <b>Description</b> Represents an ID value that is populated by the system and refers to the position of the event in the event stream. Replay ID values aren't guaranteed to be contiguous for consecutive events. A subscriber can store a replay ID value and use it on resubscription to retrieve missed events that are within the retention window.
StartDateTime	<b>Type</b> dateTime <b>Properties</b> Nillable <b>Description</b> The timestamp for when the batch job execution is started.
Status	<b>Type</b> picklist <b>Properties</b> Restricted picklist <b>Description</b> The status of the batch job. Possible values are: <ul style="list-style-type: none"> <li>• Canceled—Canceled</li> <li>• Failure</li> <li>• Success</li> </ul>

## Common Business APIs

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

### [REST Reference](#)

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

## REST Reference

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

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

### [Resources](#)

Here's a list of Common Business API resources.

### [Response Bodies](#)

Here's a list of Common Business API response bodies.

SEE ALSO:

[Connect REST API Developer Guide](#)

## Resources

Here's a list of Common Business API resources.

### [Batch Job Cancel](#)

Cancel a batch job of type data processing engine (calc job) and batch management. A batch job with only the status Submitted or In Progress can be canceled.

## Batch Job Cancel

Cancel a batch job of type data processing engine (calc job) and batch management. A batch job with only the status Submitted or In Progress can be canceled.

### Special Access Rules

To use this resource, the following permissions are required:

- Your org must have the Batch Management and Data Processing Engine licenses
- Users in your org require System Administration profile

### Resource

```
/connect/batch-job/batchJobId/cancel-job
```

### Resource example

```
/connect/batch-job/0mdxx00000000fxAAA/cancel-job
```

### Available version

52.0

**Requires Chatter**

No

**HTTP methods**

POST

**Note:** POST doesn't take request parameters or a request body.**Response body for POST**

Returns HTTP 201 on success.

See [Batch Job Cancel Output](#) for HTTP code descriptions that are unique to this resource in case of failure of the batch job cancel request.

**Response Bodies**

Here's a list of Common Business API response bodies.

[Batch Job Cancel Output](#)

Output representation of the batch job cancel request.

**Batch Job Cancel Output**

Output representation of the batch job cancel request.

Property Name	Type	Description	Filter Group and Version	Available Version
message	String	Details about why the batch job cancel request failed.	Small, 52.0	52.0

This table lists HTTP response code descriptions that are unique to this resource.

HTTP Response Code	Error Code	Description
400	INVALID_STATUS	We can't cancel the batch job that doesn't have an active run. Specify the ID of a batch job with an active run and try again.
400	INVALID_STATUS	We can't cancel the batch job that is already canceled or completed. Specify the ID of a valid batch job with the status InProgress or Submitted and try again.
400	DELETE_FAILED	We can't cancel the batch job of which the results are already being written back.
400	DELETE_FAILED	We can't cancel the batch job because of an error in processing your org's data. Run the Data Processing Engine definition and try again.
403	FORBIDDEN	You don't have the permission to cancel a batch job. Ask your Salesforce admin for help.
404	RESOURCE_NOT_FOUND	Specify the ID of a valid batch job and try again.

HTTP Response Code	Error Code	Description
500	INTERNAL_SERVER_ERROR	Something went wrong when we tried to cancel the batch job. Try again or ask your Salesforce admin for help.

## Data Processing Engine

Transform data that's available in your Salesforce org and write back the transformation results as new or updated records. You can transform the data for standard and custom objects. Data Processing Engine consists of a Tooling API object, a standard object, a Metadata API, and an invocable action. You can use these to view, create, edit, and run Data Processing Engine definitions.

### [Data Processing Engine Tooling API Objects](#)

Data Processing Engine consists of one Tooling API object, BatchCalcJobDefinition. Use this object to create and edit a Data Processing Engine definition.

### [Data Processing Engine Standard Object](#)

Data Processing Engine contains one standard object, BatchCalcJobDefinitionView. Use this object to view all the Data Processing Engine definitions available in your Salesforce org, including file-based definitions.

### [Data Processing Engine Metadata API](#)

Use a Metadata API to create, update, and activate Data Processing Engine definitions.

### [Data Processing Engine Invocable Actions](#)

Run an active Data Processing Engine definition. For more information on custom invocable actions, see [REST API Developer Guide](#) and [Actions Developer Guide](#).

### EDITIONS

Available in: Lightning Experience

Available in: Data Processing Engine is available with Enterprise, Unlimited, and Performance Editions with the Financial Services Cloud, Loyalty Management, Manufacturing Cloud, Rebate Management, Accounting Subledger, or Provider Search in Health Cloud.

## Data Processing Engine Tooling API Objects

Data Processing Engine consists of one Tooling API object, BatchCalcJobDefinition. Use this object to create and edit a Data Processing Engine definition.

Tooling API objects let you interact with metadata for declarative development. For example, you can create your own version of Setup.

### [BatchCalcJobDefinition](#)

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

### BatchCalcJobDefinition

Represents a Data Processing Engine (DPE) definition. 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.

### EDITIONS

Available in: Lightning Experience

Available in: Data Processing Engine is available with Enterprise, Unlimited, and Performance Editions with the Financial Services Cloud, Loyalty Management, Manufacturing Cloud, Rebate Management, Accounting Subledger, or Provider Search in Health Cloud.

## Supported SOAP API Calls

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

## Supported REST API Methods

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

## Fields

Field	Details
<code>BatchJobDefinitionId</code>	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The unique identifier of the associated batch job definition. This is a relationship field.</p> <p><b>Relationship Name</b> BatchJobDefinition</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> BatchJobDefinition</p>
<code>DefinitionRunMode</code>	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>Batch</code></li> <li>• <code>OnDemand—On Demand</code></li> </ul> <p>The default value is <code>Batch</code>.</p>
<code>DeveloperName</code>	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> The developer name of the Data Processing Engine definition.</p>

Field	Details
ExecutionPlatformType	<p><b>Type</b> Picklist</p> <p><b>Properties</b> <b>Filter, Group, Restricted picklist, Sort, Not-Null</b></p> <p><b>Description</b> Specifies the platform that's used to run the Data Processing Engine definition. Possible values:</p> <ul style="list-style-type: none"> <li>• CRMA—CrmAnalytics</li> <li>• CDP—DataCloudForMarketing</li> <li>• CORE—This value is reserved for internal use.</li> </ul>
FullName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Group, Null</p> <p><b>Description</b> The name of the Data Processing Engine definition.</p> <p>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.</p>
IsTemplate	<p><b>Type</b> boolean</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Sort</p> <p><b>Description</b> Indicates whether this is a template Data Processing Engine definition.</p>
Language	<p><b>Type</b> picklist</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Null, Restricted picklist, Sort</p> <p><b>Description</b> The language in which this Data Processing Engine definition is created.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• da—Danish</li> <li>• de—German</li> <li>• en_US—English</li> <li>• es—Spanish</li> <li>• es_MX—Spanish (Mexico)</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>• <code>fi</code>—Finnish</li> <li>• <code>fr</code>—French</li> <li>• <code>it</code>—Italian</li> <li>• <code>ja</code>—Japanese</li> <li>• <code>ko</code>—Korean</li> <li>• <code>nl_NL</code>—Dutch</li> <li>• <code>no</code>—Norwegian</li> <li>• <code>pt_BR</code>—Portuguese (Brazil)</li> <li>• <code>ru</code>—Russian</li> <li>• <code>sv</code>—Swedish</li> <li>• <code>th</code>—Thai</li> <li>• <code>zh_CN</code>—Chinese (Simplified)</li> <li>• <code>zh_TW</code>—Chinese (Traditional)</li> </ul>
ManageableState	<p><b>Type</b> ManageableState enumerated list</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Indicates the manageable state of the specified component that is contained in a package:</p> <ul style="list-style-type: none"> <li>• <code>beta</code></li> <li>• <code>deleted</code></li> <li>• <code>deprecated</code></li> <li>• <code>deprecatedEditable</code></li> <li>• <code>installed</code></li> <li>• <code>installedEditable</code></li> <li>• <code>released</code></li> <li>• <code>unmanaged</code></li> </ul>
MasterLabel	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> Label of the Data Processing Engine definition.</p>
Metadata	<p><b>Type</b> complexvalue</p> <p><b>Properties</b> Create, Nillable, Update</p>

Field	Details
	<p><b>Description</b></p> <p>Data Processing Engine definition's metadata.</p> <p>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.</p>
NamespacePrefix	<p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Filter, Group, Nillable, Sort</p> <p><b>Description</b></p> <p>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 <b><i>namespacePrefix__componentName</i></b> notation.</p> <p>The namespace prefix can have one of the following values:</p> <ul style="list-style-type: none"> <li>• 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.</li> <li>• 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.</li> </ul>
ProcessType	<p><b>Type</b></p> <p>picklist</p> <p><b>Properties</b></p> <p>Filter, Group, Restricted picklist, Sort</p> <p><b>Description</b></p> <p>Required. The process type for which the Data Processing Engine definition is created.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• AccountingPeriodClosure—Legal Entity Accounting Period Closure</li> <li>• AccountingSubledger—This value is reserved for internal use.</li> <li>• ActionableList</li> <li>• AdvancedAccountForecast</li> <li>• BenefitManagement—Available in API version 61.0 and later.</li> <li>• BillingSchedulesforInvoiceGeneration—Billing Schedules for Invoice Generation</li> <li>• ChannelInventoryManagement—Available in API version 63.0 and later.</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>• <code>CriteriaBsdSearchAndFilter</code> - Criteria-Based Search And Filter</li> <li>• <code>CSVCoreUpload</code>—This value is reserved for internal use.</li> <li>• <code>DataProcessingEngine</code> - Standard</li> <li>• <code>DecisionMatrixDataUpload</code> - This value is available only if you have Business Rules Engine enabled.</li> <li>• <code>Decisiontable</code>—Decision table activation</li> <li>• <code>EmployeeService</code>—Available in API version 63.0 and later.</li> <li>• <code>FinancialSummaryRollup</code>—Available in API version 62.0 and later.</li> <li>• <code>FSCHierarchyRollUp</code></li> <li>• <code>FundraisingRollups</code>—Available in API version 63.0 and later.</li> <li>• <code>InvoiceGeneration</code>—Available in API version 62.0 and later.</li> <li>• <code>LegalEntityAccountingPeriodClosureAdvanced</code>—Available in API version 63.0 and later.</li> <li>• <code>LifeSciencesCommercialTerritoryAlignment</code>—Available in API version 63.0 and later.</li> <li>• <code>Loyalty</code></li> <li>• <code>LoyaltyPartnerManagement</code></li> <li>• <code>LoyaltyPointsAggregation</code></li> <li>• <code>NetZero</code></li> <li>• <code>NextGenForecasting</code>—Available in API version 62.0 and later.</li> <li>• <code>PnmRosterFileUpload</code>—Available in API version 62.0 and later.</li> <li>• <code>PriceProtection</code>—Available in API version 62.0 and later.</li> <li>• <code>ProductCatalogManagement</code>—Available in API version 62.0 and later.</li> <li>• <code>ProgramBasedBusiness</code></li> <li>• <code>ProgramManagementRollups</code></li> <li>• <code>ProviderSearch</code>—This value is reserved for internal use.</li> <li>• <code>Rebates</code></li> <li>• <code>Recruitment</code>—Available in API version 62.0 and later.</li> <li>• <code>RevenueTransactionManagement</code>—Available in API version 63.0 and later.</li> <li>• <code>SalesAgreement</code>—Available in API version 63.0 and later.</li> <li>• <code>TestProcessType</code>—Available in API version 62.0 and later.</li> <li>• <code>UsageManagement</code>—Available in API version 62.0 and later.</li> </ul> <p>When Data Processing Engine is enabled for a Salesforce org, the default value is 'Standard'. Other process types may be available to you depending on your industry solution and permission sets.</p>

## Data Processing Engine Standard Object


Data Processing Engine contains one standard object, BatchCalcJobDefinitionView. Use this object to view all the Data Processing Engine definitions available in your Salesforce org, including file-based definitions.

[BatchCalcJobDefinitionView](#)

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

### BatchCalcJobDefinitionView

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

 **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 Calls

`describeSObjects()`, `query()`

### Fields

Field	Details
DataSpaceApiName	<p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Filter, Group, Nillable, Sort</p> <p><b>Description</b></p> <p>Stores the data space API name from Data Cloud.</p>
Description	<p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Filter, Group, Nillable, Sort</p> <p><b>Description</b></p> <p>The description of a Data Processing Engine definition.</p>
DefinitionRunMode	<p><b>Type</b></p> <p>picklist</p> <p><b>Properties</b></p> <p>Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p>

EDITIONS

Available in: Lightning Experience

Available in: Data Processing Engine is available with Enterprise, Unlimited, and Performance Editions with the Financial Services Cloud, Loyalty Management, Manufacturing Cloud, Rebate Management, Accounting Subledger, or Provider Search in Health Cloud.

Field	Details
	<p><b>Description</b></p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• Batch</li> <li>• OnDemand—On Demand</li> </ul> <p>The default value is Batch.</p>
DurableId	<p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Filter, Group, Nillable, Sort</p> <p><b>Description</b></p> <p>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.</p>
ExecutionPlatformType	<p><b>Type</b></p> <p>Picklist</p> <p><b>Properties</b></p> <p><b>Filter, Group, Restricted picklist, Sort, Not-Nillable</b></p> <p><b>Description</b></p> <p>Specifies the platform that's used to run the Data Processing Engine definition. Possible values:</p> <ul style="list-style-type: none"> <li>• CRMA: CrmAnalytics</li> <li>• CDP: DataCloudForMarketing</li> </ul>
InstalledPackageName	<p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Filter, Group, Nillable, Sort</p> <p><b>Description</b></p> <p>The name of the package used to add the definition to the org.</p>
IsActive	<p><b>Type</b></p> <p>boolean</p> <p><b>Properties</b></p> <p>Defaulted on create, Filter, Group, Sort</p> <p><b>Description</b></p> <p>Indicates whether the definition is active.</p>
IsTemplate	<p><b>Type</b></p> <p>boolean</p>

Field	Details
	<p><b>Properties</b> Defaulted on create, Filter, Group, Sort</p> <p><b>Description</b> Indicates whether the definition is a template. You can make a copy of a template definition and update it based on your requirements.</p>
LastModifiedBy	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The unique identifier of the user who modified the definition last.</p>
ManageableState	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Indicates the manageable state of the definition if it's contained in a package. Possible values are:</p> <ul style="list-style-type: none"> <li>• beta—Managed-Beta</li> <li>• deleted—Managed-Proposed-Deleted</li> <li>• deprecated—Managed-Proposed-Deprecated</li> <li>• deprecatedEditable—SecondGen-Installed-Deprecated</li> <li>• installed—Managed-Installed</li> <li>• installedEditable—SecondGen-Installed-Editable</li> <li>• released—Managed-Released</li> <li>• unmanaged—Unmanaged</li> </ul>
MasterLabel	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The label of the Data Processing Engine definition.</p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p>

Field	Details
	<b>Description</b> The name of the Data Processing Engine definition.
NamespacePrefix	<b>Type</b> string <b>Properties</b> Filter, Group, Nillable, Sort <b>Description</b> The namespace prefix associated with this object. Each Developer Edition organization that creates a managed package has a unique namespace prefix. Limit: 15 characters. You can refer to a component in a managed package by using the namespacePrefix__componentName notation. The namespace prefix can have one of the following values: <ul style="list-style-type: none"> <li>• 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.</li> <li>• 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.</li> </ul>
ProcessType	<b>Type</b> picklist <b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort <b>Description</b> The process type of the definition. Possible values are: <ul style="list-style-type: none"> <li>• AccountingPeriodClosure—Legal Entity Accounting Period Closure—Available in API version 62.0 and later.</li> <li>• ActionableList</li> <li>• AdvancedAccountForecast</li> <li>• BenefitManagement—Available in API version 61.0 and later.</li> <li>• BillingSchedulesforInvoiceGeneration—Billing Schedules for Invoice Generation—Available in API version 62.0 and later.</li> <li>• ChannelInventoryManagement—Available in API version 63.0 and later.</li> <li>• CriteriaBsdSearchAndFilter - Criteria-Based Search And Filter</li> <li>• DataProcessingEngine - Standard</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>• <code>DecisionMatrixDataUpload</code>—This value is available only if you have Business Rules Engine enabled.</li> <li>• <code>Decisiontable</code>—Decision table activation—Available in API version 62.0 and later.</li> <li>• <code>EmployeeService</code>—Available in API version 63.0 and later.</li> <li>• <code>FinancialSummaryRollup</code>—Available in API version 63.0 and later.</li> <li>• <code>FSCHierarchyRollUp</code></li> <li>• <code>FundraisingRollups</code>—Available in API version 63.0 and later.</li> <li>• <code>InvoiceGeneration</code>—Available in API version 62.0 and later.</li> <li>• <code>LegalEntityAccountingPeriodClosureAdvanced</code>—Available in API version 63.0 and later.</li> <li>• <code>LifeSciencesCommercialTerritoryAlignment</code>—Available in API version 63.0 and later.</li> <li>• <code>Loyalty</code></li> <li>• <code>LoyaltyPartnerManagement</code></li> <li>• <code>LoyaltyPointsAggregation</code></li> <li>• <code>NetZero</code></li> <li>• <code>NextGenForecasting</code>—Available in API version 62.0 and later.</li> <li>• <code>PnmRosterFileUpload</code>—Available in API version 62.0 and later.</li> <li>• <code>PriceProtection</code>—Available in API version 62.0 and later.</li> <li>• <code>ProductCatalogManagement</code>—Available in API version 63.0 and later.</li> <li>• <code>ProgramBasedBusiness</code></li> <li>• <code>ProgramManagementRollups</code></li> <li>• <code>Rebates</code></li> <li>• <code>RevenueTransactionManagement</code>—Available in API version 63.0 and later.</li> <li>• <code>AccountingSubledger</code>—This value is reserved for internal use.</li> <li>• <code>ProviderSearch</code>—This value is reserved for internal use.</li> <li>• <code>Recruitment</code>—Available in API version 62.0 and later.</li> <li>• <code>SalesAgreement</code>—Available in API version 63.0 and later.</li> <li>• <code>TestProcessType</code>—Available in API version 62.0 and later.</li> <li>• <code>UsageManagement</code>—Available in API version 62.0 and later.</li> </ul> <p>When Data Processing Engine is enabled for a Salesforce org, the default value is 'Standard'. Other process types may be available to you depending on your industry solution and permission sets.</p>

## Data Processing Engine Metadata API

Use a Metadata API to create, update, and activate Data Processing Engine definitions.

### [BatchCalcJobDefinition](#)

Represents a Data Processing Engine definition.

### BatchCalcJobDefinition

Represents a Data Processing Engine definition.

### Parent Type

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

### File Suffix and Directory Location

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

### Version

BatchCalcJobDefinition components are available in API version 51.0 and later.

### Special Access Rules

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

- Loyalty Management
- Financial Services Cloud
- Rebate Management
- Manufacturing Cloud
- Net Zero Cloud

### Fields

Field Name	Field Type	Description
<code>aggregates</code>	<a href="#">BatchCalcJobAggregate[]</a>	Collection of aggregate nodes in a data processing engine.
<code>appends</code>	<a href="#">BatchCalcJobUnion[]</a>	Collection of append nodes in a data processing engine.
<code>atomicWritebacks</code>	<a href="#">BatchCalcJobAtomicWriteback[]</a>	Collection of atomic writeback nodes in a data processing engine definition. Available in API version 62.0 and later.
<code>customNodes</code>	<a href="#">BatchCalcJobCustomNode[]</a>	Collection of custom nodes in a data processing engine. Available in API version 57.0 and later.
<code>dataSpaceApiName</code>	string	Stores the Data Space API Name from Data Cloud. Available in API version 60.0 and later.

### EDITIONS

Available in: Lightning Experience

Available in: Data Processing Engine is available with Enterprise, Unlimited, and Performance Editions with the Financial Services Cloud, Loyalty Management, Manufacturing Cloud, Rebate Management, Accounting Subledger, or Provider Search in Health Cloud.

Field Name	Field Type	Description
<code>datasources</code>	<a href="#">BatchCalcJobDataSource[]</a>	Collection of data source nodes in a data processing engine.
<code>definitionRunMode</code>	<a href="#">BatchRunMode</a> (enumeration of type string)	Specifies the execution mode in a data processing engine. Valid values are: <ul style="list-style-type: none"> <li>• <code>Batch</code></li> <li>• <code>OnDemand</code></li> </ul>
<code>description</code>	string	Description of a data processing engine definition.
<code>executionPlatformType</code>	<a href="#">ExecutionPlatformType</a> (enumeration of type string)	The platform that's used to run the Data Processing Engine definition. Valid values are: <ul style="list-style-type: none"> <li>• <code>CRMA</code></li> <li>• <code>CDP</code></li> <li>• <code>CORE</code></li> </ul> Available in API version 59.0 and later.
<code>filters</code>	<a href="#">BatchCalcJobFilter[]</a>	Collection of filter nodes in a data processing engine. definition.
<code>forecasts</code>	<a href="#">BatchCalcJobForecast[]</a>	Collection of forecast nodes in a data processing engine. definition. Available in API version 58.0 and later.
<code>hierarchyPaths</code>	<a href="#">BatchCalcJobHierarchyPath[]</a>	Collection of hierarchy path nodes in a data processing engine definition.
<code>isTemplate</code>	boolean	Indicates whether it's a template data processing engine definition.
<code>joins</code>	<a href="#">BatchCalcJobSourceJoin[]</a>	Collection of join nodes in a data processing engine.
<code>label</code>	string	The label of a data processing engine definition.
<code>parameters</code>	<a href="#">BatchCalcJobParameter[]</a>	Collection of input variables in a data processing engine.
<code>processType</code>	<a href="#">BatchCalcProcessType</a> (enumeration of type string)	The process type of a data processing engine. Valid values are: <ul style="list-style-type: none"> <li>• <code>UsageManagement</code></li> <li>• <code>AccountingPeriodClosure</code></li> <li>• <code>AccountingSubledger</code>—This value is reserved for internal use.</li> <li>• <code>ActionableList</code></li> <li>• <code>AdvancedAccountForecast</code></li> <li>• <code>BenefitManagement</code></li> <li>• <code>BillingSchedulesforInvoiceGeneration</code></li> <li>• <code>CDPEnrichment</code></li> <li>• <code>ChannelInventoryManagement</code>—Available in API version 63.0 and later.</li> <li>• <code>CriteriaBsdSearchAndFilter</code></li> </ul>

Field Name	Field Type	Description
		<ul style="list-style-type: none"> <li>• DataProcessingEngine</li> <li>• DecisionMatrixDataUpload</li> <li>• Decisiontable</li> <li>• Education</li> <li>• EmployeeService—Available in API version 63.0 and later.</li> <li>• FinancialSummaryRollup</li> <li>• FSCHierarchyRollUp</li> <li>• FundraisingRollups—Available in API version 63.0 and later.</li> <li>• InvoiceGeneration</li> <li>• Loyalty</li> <li>• LegalEntityAccountingPeriodClosureAdvanced—Available in API version 63.0 and later.</li> <li>• LifeScienceBatchCalesCommercialTerritoryAlignment—Available in API version 63.0 and later.</li> <li>• LoyaltyPartnerManagement</li> <li>• LoyaltyPointsAggregation</li> <li>• NextGenForecasting</li> <li>• NetZero</li> <li>• PnmRosterFileUpload</li> <li>• PriceProtection</li> <li>• ProductCatalogManagement</li> <li>• ProgramBasedBusiness</li> <li>• ProviderSearch—This value is reserved for internal use.</li> <li>• Rebates</li> <li>• Recruitment</li> <li>• RevenueTransactionManagement—Available in API version 63.0 and later.</li> <li>• SalesAgreement—Available in API version 63.0 and later.</li> <li>• TestProcessType</li> </ul>
status	BatchJobDefinition Status (enumeration of type string)	Status of a data processing engine definition. Valid values are: <ul style="list-style-type: none"> <li>• Active</li> <li>• Inactive</li> </ul>
transforms	<a href="#">BatchCalcJobTransform[]</a>	Collection of data transformation nodes in a data processing engine.
writebacks	<a href="#">BatchCalcJobWriteback Object[]</a>	Collection of writeback objects in which the results of the data processing engine are written back.

## BatchCalcJobAggregate

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

### Fields

Field Name	Field Type	Description
description	string	Description of an aggregate node.
fields	<a href="#">BatchCalcJobAggregateField[]</a>	Required. Collection of aggregation fields.
groupBy	string[]	Required. Collections of fields used to group data in an aggregate node.
label	string	Required. Label of an aggregate node.
name	string	Required. Name of an aggregate node.
sourceName	string	Required. Name of the source node.

## BatchCalcJobAggregateField

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

### Fields

Field Name	Field Type	Description
aggregateFunction	<a href="#">BatchCalcJobAggregateFunction</a> (enumeration of type string)	Required. Function used for aggregation. Valid values are: <ul style="list-style-type: none"> <li>• <b>Unique</b>—A count of unique values.</li> <li>• <b>Sum</b>—The sum of all values.</li> <li>• <b>Max</b>—The largest value.</li> <li>• <b>Min</b>—The smallest value.</li> <li>• <b>Avg</b>—The average value, calculated as the mean.</li> <li>• <b>Std</b>—The standard deviation.</li> <li>• <b>StdP</b>—A standard deviation with population variance.</li> <li>• <b>Var</b>—The variance.</li> <li>• <b>VarP</b>—The variance with population.</li> <li>• <b>Count</b>—The total count of values.</li> </ul>
alias	string	Required. Name that subsequent nodes within the data processing engine use to refer to the aggregate field.
sourceFieldName	string	Required. Source node field on which the aggregate is calculated.

## BatchCalcJobAtomicWriteback

Represents a node in a DPE definition that stores the details about the relationship between the writeback nodes and the atomic writeback operations between the nodes.

Field Name	Field Type	Description
description	string	Description of the atomic writeback object.
label	string	Required. Name of the atomic writeback object.
name	string	Required. API name of the atomic writeback object.
writebackObjectRelationships	<a href="#">BatchAtomicWritebackRelationship</a>	Specifies the relationship between the writeback objects that are involved in the writeback operation.
writebackSequence	int	Sequence in which the data processing engine executes the atomic write back node.

## BatchCalcJobAtomicWritebackRelationship

Represents the relationships between the writeback objects that are involved in an atomic writeback operation. It captures the relationships between these objects and the sequence in which they should be processed.

Field Name	Field Type	Description
childWritebackObjectField	string	Field name that's associated with the child writeback object in an atomic writeback relationship. Available in API version 63.0 and later.
childWritebackObjectName	string	Name of the child writeback object that's associated with the writeback relationship.
parentWritebackObjectField	string	Field name that's associated with the parent writeback object in an atomic writeback relationship. Available in API version 63.0 and later.
parentWritebackObjectName	string	Required. Name of the parent writeback object that's associated with the writeback relationship.
sequenceNumber	int	Sequence number of the writeback node that's associated with its parent node in the relationship.

## BatchCalcJobCustomNode

Represents a collection of custom nodes in a data processing engine. Use a custom node to add a custom action.

### Fields

Field Name	Field Type	Description
description	string	Description of a custom node.
extensionName	string	Required. Name of an extension node.
extensionNamespace	string	Required. Namespace of an extension node.

Field Name	Field Type	Description
label	string	Required. Label of a custom node.
name	string	Required. Name of a custom node.
parameters	<a href="#">BatchCalcJobCustomNodeParameter</a> []	The field mappings of an extension node.
sources	string[]	Sources of an extension node.

### BatchCalcJobCustomNodeParameter

Represents the field mappings of an extension node.

#### Fields

Field Name	Field Type	Description
name	string	Required. Name of a parameter.
value	string	Required. Value of a parameter.

### BatchCalcJobDatasource

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

#### Fields

Field Name	Field Type	Description
CSVDelimiter	<a href="#">BatchCalcJobCSVDelimiter</a> (enumeration of type string)	<p>Specifies the field separator to read fields from a CSV file record.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• COMMA</li> <li>• BACKQUOTE</li> <li>• CARET</li> <li>• PIPE</li> <li>• SEMICOLON</li> <li>• TAB</li> </ul> <p>The default value is <code>COMMA</code>.</p> <p>The same delimiter value used for the CSV file can't be used within any of the column values in the file. If you mistakenly use the same delimiter value in column values, it can cause data parsing issues.</p>
description	string	Description of a data source node.
fields	<a href="#">BatchCalcJobDatasourceField</a> []	Required. Collection of data source fields.

Field Name	Field Type	Description
<code>fileIdentifier</code>	string	Specifies the source of the file or file storage system.
<code>filePath</code>	string	The file path for the specified file.
<code>fileSource</code>	BatchCalcJobFileSource (enumeration of type string)	Specifies the source of the file or file storage system. Possible value is: <ul style="list-style-type: none"> <li>• <code>ContentManagement</code></li> </ul>
<code>label</code>	string	Required. Label of a data source node.
<code>name</code>	string	Required. Name of a data source node.
<code>sourceName</code>	string	Required. Name of a standard or custom object from which the data source node extracts data.
<code>type</code>	BatchCalcJobDataSource Type (enumeration of type string)	Required. Type of object for the source object field. Supported values are: <ul style="list-style-type: none"> <li>• <code>Analytics</code></li> <li>• <code>CalculatedInsightsObject</code></li> <li>• <code>CRMObject</code></li> <li>• <code>CSV</code></li> <li>• <code>DataModelObject</code></li> <li>• <code>StandardObject</code></li> </ul>

### BatchCalcJobDatasourceField

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

### Fields

Field Name	Field Type	Description
<code>alias</code>	string	Name that subsequent nodes within the data processing engine use to refer to the data source field. Required when the field name is lookup.
<code>dataType</code>	BatchCalcJobDataType (enumeration of type string)	Specifies the data type of the input field when using a CSV file as a data source. Possible values are: <ul style="list-style-type: none"> <li>• <code>Text</code></li> <li>• <code>Numeric</code></li> <li>• <code>Date</code></li> <li>• <code>DateTime</code></li> <li>• <code>MultiValue</code></li> </ul>
<code>isPrimaryKey</code>	boolean	Indicates whether a column name is the primary key ( <code>true</code> ) or not ( <code>false</code> ) for the Data Cloud CSV file.

Field Name	Field Type	Description
name	string	Required. Name of the field. Can be either of the following: <ul style="list-style-type: none"> <li>Name of the source field selected in the associated data source object.</li> <li>Name from a nested lookup object with three child levels.</li> </ul>

## BatchCalcJobFilter

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

### Fields

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

## BatchCalcJobForecast

Represents a collection of fields relating to a forecast node in a data processing engine. Available in API version 58.0 and later.

### Fields

Field Name	Field Type	Description
accuracy	<a href="#">BatchCalcJobFrstAccuracy</a> (enumeration of type string)	The interval percentage to account for errors in forecasts. Possible values are: <ul style="list-style-type: none"> <li>Eighty</li> <li>NinetyFive</li> </ul>

Field Name	Field Type	Description
<del>aggrFlds</del>	<del>BatchCalcJobFrcstAggrFld[]</del>	<ul style="list-style-type: none"> <li>None</li> </ul> <p>The default value is None.</p>
<del>dateFld</del>	<del>string</del>	<p>The list of fields to forecast.</p> <p>Required.</p> <p>The date field from the source node used to forecast values for the specified forecast length.</p>
<del>description</del>	<del>string</del>	<p>The description of the forecast node.</p>
<del>forecastModel</del>	<del>BatchCalcJobFrcstModel (enumeration of type string)</del>	<p>The model used to forecast data.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>Additive</li> <li>Auto</li> <li>Multiplicative</li> </ul> <p>The default value is Auto.</p>
<del>forecastPeriod</del>	<del>int</del>	<p>The number of time periods to generate forecast data. For example, if you select Year-Month as the forecast period type, and 4 as the forecast period count, the forecast results are generated for the next 4 months.</p> <p>The minimum and the default count is 1, and the maximum is 100.</p>
<del>forecastPeriodType</del>	<del>BatchCalcJobFrcstPeriodType (enumeration of type string)</del>	<p>Required.</p> <p>The type of forecast period to group date field values in the forecast results.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>FiscalYear</li> <li>FiscalYearMonth</li> </ul>

Field Name	Field Type	Description
		<ul style="list-style-type: none"> <li>FiscalYearQuarter</li> <li>FiscalYearWeek</li> <li>Year</li> <li>YearMonth</li> <li>YearMonthDay</li> <li>YearQuarter</li> <li>YearWeek</li> </ul>
<del>groupFields</del>	BatchCalcJobFrstGrpFld[]	The source fields for grouping the data to be processed by the forecast node.
label	string	<p>Required.</p> <p>The name of the forecast node in the UI.</p>
name	string	<p>Required.</p> <p>A unique name for the forecast node.</p>
<del>periodDate</del>	string	<p>Required.</p> <p>The start date of the forecast period.</p>
<del>seasonality</del>	BatchCalcJobFrstSeasonality (enumeration of type string)	<p>Represents the periodic fluctuations that occur around the same time every year.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>Two</li> <li>Three</li> <li>Four</li> <li>Five</li> <li>Six</li> <li>Seven</li> <li>Eight</li> <li>Nine</li> <li>Ten</li> <li>Eleven</li> <li>Twelve</li> </ul>

Field Name	Field Type	Description
		<ul style="list-style-type: none"> <li>Thirteen</li> <li>Fourteen</li> <li>Fifteen</li> <li>Sixteen</li> <li>Seventeen</li> <li>Eighteen</li> <li>Nineteen</li> <li>Twenty</li> <li>TwentyOne</li> <li>TwentyTwo</li> <li>TwentyThree</li> <li>TwentyFour</li> <li>Auto</li> <li>None</li> </ul> <p>The default value is None.</p>
<del>ignoreLastPeriod</del>	boolean	<p>Indicates whether to ignore the last period in the source node when it has incomplete data (<code>true</code>) or not (<code>false</code>).</p> <p>The default value is <code>false</code>.</p>
<del>sourceName</del>	string	<p>Required.</p> <p>The name of the source node.</p> <p>A source can be any node other than the <code>datasink</code> and <code>register</code> node.</p>

### BatchCalcJobFrcstAggrFld

Represents a list of fields to forecast in a forecast node.

Field Name	Field Type	Description
<code>aggregateFunction</code>	BatchCalcJobAggregateFunction (enumeration of type string)	<p>Required.</p> <p>The function of the aggregate field.</p> <p>Possible values are:</p>

Field Name	Field Type	Description
		<ul style="list-style-type: none"> <li>• Avg</li> <li>• Count</li> <li>• Max</li> <li>• Min</li> <li>• Std</li> <li>• StdP</li> <li>• Sum</li> <li>• Unique</li> <li>• Var</li> <li>• VarP</li> </ul>
aggregationResultLabel	string	<p>Required.</p> <p>The name of the aggregation result generated from the aggregation function that's applied to the source node field.</p>
fieldName	string	<p>Required.</p> <p>The name of the source field.</p>

### BatchCalcJobFrcstGrpFld

Represents source fields for grouping the data to be processed by the forecast node.

Field Name	Field Type	Description
fieldName	string	<p>Required.</p> <p>The name of the source field to group the data to be processed by the forecast node.</p>
groupBy	string	<p>A comma-separated list of values to group data by.</p> <p>Required when the source field type is Date or DateTime.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• Second</li> <li>• Second Epoch</li> <li>• Minute</li> <li>• Hour</li> <li>• Day</li> <li>• Day Epoch</li> <li>• Week</li> <li>• </li> <li>• Month</li> </ul>

Field Name	Field Type	Description
		<ul style="list-style-type: none"> <li>Quarter</li> <li>Year</li> </ul>

### BatchCalcJobHierarchyPath

Represents a collection of hierarchy path nodes in a data processing engine definition.

#### Fields

Field Name	Field Type	Description
description	string	Description of the hierarchy path node.
hierarchyFieldName	string	Required. Field name that contains the hierarchy path.
isSelfFieldValueIncluded	boolean	Indicates whether the self value is included in the calculated hierarchy path (True) or not (False).
label	string	Required. Label of the hierarchy path node.
name	string	Required. Name of the hierarchy path node.
parentFieldName	string	Required. Parent field name to calculate hierarchy path.
selfFieldName	string	Required. Self field name to calculate hierarchy path.
sourceName	string	Required. Name of the source node.

### BatchCalcJobFilterCriteria

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

#### Fields

Field Name	Field Type	Description
inputVariable	string	Name of the input variable used as a filter.
operator	BatchCalcJobFilterOperator (enumeration of type string)	Required. Operator that is specified in the filter condition. Valid values are: <ul style="list-style-type: none"> <li>Equals</li> <li>NotEquals</li> <li>GreaterThan</li> <li>GreaterThanOrEqual</li> <li>LessThan</li> <li>LessThanOrEqual</li> <li>StartsWith</li> </ul>

Field Name	Field Type	Description
		<ul style="list-style-type: none"> <li>• EndsWith</li> <li>• Contains</li> <li>• DoesNotContain</li> <li>• IsNull</li> <li>• IsNotNull</li> <li>• In</li> <li>• NotIn</li> </ul>
sequence	integer	Required. Sequence number used to refer the criteria in a filter node.
sourceFieldName	string	Required. Name of the field from the source node to apply the filter.
value	string	Value used to filter data from the source node.

### BatchCalcJobParameter

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

#### Fields

Field Name	Field Type	Description
dataType	BatchCalcJobParameter DataType (enumeration of type string)	Required. Data type of the parameter. Valid values are: <ul style="list-style-type: none"> <li>• Date</li> <li>• DateTime</li> <li>• Expression</li> <li>• FileIdentifier</li> <li>• Filter</li> <li>• Numeric</li> <li>• Text</li> </ul>
defaultValue	string	Default value of the parameter.
description	string	Description of the batch calculation job parameter.
isMultiValue	boolean	Indicates whether the parameter has different values ( <code>True</code> ) or not ( <code>False</code> ). This field is supported only for the <code>Text</code> data type.
label	string	Required. Label of the batch calculation job parameter.
name	string	Required. Name of the batch calculation job parameter.

### BatchCalcJobSourceJoin

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

## Fields

Field Name	Field Type	Description
description	string	Description of the join node.
fields	<a href="#">BatchCalcJobJoinResultField[]</a>	Collection of fields in a join node.
joinKeys	<a href="#">BatchCalcJobJoinKey[]</a>	Collection of mapping of fields from the primary source node and the second source node in a join node.
label	string	Required. Label of the join node.
name	string	Required. Name of the join node.
primarySourceName	string	Required. Name associated with the node as the primary source node.
secondarySourceName	string	Required. Name associated with the node as the secondary source node.
type	BatchCalcJobSourceJoinType (enumeration of type string)	Required. Type of join specified between the primary source node and secondary source node. Valid values are: <ul style="list-style-type: none"> <li>• LeftOuter</li> <li>• RightOuter</li> <li>• Inner</li> <li>• Outer</li> <li>• Lookup</li> </ul>

## BatchCalcJobJoinKey

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

## Fields

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

## BatchCalcJobJoinResultField

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

## Fields

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

## BatchCalcJobTransform

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

## Fields

Field Name	Field Type	Description
description	string	The description of the batch calculation job transform.
droppedFields	<a href="#">BatchCalcJobTransformDroppedField[]</a>	The collection of dropped fields in a data transformation. Available when the transformation type is <code>Slice</code> .
expressionFields	<a href="#">BatchCalcJobTransformAddedField[]</a>	The collection of formula fields in a data transformation. Available when the transformation type is <code>Expression</code> .
label	string	Required. The label of the batch calculation job transform.
name	string	Required. The name of the batch calculation job transform.
orderBy	<a href="#">BatchCalcJobOrderByField</a> on page 684[]	A collection of fields that's used to sort the records within each partition group.
partitionBy	string[]	A group of fields that's used to partition the source data into partition groups.
sourceName	string	Required. Name of the source node.
transformType	BatchCalcJobTransformType (enumeration of type string)	Required. The type of transformation. Valid values are: <ul style="list-style-type: none"> <li>• <code>ComputeRelative</code>—This transformation calculates values based on values of the same partition group.</li> <li>• <code>Expression</code>—This transformation calculates values based on existing values of fields in the same record.</li> <li>• <code>Slice</code>—This transformation removes fields from the source node.</li> </ul>

## BatchCalcJobTransformDroppedField

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

## Fields

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

## BatchCalcJobTransformAddedField

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

## Fields

Field Name	Field Type	Description
alias	string	Required. Name that subsequent nodes within the data processing engine use to the transform node.
dataType	BatchCalcJobDataType (enumeration of type string)	Required. Data type of the formula. Valid values are: <ul style="list-style-type: none"> <li>• Text</li> <li>• Numeric</li> <li>• Date</li> <li>• DateTime</li> <li>• MultiValue</li> </ul>
decimalPlaces	integer	Number of digits to the right of a decimal point in the value. Required for the Numeric data type.
expression	string	Required. Formula defined by the user.
length	integer	Total length of the value including the decimal places. Required for data types: Text and Numeric.

## BatchCalcJobOrderByField

Represents a collection of fields that are used to sort the partitioned data.

## Fields

Field Name	Field Type	Description
name	string	Required. Name of the field that is used to sort data.
orderType	BatchCalcJobOrderType (enumeration of type string)	Order in which the data is sorted. Valid values are: <ul style="list-style-type: none"> <li>• Ascending</li> <li>• Descending</li> </ul>

## BatchCalcJobUnion

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

### Fields

Field Name	Field Type	Description
description	string	Description of the batch calculation job union.
isDisjointedSchema	boolean	Indicates whether the union is of two disjointed datasets ( <code>true</code> ) or not ( <code>false</code> ). Set to <code>True</code> to allow joining of two datasets having no common fields.
label	string	Required. Label of the batch calculation job union.
name	string	Required. Name of the batch calculation job union.
sources	string[]	Names of the source nodes.

## BatchCalcJobWritebackObject

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

### Fields

Field Name	Field Type	Description
description	string	Descriptions of the batch calculation job writeback object.
externalIdFieldName	string	Unique external field ID for the target object name. Available in API version 60.0 and later.
fields	<a href="#">BatchCalcJobWriteback Mapping</a> []	Collection of the writeback fields.
filterCondition	string	The condition that filters the records from a writeback dataset for a user. Examples of a filter condition include a user ID, stage name, and a security policy that returns only the records that a user owns. Available in API version 57.0 and later.
folderName	string	The folder where the writeback dataset is saved. Available in API version 57.0 and later.
isChangedRow	boolean	Indicates whether a row in the write back object is changed. Set to <code>True</code> to write back the changed rows.
isExistingDataset	boolean	Indicates whether a CRM Application (CRMA) dataset or a Data Cloud Data Lake object is present ( <code>true</code> ) or will be created ( <code>false</code> ). Available in API version 62.0 and later.
label	string	Required. Name of the write back object.

Field Name	Field Type	Description
name	string	Required. Name of the batch calculation job write back object.
operationType	BatchCalcJobWritebackOpn (enumeration of type string)	Type of operation specified. Valid values are: <ul style="list-style-type: none"> <li>• Delete—This value is available in API version 56.0 and later.</li> <li>• Insert</li> <li>• Overwrite—Available only when <code>storageType</code> is <code>DataLakeObject</code>. This value is available in API version 60.0 and later.</li> <li>• Update</li> <li>• Upsert</li> </ul>
sharingInheritanceObjectName	string	The name of the source object from which the row-level sharing inheritance settings are applied. Available in API version 57.0 and later.
sourceName	string	Required. Name of the source node associated with the write back object.
storageType	BatchCalcJobWritebackType (enumeration of type string)	Specifies where you want to use the data stored in the source node. Available in API version 57.0 and later. Valid values are: <ul style="list-style-type: none"> <li>• Analytics</li> <li>• DataLakeObject</li> <li>• sObject</li> </ul> The default value is <code>sObject</code> .
targetObjectName	string	Required. Object that is inserted or upserted by the data processing engine.
writebackSequence	integer	Sequence in which the target object is updated by the data processing engine.
writebackUser	string	ID of the user whose permissions decide which objects and fields of the target object can be updated.

## BatchCalcJobWritebackMapping

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

### Fields

Field Name	Field Type	Description
parentName	string	Name of the lookup object. Required only when the <code>relationshipName</code> field is defined.
relationshipName	string	Name of the lookup relationship.

Field Name	Field Type	Description
runtimeParameter	boolean	Indicates whether the source field from runtime parameter is <code>true</code> or <code>false</code> . The default value is <code>false</code> .  Available in API version 59.0 and later.
sourceFieldName	string	Required. Name of the field in the source node that is written back.
targetFieldName	string	Name of the sObject field to which the results are written back.

## Declarative Metadata Sample Definition

The following is an example of a BatchCalcJobDefinition component.

```
<?xml version="1.0" encoding="UTF-8"?>
<BatchCalcJobDefinition xmlns="http://soap.sforce.com/2006/04/metadata">
  <aggregates>
    <description>Aggregate Description</description>
    <fields>
      <aggregateFunction>Count</aggregateFunction>
      <alias>NameCount</alias>
      <sourceFieldName>Name</sourceFieldName>
    </fields>
    <groupBy>ContactId</groupBy>
    <groupBy>Name</groupBy>
    <label>AggregateOpportunities</label>
    <name>AggregateOpportunities</name>
    <sourceName>Opportunity</sourceName>
  </aggregates>
  <forecasts>
    <description>ForecastNode Description</description>
    <label>ContactForecast</label>
    <name>ContactForecast</name>
    <sourceName>Contact</sourceName>
    <dateFieldName>CreatedDate</dateFieldName>
    <forecastPeriodType>YearMonth</forecastPeriodType>
    <shouldExcludeLastPeriod>false</shouldExcludeLastPeriod>
    <forecastPeriodCount>12</forecastPeriodCount>
    <periodStartDateName>CreatedDateYM</periodStartDateName>
    <forecastModelType>Auto</forecastModelType>
    <seasonality>None</seasonality>
    <accuracyPercent>None</accuracyPercent>
    <aggregationFields>
      <aggregateFunction>Count</aggregateFunction>
      <aggregationResultLabel>CountOfLastName</aggregationResultLabel>
      <fieldName>LastName</fieldName>
    </aggregationFields>
    <groupFields>
      <fieldName>LastModifiedDate</fieldName>
      <groupBy>Week</groupBy>
    </groupFields>
  </forecasts>
</appends>
```

```

    <description>Append desc</description>
    <isDisjointedSchema>true</isDisjointedSchema>
    <label>AppendAllAccounts</label>
    <name>AppendAllAccounts</name>
    <sources>AccountsOfManufacturingIndustry</sources>
    <sources>ComputeRelativeManufacturingIndustry</sources>
  </appends>
</datasources>
<description>Desc Contact</description>
<fields>
  <alias>Id</alias>
  <name>Id</name>
  <isPrimaryKey>false</isPrimaryKey>
  <dataType>Text</dataType>
</fields>
<fields>
  <alias>LastName</alias>
  <name>LastName</name>
  <isPrimaryKey>false</isPrimaryKey>
  <dataType>Text</dataType>
</fields>
<fields>
  <alias>CreatedDate</alias>
  <name>CreatedDate</name>
  <isPrimaryKey>false</isPrimaryKey>
  <dataType>Date</dataType>
</fields>
<fields>
  <alias>LastModifiedDate</alias>
  <name>LastModifiedDate</name>
  <isPrimaryKey>false</isPrimaryKey>
  <dataType>Date</dataType>
</fields>
<label>Contact</label>
<name>Contact</name>
<sourceName>Contact</sourceName>
<type>StandardObject</type>
<fileSource>ContentManagement</fileSource>
<fileIdentifier>069xx0000004CAeAAM</fileIdentifier>
<CSVDelimiter>COMMA</CSVDelimiter>
<filePath>parentFolder/childFolder</filePath>
</datasources>
<datasources>
  <fields>
    <alias>Name</alias>
    <name>Name</name>
    <isPrimaryKey>false</isPrimaryKey>
    <dataType>Text</dataType>
  </fields>
  <fields>
    <alias>ContactId</alias>
    <name>ContactId</name>
    <isPrimaryKey>false</isPrimaryKey>
    <dataType>Text</dataType>
  </fields>

```

```

    </fields>
    <label>Opportunity</label>
    <name>Opportunity</name>
    <sourceName>Opportunity</sourceName>
    <type>StandardObject</type>
    <fileSource>ContentManagement</fileSource>
    <fileIdentifier>069xx0000004CAeAAM</fileIdentifier>
    <CSVDelimiter>COMMA</CSVDelimiter>
    <filePath>parentFolder/childFolder</filePath>
  </datasources>
  <description>Calculates and creates transaction journal records based on the orders
placed by the loyalty program members. The transaction journals are used to accrue points
to the member.</description>
  <filters>
    <criteria>
      <operator>Equals</operator>
      <sequence>1</sequence>
      <sourceFieldName>LastName</sourceFieldName>
      <value>Salesforce</value>
    </criteria>
    <description>Filter Desc</description>
    <filterCondition>1</filterCondition>
    <isDynamicFilter>false</isDynamicFilter>
    <label>AccountsOfManufacturingIndustry</label>
    <name>AccountsOfManufacturingIndustry</name>
    <sourceName>AccountOpportunities</sourceName>
  </filters>
  <hierarchyPaths>
    <description>Hierarchy Path Node</description>
    <hierarchyFieldName>Hierarchy_Path</hierarchyFieldName>
    <isSelfFieldValueIncluded>true</isSelfFieldValueIncluded>
    <label>Get Hierarchy</label>
    <name>Get_Hierarchy</name>
    <parentFieldName>ContactId</parentFieldName>
    <selfFieldName>LastName</selfFieldName>
    <sourceName>AppendAllAccounts</sourceName>
  </hierarchyPaths>
  <isTemplate>false</isTemplate>
  <joins>
    <description>Left Outer Join</description>
    <fields>
      <alias>ContactId</alias>
      <sourceFieldName>Id</sourceFieldName>
      <sourceName>Contact</sourceName>
    </fields>
    <fields>
      <alias>LastName</alias>
      <sourceFieldName>LastName</sourceFieldName>
      <sourceName>Contact</sourceName>
    </fields>
    <fields>
      <alias>NameCount</alias>
      <sourceFieldName>NameCount</sourceFieldName>
      <sourceName>AggregateOpportunities</sourceName>
    </fields>
  </joins>

```

```

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

```

```

<definitionRunMode>Batch</definitionRunMode>
<status>Inactive</status>
<transforms>
  <description>transforms Desc</description>
  <expressionFields>
    <alias>NewLastName</alias>
    <dataType>Text</dataType>
    <expression>TODAY () </expression>
    <length>80</length>
  </expressionFields>
  <label>ManufacturingIndustry</label>
  <name>ManufacturingIndustry</name>
  <sourceName>AccountsOfManufacturingIndustry</sourceName>
  <transformationType>Expression</transformationType>
</transforms>
<transforms>
  <droppedFields>
    <sourceFieldName>NewLastName</sourceFieldName>
  </droppedFields>
  <label>MediaIndustry</label>
  <name>MediaIndustry</name>
  <sourceName>ManufacturingIndustry</sourceName>
  <transformationType>Slice</transformationType>
</transforms>
<transforms>
  <description>compute relative transforms Desc</description>
  <expressionFields>
    <alias>NewLastName</alias>
    <dataType>Text</dataType>
    <expression>rank () </expression>
    <length>80</length>
  </expressionFields>
  <label>ComputeRelativeManufacturingIndustry</label>
  <name>ComputeRelativeManufacturingIndustry</name>
  <orderBy>
    <name>LastName</name>
    <orderType>Ascending</orderType>
  </orderBy>
  <partitionBy>LastName</partitionBy>
  <sourceName>MediaIndustry</sourceName>
  <transformationType>ComputeRelative</transformationType>
</transforms>
<customNodes>
  <name>RebatesCustomNode</name>
  <label>Rebates Custom Node</label>
  <description>customNodes Desc</description>
  <sources>Get_Hierarchy</sources>
  <extensionName>RebatesExpression</extensionName>
  <extensionNamespace>industries_mfg</extensionNamespace>
  <parameters>
    <name>inputColumn</name>
    <value>LastName</value>
  </parameters>
</customNodes>

```

```

        <name>isFilterCriteria</name>
        <value>true</value>
    </parameters>
    <parameters>
        <name>outputColumn</name>
        <value>GenName</value>
    </parameters>
</customNodes>
<writebacks>
    <fields>
        <sourceFieldName>GenName</sourceFieldName>
        <targetFieldName>LastName</targetFieldName>
    </fields>
    <isChangedRow>>false</isChangedRow>
    <label>exportToContact</label>
    <name>exportToContact</name>
    <description>Export To Contact</description>
    <operationType>Insert</operationType>
    <sourceName>RebatesCustomNode</sourceName>
    <targetObjectName>Contact</targetObjectName>
    <writebackSequence>1</writebackSequence>
</writebacks>
<writebacks>
    <fields>
        <sourceFieldName>CreatedDateYM</sourceFieldName>
        <targetFieldName>CreatedDate</targetFieldName>
    </fields>
    <isChangedRow>>false</isChangedRow>
    <isExistingDataset>>false</isExistingDataset>
    <label>exportToContactFC</label>
    <name>exportToContactFC</name>
    <description>Export To Contact</description>
    <operationType>Insert</operationType>
    <sourceName>ContactForecast</sourceName>
    <targetObjectName>Contact</targetObjectName>
    <writebackSequence>2</writebackSequence>
</writebacks>
</BatchCalcJobDefinition>

```

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

```

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

Data Processing Engine Invocable Actions

Run an active Data Processing Engine definition. For more information on custom invocable actions, see [REST API Developer Guide](#) and [Actions Developer Guide](#).

[Data Processing Engine Actions](#)

Run an active Data Processing Engine definition. This action executes a Data Processing Engine definition asynchronously.

Data Processing Engine Actions

Run an active Data Processing Engine definition. This action executes a Data Processing Engine definition asynchronously.

A Data Processing Engine definition transforms data from your Salesforce org and writes back the results to your org. For more information about running Data Processing Engine definitions, see [Run a Data Processing Engine Definition](#) in Salesforce Help.

This object is available in API version 51.0 and later.

Supported REST HTTP Methods

URI

`/services/data/vxx.x/actions/custom/dataProcessingEngineAction`

Formats

JSON

HTTP Methods


GET, POST

Authentication

Authorization: Bearer *token*

Inputs

Use the GET method to retrieve input variables of a Data Processing Engine definition. The input variables of each Data Processing Engine definition are unique. The Data Processing Engine action uses the input variables to execute the Data Processing Engine definition and generate a batch job ID.

 **Note:** You can't use this action to start two simultaneous runs of a definition with the same input variables.

Outputs

Output	Details
batchJobId	Type string

**Output****Details****Description**

ID of the batch job generated after the request is successful. This ID is used to track the progress of the batch job in Monitor Workflow Services.

**Usage****JSON Sample Request to execute PointsAccrual DPE Definition**

```
{
  "PointsAccrual" : {
    "memberTier" : "Gold",
    "minimumPointBalanceRequired" : "50000",
    "pointType" : "non-qualifying"
  }
}
```

**JSON Sample Response**

```
{
  "actionName": "PointsAccrual",
  "errors": null,
  "isSuccess": true,
  "outputValues": {
    "batchJobId": "01Mxx0000A000001EAA"
  }
}
```

**Example****GET**

This example shows how to retrieve input variables of a Data Processing Engine action type.

```
curl --include --request GET \
--header "Authorization: Authorization: Bearer 00DR...xyz" \
--header "Content-Type: application/json" \
"https://instance.salesforce.com/services/data/v60.0/actions/custom/dataProcessingEngineAction/newinputvardefn"
```

**POST**

Here's a request to retrieve DPE definition

```
{
  "inputs": [
    {
      "start_date": "26-09-2023",
      "end_date": "12-12-2023",
      "randomkey": "069SM0000001SgbYAE"
    }
  ]
}
```

Here's a response for this action.

```
[
  {
    "actionName": "newinputvardefn",
    "errors": null,
    "invocationID": null,
    "isSuccess": true,
    "outputValues": {
      "batchJobId": "0mdSM0000006EJdYAM",
      "accepted": true
    },
    "version": 1
  }
]
```

## Batch Management

Automate the processing of records in scheduled flows. You can process a high volume of standard and custom object records. Batch Management consists of three Tooling API objects, a standard object, a Metadata API, and an invocable action. You can use these resources to view, create, edit, and run Batch Management jobs.

### [Batch Management Tooling API Objects](#)

You can use the Batch Management Tooling API object to view the settings of Batch Management jobs.

### [Batch Management Standard Objects](#)

Batch Management contains a standard BatchProcessJobDefinitionView object, which you can use to view all the batch jobs available in your Salesforce org, including file-based jobs.

### [Batch Management Metadata API](#)

Use a Metadata API to create, update, and activate Batch Management jobs.

### [Batch Management Invocable Actions](#)

Run an active Batch Management job definition. For more information on custom invocable actions, see [REST API Developer Guide](#) and [Actions Developer Guide](#).

### EDITIONS

Available in: Lightning Experience

Available in: Batch Management is available with Enterprise, Unlimited, and Performance Editions with the Loyalty Management, Manufacturing Cloud, Rebate Management, or Accounting Subledger

## Batch Management Tooling API Objects

You can use the Batch Management Tooling API object to view the settings of Batch Management jobs.


Tooling API objects let you interact with metadata for declarative development. For example, you can create your own version of Setup.

### [BatchProcessJobDefinition](#)

Represents the details of a Batch Management job. This object is available in API version 51.0 and later.

### BatchProcessJobDefinition

Represents the details of a Batch Management job. 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.

Data and processes in your org are impacted if you update or delete a BatchProcessJobDefinition record. Update or delete a Batch Management job using the [Metadata API](#) on page 704.

### Supported SOAP API Calls

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

### Supported REST API Methods

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

### Fields

Field	Details
BatchJobDefinitionId	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The unique identifier of the associated batch job definition. This is a relationship field.</p> <p><b>Relationship Name</b> BatchJobDefinition</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> BatchJobDefinition</p>

#### EDITIONS

Available in: Lightning Experience

Available in: Batch Management is available with Enterprise, Unlimited, and Performance Editions with the Loyalty Management, Manufacturing Cloud, Rebate Management, or Accounting Subledger

Field	Details
BatchJobDefinitionName	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The name of the associated batch job definition.</p>
BatchSize	<p><b>Type</b> int</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> Required. The number of records that each Batch Management job part can process. The maximum number of transaction journal records that a batch management job can process for flow or loyalty program process is 2000.</p>
Description	<p><b>Type</b> textarea</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The description of the Batch Management job.</p>
DeveloperName	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> The developer name of the Batch Management job.</p>
FlowDefinitionId	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The input variable of the associated flow that uniquely identifies each record that the Batch Management job processes.</p>
FullName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Group, Nillable</p>

Field	Details
	<p><b>Description</b></p> <p>The name of the Batch Management job.</p> <p>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.</p>
Language	<p><b>Type</b></p> <p>picklist</p> <p><b>Properties</b></p> <p>Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b></p> <p>The language in which the batch job is created.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• da—Danish</li> <li>• de—German</li> <li>• en_US—English</li> <li>• es—Spanish</li> <li>• es_MX—Spanish (Mexico)</li> <li>• fi—Finnish</li> <li>• fr—French</li> <li>• it—Italian</li> <li>• ja—Japanese</li> <li>• ko—Korean</li> <li>• nl_NL—Dutch</li> <li>• no—Norwegian</li> <li>• pt_BR—Portuguese (Brazil)</li> <li>• ru—Russian</li> <li>• sv—Swedish</li> <li>• th—Thai</li> <li>• zh_CN—Chinese (Simplified)</li> <li>• zh_TW—Chinese (Traditional)</li> </ul>
ManageableState	<p><b>Type</b></p> <p>ManageableState enumerated list</p> <p><b>Properties</b></p> <p>Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b></p> <p>Indicates the manageable state of the specified component that is contained in a package:</p> <ul style="list-style-type: none"> <li>• beta</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>deleted</li> <li>deprecated</li> <li>deprecatedEditable</li> <li>installed</li> <li>installedEditable</li> <li>released</li> <li>unmanaged</li> </ul>
MasterLabel	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> The label of the Batch Management job.</p>
Metadata	<p><b>Type</b> complexvalue</p> <p><b>Properties</b> Create, Nillable, Update</p> <p><b>Description</b> The Batch Management job's metadata.</p> <p>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.</p>
NamespacePrefix	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> 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 <b><i>namespacePrefix__componentName</i></b> notation.</p> <p>The namespace prefix can have one of the following values.</p> <ul style="list-style-type: none"> <li>In Developer Edition orgs, <b><i>NamespacePrefix</i></b> 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.</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>In orgs that are not Developer Edition orgs, <code>NamespacePrefix</code> is set only for objects that are part of an installed managed package. All other objects have no namespace prefix.</li> </ul>
ProcessGroup	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The group or team for which the Batch Management job processes records.</p>
RecordIdVariable	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The unique identifier that identifies each record that must be processed by the Batch Management job.</p>
RetryCount	<p><b>Type</b> int</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Sort</p> <p><b>Description</b> Required. The number of times this Batch Management job must be rerun in case it fails.</p>
RetryInterval	<p><b>Type</b> int</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Sort</p> <p><b>Description</b> Required. The number of milliseconds after which the Batch Management job must be rerun in case it fails. A retry interval can be 1,000–10,000 milliseconds.</p>
Status	<p><b>Type</b> picklist</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> The status of the Batch Management job. Possible values are:</p> <ul style="list-style-type: none"> <li>Active</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>Inactive</li> </ul>
Type	<p><b>Type</b> picklist</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> The type of process for which the Batch Management job processes records. Possible values are:</p> <ul style="list-style-type: none"> <li>DecisionTableRefresh</li> <li>Flow</li> <li>LoyaltyProgramProcess</li> </ul> <p>The default value is Flow. This field is available in API version 55.0 and later.</p>
TypeInstance	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> Required. The API name of the process that the Batch Management job must execute.</p>

## Batch Management Standard Objects

Batch Management contains a standard BatchProcessJobDefinitionView object, which you can use to view all the batch jobs available in your Salesforce org, including file-based jobs.

### [BatchProcessJobDefView](#)

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

### BatchProcessJobDefView

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

### Supported Calls

`describeSObjects()`, `query()`

### EDITIONS

Available in: Lightning Experience

Available in: Batch Management is available with Enterprise, Unlimited, and Performance Editions with the Loyalty Management, Manufacturing Cloud, Rebate Management, or Accounting Subledger

## Fields

Field	Details
DurableId	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> 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.</p>
IsActive	<p><b>Type</b> boolean</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Sort</p> <p><b>Description</b> Indicates whether the definition is active.</p>
Label	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The label of the Batch Job definition.</p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The name of the Batch Job definition.</p>
NamespacePrefix	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> 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:</p>

Field	Details
	<ul style="list-style-type: none"> <li>In Developer Edition organizations, the namespace prefix is set to the namespace prefix of the organization for all objects that support it. There is an exception if an object is in an installed managed package. In that case, the object has the namespace prefix of the installed managed package. This field's value is the namespace prefix of the Developer Edition organization of the package developer.</li> <li>In organizations that are not Developer Edition organizations, NamespacePrefix is only set for objects that are part of an installed managed package. There is no namespace prefix for all other objects.</li> </ul>
ProcessDefinition	<p><b>Type</b> textarea</p> <p><b>Properties</b> Nillable</p> <p><b>Description</b> The name of the process group for the batch process job definition.</p>
ProcessGroup	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The team or group for which the definition processes records.</p>
SourceObjectName	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The API name of the object whose records are processed.</p>
Type	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The type of process for which the Batch Management job processes records. Possible values are:</p> <ul style="list-style-type: none"> <li>Flow</li> <li>LoyaltyProgramProcess</li> </ul> <p>This field is available in API version 55.0 and later.</p>

Field	Details
TypeInstance	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The API name of the process that's processed by the Batch Job definition.</p>

## Batch Management Metadata API


Use a Metadata API to create, update, and activate Batch Management jobs.

### [BatchProcessJobDefinition](#)

Represents the details of a Batch Management job definition. This type extends the Metadata metadata type and inherits its `fullName` field.

### BatchProcessJobDefinition

Represents the details of a Batch Management job definition. 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.

### EDITIONS

Available in: Lightning Experience

Available in: Batch Management is available with Enterprise, Unlimited, and Performance Editions with the Loyalty Management, Manufacturing Cloud, Rebate Management, or Accounting Subledger

### File Suffix and Directory Location

BatchProcessJobDefinition components have the suffix `.batchProcessJobDefinition` and are stored in the `batchProcessJobDefinitions` folder.

### Version


BatchProcessJobDefinition 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. The Loyalty Program Process type is only available in orgs that have Loyalty Management enabled.

### Fields

Field Name	Field Type	Description
<code>batchSize</code>	integer	Required. Number of records that each Batch Management job can process. Flow type Batch Management jobs can process up to 2000

Field Name	Field Type	Description
		records and Loyalty Program Process type Batch Management jobs can process up to 250 records.
dataSource	<a href="#">BatchDataSource</a> on page 706[]	Required. Source of information whose records must be processed by the Batch Management job.
description	string	Description of the Batch Management job, up to 255 characters.
executionProcessApiName	string	<p>API name of process that must be executed by the Batch Management job. This field is available in API version 55.0 and later.</p> <ul style="list-style-type: none"> <li>• If the batch job's type is Flow, enter the API name of an active flow that the batch job must execute.</li> <li>• If the batch job's type is Loyalty Program Process, enter: <ul style="list-style-type: none"> <li>– Transaction_Journals if you want the batch job to process Transaction Journal records by applying the applicable active loyalty program process of the type TransactionJournal.</li> <li>– API name of an active loyalty process of the type TierProcessing if you want the batch job to run the loyalty program process to assess the tier of eligible members. The API name consists of the name of the process, the process type, and the name of the loyalty program separated by two consecutive underscores. For example, the process API name is <code>Update Member Tier__TierProcessing__Inner Circle</code> if the process name is Update Member Tier, the process type is TierProcessing, and the loyalty program name is Inner Circle.</li> </ul> </li> </ul> <p>You can use database-based APEX classes that let you use flex queues in the Batch Management job, allowing to place more than 5 jobs in a queue. This functionality is applicable to all Industry Clouds that use managed packages. See <a href="#">Apex Flex Queue</a>.</p>
flowApiName	string	<p>API name of an active flow process that must be executed by the Batch Management job.</p> <p> <b>Note:</b> You can either specify the flow API name in the <code>executionProcessApiName</code> field or in the <code>flowApiName</code> field.</p>
flowInputVariable	string	Input variable of associated flow that is used by the batch job to uniquely identify records.
masterLabel	string	Required. Name of the Batch Management job, up to 80 characters.
processGroup	string	Required. Name of the group for which the Batch Management job processes records.
retryCount	integer	Required. Number of times this Batch Management job must be rerun in case it fails. The maximum retry count is 3. Valid values are 1–3.

Field Name	Field Type	Description
retryInterval	integer	Required. Number of milliseconds after which the Batch Management job must be rerun in case it fails. Valid values are 1,000–10,000.
status	string	Indicates the status of the Batch Management job. Valid values are <code>Active</code> and <code>Inactive</code> .
type	string (enumeration of type string)	The type of process that the Batch Management job must execute. This field is available in API version 55.0 and later. Valid values are: <ul style="list-style-type: none"> <li>• <code>Flow</code></li> <li>• <code>Loyalty Program Process</code></li> </ul>

## BatchDataSource

Represents the source of information whose records must be processed by the Batch Management job.

### Fields

Field Name	Field Type	Description
condition	string	Required. Criteria defined to filter the records.
criteria	string	Type of filter criteria that's used to filter records for processing.
filters	<a href="#">BatchDataSrcFilterCriteria</a> on page 706[]	Filter criterion that decides which records must be processed by the Batch Management job.
sourceObject	string	Required. API name of an object whose records must be processed by the batch job.  If the batch job type is <code>Loyalty Program Process</code> , the source object must be: <ul style="list-style-type: none"> <li>• <code>TransactionJournal</code> if the batch job is used to process transaction journals by applying the applicable loyalty program process.</li> <li>• An object that stores the details of loyalty program members whose tier must be assessed by the loyalty program process specified in the <code>executionProcessApiName</code> field.</li> </ul>
sourceObjectField	string	API name of the source object field that uniquely identifies records for which the batch job is executed. This field is available in API version 57.0 and later.  This field is only applicable when the batch job's type is <code>Loyalty Program Process</code> and a <code>TierProcess</code> type active loyalty program process is specified in the <code>executionProcessApiName</code> field. Specify the API name of a field that is a lookup to the <code>LoyaltyProgramMember</code> object and uniquely identifies the members whose tier must be assessed.

## BatchDataSrcFilterCriteria

Represents the filter conditions that decide which records must be processed by the Batch Management job.

## Fields

Field Name	Field Type	Description
dynamicValueType	string	Data type of the input variable used as a filter.
fieldName	string	Required. Name of the field that must be used to filter records.
fieldValue	string	Required. Value of the field that must be filtered. Specify the field if <code>isDynamicValue</code> is set to <code>False</code> .
isDynamicValue	boolean	Required. Indicates whether the filter criteria is dynamic.
operator	string (enumeration of type string)	Required. Operator that is specified in the filter criteria. Valid values are: <ul style="list-style-type: none"> <li>• equals</li> <li>• excludes</li> <li>• greaterThan</li> <li>• greaterThanOrEqualTo</li> <li>• in</li> <li>• includes</li> <li>• lessThan</li> <li>• LessThanOrEqualTo</li> <li>• GreaterOrEqual</li> <li>• like</li> <li>• notEquals</li> <li>• notIn</li> </ul>
sequenceNo	integer	Required. Sequence number used to refer the criteria in a filter.

## Declarative Metadata Sample Definition

The following is an example of a `BatchProcessJobDefinition` component.

```
<?xml version="1.0" encoding="UTF-8"?>
<BatchProcessJobDefinition xmlns="http://soap.sforce.com/2006/04/metadata">
  <batchSize>10</batchSize>
  <dataSource>
    <condition>1</condition>
    <criteria>all</criteria>
    <filters>
      <dynamicValue>>false</dynamicValue>
      <dynamicValueType>string</dynamicValueType>
      <fieldName>Name</fieldName>
      <fieldValue>abcd</fieldValue>
      <operator>equals</operator>
      <sequenceNo>1</sequenceNo>
    </filters>
    <sourceObject>Account</sourceObject>
  </dataSource>
</BatchProcessJobDefinition>
```

```

<flowApiName>Flow1</flowApiName>
<flowInputVariable>recordId</flowInputVariable>
<masterLabel>BatchJob1</masterLabel>
<processGroup>Loyalty</processGroup>
<retryCount>2</retryCount>
<retryInterval>1000</retryInterval>
<status>Inactive</status>
<description>test</description>
<type>Flow</type>
<executionProcessApiName>testFlow</executionProcessApiName>
</BatchProcessJobDefinition>

```

The following is an example of a Flow object used in Metadata API.

```

<?xml version="1.0" encoding="UTF-8"?>
<!--
  ~ Copyright 2020 Salesforce, Inc.
  ~ All Rights Reserved
  ~ Company Confidential
-->
<Flow xmlns="http://soap.sforce.com/2006/04/metadata">
  <apiVersion>51.0</apiVersion>
  <interviewLabel>Flow1 {!$Flow.CurrentDateTime}</interviewLabel>
  <label>Flow1</label>
  <processMetadataValues>
    <name>BuilderType</name>
    <value>
      <stringValue>LightningFlowBuilder</stringValue>
    </value>
  </processMetadataValues>
  <processMetadataValues>
    <name>OriginBuilderType</name>
    <value>
      <stringValue>LightningFlowBuilder</stringValue>
    </value>
  </processMetadataValues>
  <processType>AutoLaunchedFlow</processType>
  <recordLookups>
    <name>getAcc</name>
    <label>getAcc</label>
    <locationX>614</locationX>
    <locationY>465</locationY>
    <assignNullValuesIfNoRecordsFound>false</assignNullValuesIfNoRecordsFound>
    <filterLogic>and</filterLogic>
    <filters>
      <field>Id</field>
      <operator>EqualTo</operator>
      <value>
        <elementReference>recordId</elementReference>
      </value>
    </filters>
    <getFirstRecordOnly>true</getFirstRecordOnly>
    <object>Account</object>
    <storeOutputAutomatically>true</storeOutputAutomatically>
  </recordLookups>
</Flow>

```

```

</recordLookups>
<start>
  <locationX>73</locationX>
  <locationY>213</locationY>
  <connector>
    <targetReference>getAcc</targetReference>
  </connector>
</start>
<status>Draft</status>
<variables>
  <name>recordId</name>
  <dataType>String</dataType>
  <isCollection>>false</isCollection>
  <isInput>true</isInput>
  <isOutput>>false</isOutput>
</variables>
</Flow>

```

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>BatchProcessJobDefinition</name>
  </types>
  <types>
    <members>Flow1</members>
    <name>Flow</name>
  </types>
  <version>51.0</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](#).

## Batch Management Invocable Actions

Run an active Batch Management job definition. For more information on custom invocable actions, see [REST API Developer Guide](#) and [Actions Developer Guide](#).

### Batch Job Actions

Run an active Batch Management job definition. This action executes a defined Batch Management job asynchronously.

### Submit Failed Records Batch Job

Run to resubmit an existing batch job with failed records for processing. This action executes the batch job asynchronously.

## Batch Job Actions

Run an active Batch Management job definition. This action executes a defined Batch Management job asynchronously.

A Batch Management job processes a flow in manageable parts. For more information about running an active Batch Management jobs, see [Schedule a Batch Job](#) in Salesforce Help.

This object is available in API version 51.0 and later.

Supported REST HTTP Methods

URI

/services/data/v~~XX~~.X/actions/custom/batchJobAction

Formats

JSON

HTTP Methods

GET, POST

Authentication

Authorization: Bearer *token*

Inputs

The batch job action uses the batch job definition ID and input variables to execute the job and generate a batch job ID. The input values vary according to the input variables in that flow.

Outputs

Output	Details
batchJobId	<p><b>Type</b></p> <p>string</p> <p><b>Description</b></p> <p>ID of the batch job generated after the request is successful. This batch job ID is used to track the progress of the batch job in Monitor Workflow Services.</p>

Usage

JSON Sample Request

```
{
  "noOfEmployees" : 900,
  "accountIndustry" : "Technology"
}
```

JSON Sample Response

```
{
  "batchJobId": "01Mxx0000A000001EAA"
  "accepted": "true"
}
```

### Submit Failed Records Batch Job

Run to resubmit an existing batch job with failed records for processing. This action executes the batch job asynchronously. This object is available in API version 52.0 and later.

#### Supported REST HTTP Methods

**URI**

/services/data/v~~XX~~.X/actions/standard/submitFailedRecordsBatchJob

**Formats**

JSON

**HTTP Methods**

GET, POST

**Authentication**

Authorization: Bearer *token*

#### Inputs

Input	Details
failedRecordIds	<p><b>Type</b> array</p> <p><b>Description</b> The IDs of failed records in a batch job.</p>
parentBatchJobId	<p><b>Type</b> string</p> <p><b>Description</b> Required. The ID of a batch job with failed records.</p>

#### Outputs

Output	Details
batchJobId	<p><b>Type</b> string</p> <p><b>Description</b> The ID of a batch job generated after the request is successful. This batch job ID is used to track the progress of the batch job in Monitor Workflow Services in the org.</p>
status	<p><b>Type</b> string</p> <p><b>Description</b> Indicates whether a batch job succeeded or failed.</p>

## Usage

### JSON Sample Request

```
{
  "inputs": [{
    "parentBatchJobId": "0mdRM0000004DXrYAM",
    "failedRecordIds": [
      "001RM000005AG0bYAG", "001RM000005AERZYA4", "001RM000005AG0WYAW"
    ]
  }]
}
```

### JSON Sample Response

```
[ {
  "actionName" : "submitFailedRecordsBatchJob",
  "errors" : null,
  "isSuccess" : true,
  "outputValues" : {
    "batchJobId" : "0mdRM0000004DZ9YAM"
  }
} ]
```

## Monitor Workflow Services

The Monitor Workflow Services standard objects can be used to track the run of Data Processing Engine definitions and Batch Management jobs. During a run, you can view details about each part that the run is broken down into. After the run is complete, you can view its status and the records which weren't processed during the run.

The objects of Monitor Workflow Services aren't available in Object Manager of your Salesforce org.

#### [BatchJob](#)

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

#### [BatchJobPart](#)

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

#### [BatchJobPartFailedRecord](#)

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

### EDITIONS

Available in: Lightning Experience

Available in: Monitor Workflow Services is available with Enterprise, Unlimited, and Performance Editions where Data Processing Engine or Batch Management is available

## BatchJob

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

## Supported Calls

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

## Fields

Field	Details
BatchJobDefinitionId	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> The unique identifier of the associated batch job definition.  This is a relationship field.</p> <p><b>Relationship Name</b> BatchJobDefinition</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> BatchJobDefinition</p>
BatchJobDefinitionName	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> The developer name of the associated batch job definition.</p>
EndTime	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp when the batch job run was completed.</p>
ErrorDescription	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The error message in case the batch job run failed.</p>
ExternalReference	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p>

Field	Details
	<b>Description</b> The unique identifier of the process that's running or has run the batch job.
IsDebugOn	<b>Type</b> boolean <b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update <b>Description</b> The default value is <code>false</code> .
IsDebugRecipeDeleted	<b>Type</b> boolean <b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update <b>Description</b> The default value is <code>false</code> .
LastReferencedDate	<b>Type</b> dateTime <b>Properties</b> Filter, Nillable, Sort <b>Description</b> The timestamp for when the current user last viewed the batch job.
LastViewedDate	<b>Type</b> dateTime <b>Properties</b> Filter, Nillable, Sort <b>Description</b> The timestamp for when the current user last viewed this item.
Name	<b>Type</b> string <b>Properties</b> Filter, Group, idLookup, Sort <b>Description</b> The name of the batch job.
OwnerId	<b>Type</b> reference

Field	Details
	<p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> Unique identifier of the user who initiated the batch job run. This is a polymorphic relationship field.</p> <p><b>Relationship Name</b> Owner</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> Group, User</p>
ProcessGroup	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> The group or team for which the batch job is run.</p>
RetryCount	<p><b>Type</b> int</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The number of times the batch job run is automatically rerun in case it fails.</p>
RuntimeParameter	<p><b>Type</b> textarea</p> <p><b>Properties</b> Nillable</p> <p><b>Description</b> The values of the input variables that are used as filter criteria in a Batch Management job.</p>
StartTime	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp when the batch job run was started.</p>

Field	Details
Status	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Restricted picklist, Sort</p> <p><b>Description</b> The status of the batch job run. Possible values are:</p> <ul style="list-style-type: none"> <li>• Canceled</li> <li>• Completed</li> <li>• CompletedWithFailures</li> <li>• Failed</li> <li>• InProgress</li> <li>• Submitted</li> </ul>
Type	<p><b>Type</b> picklist</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Restricted picklist, Sort</p> <p><b>Description</b> The type of batch job that is run. Possible values are:</p> <ul style="list-style-type: none"> <li>• Calc—Data Processing Engine</li> <li>• DecisionTableRefresh</li> <li>• Flow</li> </ul>

## Associated Objects

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

### **BatchJobFeed** on page 1589

Feed tracking is available for the object.

### **BatchJobHistory** on page 1597

History is available for tracked fields of the object.

## BatchJobPart

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

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

## Supported Calls

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

## Fields

Field	Details
<code>BatchJobId</code>	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> The unique identifier of the associated batch job.  This is a relationship field.</p> <p><b>Relationship Name</b> BatchJob</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> BatchJob</p>
<code>EndTime</code>	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp when the batch job part was processed.</p>
<code>ErrorDescription</code>	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The error message in case the batch job part failed.</p>
<code>FailedRecordCount</code>	<p><b>Type</b> int</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The number of records that the batch job part couldn't process.</p>

Field	Details
FailedRecFile	<p><b>Type</b> FILE</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> The file containing failed records downloaded as CSV, JSON, or TXT formats during a Data Processing Engine definition's run by using CRM Analytics (CRMA) or Data Cloud runtime. Available in API version 63.0 and later.</p>
InputRecordCount	<p><b>Type</b> int</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The number of records that the batch job part must process.</p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, idLookup, Sort</p> <p><b>Description</b> The name of the batch job part.</p>
OutputRecordCount	<p><b>Type</b> int</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The number of records the batch job part has processed.</p>
ParentBatchJobPartId	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The unique identifier of the part batch job part associated with the batch job part. This is a relationship field.</p> <p><b>Relationship Name</b> ParentBatchJobPart</p> <p><b>Relationship Type</b> Lookup</p>

Field	Details
	<b>Refers To</b> BatchJobPart
RetryCount	<b>Type</b> int  <b>Properties</b> Filter, Group, Nillable, Sort  <b>Description</b> The number of times the batch job part is automatically rerun in case it fails.
StartTime	<b>Type</b> dateTime  <b>Properties</b> Filter, Nillable, Sort  <b>Description</b> The timestamp when the batch job part's run was started.
Status	<b>Type</b> picklist  <b>Properties</b> Defaulted on create, Filter, Group, Restricted picklist, Sort  <b>Description</b> The status of the batch job part. Possible values are: <ul style="list-style-type: none"> <li>• Canceled—Canceled</li> <li>• Completed</li> <li>• Failed</li> <li>• InProgress—In Progress</li> </ul>
Type	<b>Type</b> picklist  <b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort  <b>Description</b> The type of node in case the associated batch job is of the type Calc (Data Processing Engine). Possible values are: <ul style="list-style-type: none"> <li>• Aggregate</li> <li>• Append</li> <li>• Compute</li> <li>• Custom</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>• Datasync</li> <li>• Filter</li> <li>• Forecast</li> <li>• Hierarchy</li> <li>• Join</li> <li>• Slice</li> <li>• Source</li> <li>• Transform</li> <li>• Writeback</li> </ul>

## Associated Objects

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

### [BatchJobPartFeed](#) on page 1589

Feed tracking is available for the object.

### [BatchJobPartHistory](#) on page 1597

History is available for tracked fields of the object.

## BatchJobPartFailedRecord

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

## Supported Calls

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

## Fields

Field	Details
BatchJobId	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The unique identifier of the associated batch job. This is a relationship field.</p> <p><b>Relationship Name</b> BatchJob</p>

Field	Details
	<b>Relationship Type</b> Lookup <b>Refers To</b> BatchJob
BatchJobPartId	<b>Type</b> reference <b>Properties</b> Filter, Group, Sort <b>Description</b> The unique identifier of the associated batch job part. This is a relationship field. <b>Relationship Name</b> BatchJobPart <b>Relationship Type</b> Lookup <b>Refers To</b> BatchJobPart
ErrorDescription	<b>Type</b> string <b>Properties</b> Filter, Nillable, Sort <b>Description</b> The error message that indicates why the batch job part couldn't process the records.
Name	<b>Type</b> string <b>Properties</b> Filter, Group, idLookup, Sort <b>Description</b> The name of the batch job part failed record.
Record	<b>Type</b> string <b>Properties</b> Filter, Group, Nillable, Sort <b>Description</b> The unique identifier of the batch record that processed the failed records.

Field	Details
ResubmittedBatchJobId	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The batch job used to submit failed records. This object is available in API version 52.0 and later.  This is a relationship field.</p> <p><b>Relationship Name</b> ResubmittedBatchJob</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> BatchJob</p>
Status	<p><b>Type</b> picklist</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Specifies the status of the failed records. This object is available in API version 52.0 and later.  Possible values are:</p> <ul style="list-style-type: none"> <li>Failed</li> <li>Resubmitted</li> </ul> <p>The default value is 'Failed'.</p>

## Associated Objects

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

### [BatchJobPartFailedRecordFeed](#) on page 1589

Feed tracking is available for the object.

### [BatchJobPartFailedRecordHistory](#) on page 1597

History is available for tracked fields of the object.

## Digital Lending

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Digital Lending supports the end-to-end lending lifecycle across all retail loan products and channels in a unified lending platform. Create a loan application process that suits the needs of your clients, both self-service application intake and assisted application intake. Digital Lending harnesses the power of Financial Services Cloud and common Industry features to offer a platform that serves as both the point-of-sale and loan origination system.

### [REST Reference](#)

Use the Digital Lending Business APIs to give users a seamless API experience for creating and modifying loan applications.

### [Digital Lending Invocable Actions](#)

Use invocable actions supported with Digital Lending to create and manage contract documents.

### [Digital Lending Metadata API Types](#)

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

### [Digital Lending Apex Reference](#)

Use the built-in Apex class for Digital Lending.

## REST Reference

Use the Digital Lending Business APIs to give users a seamless API experience for creating and modifying loan applications.

### [Resources](#)

Digital Lending APIs include these resources.

### [Requests](#)

Digital Lending APIs include these request bodies.

### [Responses](#)

Digital Lending APIs include these response bodies.

## Resources

Digital Lending APIs include these resources.

### [Application Form](#)

Create application form with details.

### [Application Form Retrieve](#)

Retrieve an application form.

## Application Form

Create application form with details.

### Resource

```
/connect/industries/application-forms
```

**Resource example**

```
https://yourInstance.salesforce.com/services/data/v63.0/connect/industries/application-forms/
```

**Available version**

61.0

**HTTP methods**

POST

**Request body for POST****Properties**

Name	Type	Description	Required or Optional	Available Version
account	<a href="#">Application Form Account Input</a>	Application form account associated to the application form details.	Optional	61.0
applicants	<a href="#">Applicant Wrapper Input[]</a>	Applicants associated to the application form details.	Optional	61.0
applicationForm	<a href="#">Application Form Input</a>	Application form associated to the application form details.	Required	61.0
applicationFormProducts	<a href="#">Application Form Product Input[]</a>	Application form products associated to the application form details.	Optional	61.0

**Response body for POST**[Create Application Form](#)**Application Form Retrieve**

Retrieve an application form.

**Resource**

```
/connect/industries/application-forms/applicationFormId
```

**Resource example**

```
https://yourInstance.salesforce.com/services/data/v63.0/connect/industries/application-forms/13xSB0000000jpx2AA
```

**Available version**

61.0

**HTTP methods**

GET

**Response body for GET**[Get Application Form](#)**Requests**

igital Lending APIs include these request bodies.

[Address Input](#)

Input representation of an account address.

[Applicant Input](#)

Input representation of the applicant details.

[Applicant Wrapper Input](#)

Input representation of the details of the applicants associated to the application form.

[Application Form Account Input](#)

Input representation of the account related to the application form.

[Application Form Input](#)

Input representation of the application form.

[Application Form Product Input](#)

Input representation of the application form product.

[Application Form Seller Item Input](#)

Input representation of the application form seller item.

[Create Application Form Details Input](#)

Input representation of the request to create an application form with details.

[Create Application Form Input](#)

Input representation of the request to create an application form.

[Custom Fields Input](#)

Input representation of the digital lending record with custom fields.

[Party Expense Input](#)

Input representation of the party expense.

[Party Financial Asset Additional Owner Input](#)

Input representation of the details of the additional owner of the party financial asset.

[Party Financial Asset Input](#)

Input representation of the details of the party financial asset.

[Party Financial Asset Lien Input](#)

Input representation of the lien details of the party financial asset.

[Party Financial Liability Borrower Input](#)

Input representation of the borrower details of the party financial liability.

[Party Financial Liability Input](#)

Input representation of the details of the party financial liability.

[Party Identity Verification Input](#)

Input representation of the details of the party identity verification.

[Party Identity Verification Step Input](#)

Input representation of the details of the party identity verification step.

[Party Income Input](#)

Input representation of the details of the party income.

[Party Profile Address Input](#)

Input representation of the details of the party profile address.

[Party Profile Input](#)

Input representation of the details of the party profile.

[Party Profile Risk Input](#)

Input representation of the details of the party profile risk.

[Person Employment Input](#)

Input representation of the details of the person employment.

## Address Input

Input representation of an account address.

### Root XML tag

#### Properties

Name	Type	Description	Required or Optional	Available Version
city	String	City of the account.	Optional	61.0
country	String	Country of the account.	Optional	61.0
countryCode	String	Country code of the account.	Optional	61.0
latitude	Double	Latitude of the account.	Optional	61.0
longitude	Double	Longitude of the account.	Optional	61.0
postalCode	String	Postal code of the account.	Optional	61.0
state	String	State of the account.	Optional	61.0
stateCode	String	State code of the account.	Optional	61.0
street	String	Street address of the account.	Optional	61.0

## Applicant Input

Input representation of the applicant details.

#### Properties

Name	Type	Description	Required or Optional	Available Version
accountId	String	Account ID of the applicant.	Optional	61.0
birthDate	String	Birth date of the applicant.	Optional	61.0
contactId	String	Contact ID of the applicant.	Optional	61.0
currencyIsoCode	String	If multiple currencies are enabled, this field contains the currency ISO code associated with the record.	Optional	61.0

Name	Type	Description	Required or Optional	Available Version
customFields	<a href="#">Custom Fields Input[]</a>	Custom fields related to the applicant.	Optional	61.0
email	String	Email address of the applicant.	Optional	61.0
firstName	String	First name of the applicant.	Optional	61.0
groupExposure	Double	Sum of all loans that an applicant has with the financial institution that they are applying for a loan.	Optional	61.0
lastName	String	last name of the applicant.	Optional	61.0
middleName	String	Middle name of the applicant.	Optional	61.0
phone	String	Applicant's phone number.	Optional	61.0
phoneType	String	Type of phone number provided by the applicant.	Optional	61.0
recordTypeId	String	ID of the record type assigned to this object.	Optional	61.0
role	String	Role of the applicant.	Optional	61.0
salutation	String	Salutation of the applicant.	Optional	61.0
stage	String	Stage of the application for a product that's submitted by the applicant.	Optional	61.0
suffix	String	Suffix of the applicant.	Optional	61.0
uniqueReferenceNumber	String	Customer reference number of the applicant.	Optional	61.0

## Applicant Wrapper Input

Input representation of the details of the applicants associated to the application form.

### Properties

Name	Type	Description	Required or Optional	Available Version
applicant	<a href="#">Applicant Input</a>	Applicant associated to the applicant wrapper.	Optional	61.0
partyExpenseWrapper	<a href="#">Party Expense Input[]</a>	Party expense wrapper associated to the applicant wrapper.	Optional	61.0
partyFinancialAssetWrapper	<a href="#">Party Financial Asset Input[]</a>	Party financial asset wrapper associated to the applicant wrapper.	Optional	61.0

Name	Type	Description	Required or Optional	Available Version
partyFinancialLiabilityWrapper	<a href="#">Party Financial Liability Input[]</a>	Party financial liability wrapper associated to the applicant wrapper.	Optional	61.0
partyIncomeWrapper	<a href="#">Party Income Input[]</a>	Party income wrapper associated to the applicant wrapper.	Optional	61.0
partyProfile	<a href="#">Party Profile Input</a>	Party profile associated to the applicant wrapper.	Optional	61.0
personEmploymentWrapper	<a href="#">Person Employment Input[]</a>	Person employment wrapper associated to the applicant wrapper.	Optional	61.0

## Application Form Account Input

Input representation of the account related to the application form.

### Properties

Name	Type	Description	Required or Optional	Available Version
accountNumber	String	Account number assigned to the account.	Optional	61.0
accountSite	String	Name of the account's location.	Optional	61.0
accountSource	String	Source of the account record.	Optional	61.0
annualRevenue	Integer	Estimated annual revenue of the account.	Optional	61.0
billingAddress	<a href="#">Address Input</a>	Compound form of the billing address.	Optional	61.0
currencyIsoCode	String	Currency ISO code details.	Optional	61.0
customFields	<a href="#">Custom Fields Input[]</a>	Custom fields related to the application form account.	Optional	61.0
description	String	Text description of the account.	Optional	61.0
fax	String	Fax number for the account.	Optional	61.0
firstName	String	First name of the account.	Optional	61.0
industry	String	Industry associated with the account.	Optional	61.0
jigsaw	String	References the ID of a company in Data.com.	Optional	61.0
lastName	String	Last name of the account.	Required if Person Account is enabled.	61.0
middleName	String	Middle name of the account.	Optional	61.0
name	String	Name of the account.	Required	61.0

Name	Type	Description	Required or Optional	Available Version
numberOfEmployees	Integer	Number of employees working at the company represented by this account.	Optional	61.0
ownerId	String	ID of the user who currently owns this account.	Optional	61.0
ownership	String	Ownership type for the account.	Optional	61.0
parentId	String	ID of the parent object, if any.	Optional	61.0
personBirthDate	String	Birth date of the account.	Optional	61.0
personContactId	String	Contact ID of the account.	Optional	61.0
personEmail	String	Email address of the applicant.	Optional	61.0
personGenderIdentity	String	Gender identity of the account.	Optional	61.0
personHomePhone	String	Home phone number of the account.	Optional	61.0
personMailingAddress	<a href="#">Address Input</a>	Mailing address of the account.	Optional	61.0
personMobilePhone	String	Mobile phone number of the account.	Optional	61.0
personOtherAddress	<a href="#">Address Input</a>	Other address of the account.	Optional	61.0
personOtherPhone	String	Other phone number of the account.	Optional	61.0
phone	String	Phone number for the account.	Optional	61.0
rating	String	Account's prospect rating.	Optional	61.0
recordTypeId	String	ID of the record type assigned to the object.	Optional	61.0
salutation	String	Salutation of the account.	Optional	61.0
shippingAddress	<a href="#">Address Input</a>	Compound form of the shipping address.	Optional	61.0
sic	String	Standard Industrial Classification code of the company's main business categorization.	Optional	61.0
sicDesc	String	A brief description of the line of business, based on its SIC code.	Optional	61.0
suffix	String	Suffix of the account.	Optional	61.0
tickerSymbol	String	Stock market symbol for the account.	Optional	61.0

Name	Type	Description	Required or Optional	Available Version
type	String	Type of account.	Optional	61.0
website	String	Website of the account.	Optional	61.0

## Application Form Input

Input representation of the application form.

### Properties

Name	Type	Description	Required or Optional	Available Version
accountId	String	ID of the account.	Optional	61.0
branchUnitId	String	Branch unit that owns the application.	Optional	61.0
customFields	<a href="#">Custom Fields Input[]</a>	Custom fields related to the application form.	Optional	61.0
intakeChannelType	String	Channel type of the application form submission.	Optional	61.0
leadId	String	Lead that's associated with the application.	Optional	61.0
opportunityId	String	Opportunity that's associated with the application.	Optional	61.0
recordTypeId	String	ID of the record type assigned to this object.	Optional	61.0
stage	String	Stage of the application for a product that's submitted by the applicant.	Optional	61.0
thirdPartyLoanProviderAccountId	String	Third party loan provider account that's associated with the application.	Optional	61.0
tierType	String	Tier type of an application form, based on which the offer terms are evaluated.	Optional	61.0
totalDebtToIncomePercent	Double	Cumulative debt to income percentage for all applicants related to the application form.	Optional	61.0
totalIncomeToExpenseRatio	Double	Ratio of the applicant's debt to income, as an input for the Underwriter to decide the applicant's eligibility (India Lending).	Optional	61.0
totalLoanToValuePercent	Double	Cumulative loan to value percentage for all applicants related to the application form.	Optional	61.0

Name	Type	Description	Required or Optional	Available Version
usageType	String	Usage type of the application form.	Required	61.0

## Application Form Product Input

Input representation of the application form product.

### Properties

Name	Type	Description	Required or Optional	Available Version
applicant VisibleStatus	String	Status that specifies the visibility of the application form product record.	Optional	61.0
application FormSellerItem	<a href="#">Application Form Seller Item Input</a>	Application form seller item related to the application form product input.	Optional	61.0
currency IsoCode	String	If multiple currencies are enabled, this field contains the currency ISO code associated with the record.	Optional	59.0
customFields	<a href="#">Custom Fields Input[]</a>	Custom fields related to the application form product.	Optional	59.0
disbursement Method	String	Method of disbursement for the loan amount.	Optional	59.0
downPayment	Double	Value for the upfront partial payment amount that the applicant paid.	Optional	61.0
hasAutomatic Payment	Boolean	Indicates whether the applicant opted in for automatic payments ( <code>true</code> ) or not ( <code>false</code> ).	Optional	59.0
hasElectronic Statement	Boolean	Indicates whether the customer opted in for electronic statements ( <code>true</code> ) or not ( <code>false</code> ).	Optional	59.0
isAtmCard Required	Boolean	Indicates whether an ATM card is required ( <code>true</code> ) or not ( <code>false</code> ).	Optional	59.0
isCheckbook Required	Boolean	Indicates whether a checkbook is required ( <code>true</code> ) or not ( <code>false</code> ) for the application form product.		59.0
loanPurpose	String	Reason or purpose for the loan.	Optional	61.0
loanType	String	Type of loan being requested.	Optional	59.0
ownershipType	String	Type of ownership for the application form product.	Optional	61.0

Name	Type	Description	Required or Optional	Available Version
productId	String	Product associated with the application form product.	Optional	59.0
recordTypeId	String	ID of the record type assigned to this object.	Optional	59.0
requestedAmount	Double	Amount requested as part of the application.	Optional	59.0
requestedMonthlyPayment	Double	Monthly payment amount requested by an applicant.	Optional	61.0
requestedTerm	Integer	Length of the loan in months.	Optional	59.0
stage	String	Stage of the application form product that the applicant submitted.	Optional	61.0
totalBrandOwnedItemAmt	Double	Total value of the brand-owned seller items requested for financing.	Optional	61.0
totalVendorOwnedItemAmt	Double	Total value of the vendor-owned seller items requested for financing.	Optional	61.0

## Application Form Seller Item Input

Input representation of the application form seller item.

### Properties

Name	Type	Description	Required or Optional	Available Version
builtUpArea	Integer	Built-up area of the property.	Optional	61.0
builtUpAreaUnit	String	Unit of measure for the built up area.	Optional	61.0
constructionStage	String	Construction stage of the property.	Optional	61.0
currencyIsoCode	String	If multiple currencies are enabled, this field contains the currency ISO code associated with the record.	Optional	61.0
customFields	<a href="#">Custom Fields Input[]</a>	Custom fields related to the application form seller item.	Optional	61.0
engineNumber	String	Engine number of the vehicle.	Optional	61.0
intendedUse	String	Intention or purpose of use for a seller item related to an application form.	Optional	61.0

Name	Type	Description	Required or Optional	Available Version
itemCondition	String	Condition of a seller item related to an application form.	Optional	61.0
make	String	Make of the seller item.	Optional	61.0
mileage	Integer	Mileage of the seller item.	Optional	61.0
model	String	Model of the seller iteml.	Optional	61.0
partyFinancialAssetId	String	Details about the financial asset owned by an individual or account.	Optional	61.0
price	Double	Price of the product.	Optional	61.0
propertyAddress	<a href="#">Address Input</a>	Address of the property.	Optional	61.0
propertyAge	Double	Age of the property.	Optional	61.0
propertyUnitIdentifier	String	Unit identifier of the property.	Optional	61.0
recordTypeId	String	ID of the record type assigned to this object.	Optional	61.0
referenceObjectId	String	Product that the applicant has shown interest in buying. For example, a home or vehicle.	Optional	61.0
scheduledDeliveryDate	String	Delivery date of the product to the applicant.	Optional	61.0
sellerId	String	Account ID of the vendor who is selling the asset. This is also the beneficiary.	Optional	61.0
trim	String	Trim type of the seller item.	Optional	61.0
type	String	Type of product.	Optional	61.0
vehicleIdentificationNumber	String	Unique identifier for the vehicle.	Optional	61.0
vehicleRegistrationNumber	String	Registration number of the vehicle.	Optional	61.0
year	Integer	Manufacture date of the seller item.	Optional	61.0

## Create Application Form Details Input

Input representation of the request to create an application form with details.

**Properties**

Name	Type	Description	Required or Optional	Available Version
account	<a href="#">Application Form Account Input</a>	Application form account associated to the application form details.	Optional	61.0
applicants	<a href="#">Applicant Wrapper Input[]</a>	Applicants associated to the application form details.	Optional	61.0
applicationForm	<a href="#">Application Form Input</a>	Application form associated to the application form details.	Required	61.0
applicationFormProducts	<a href="#">Application Form Product Input[]</a>	Application form products associated to the application form details.	Optional	61.0

**Create Application Form Input**

Input representation of the request to create an application form.

**Properties**

Name	Type	Description	Required or Optional	Available Version
body	<a href="#">Create Application Form Details Input</a>	Application form details associated to the application form.	Required	61.0

**Custom Fields Input**

Input representation of the digital lending record with custom fields.

**Properties**

Name	Type	Description	Required or Optional	Available Version
name	String	Name of the custom field.	Required	61.0
value	Object	Value of the custom field.	Required	61.0

**Party Expense Input**

Input representation of the party expense.

**Properties**

<b>Name</b>	<b>Type</b>	<b>Description</b>	<b>Required or Optional</b>	<b>Available Version</b>
currencyIsoCode	String	If multiple currencies are enabled, this field contains the currency ISO code associated with the record.	Optional	61.0
customFields	<a href="#">Custom Fields Input[]</a>	Custom fields related to the party expense.	Optional	61.0
expenseAsOfDate	String	Date of the expense.	Optional	61.0
isReadOnly	Boolean	Indicates whether the party expense is read only ( <code>true</code> ) or not ( <code>false</code> ).	Optional	61.0
partyFinancialLiabilityId	String	ID of the party financial liability record.	Optional	61.0
recordTypeId	String	ID of the record type assigned to this object.	Optional	61.0
recurrenceInterval	String	Interval after which the expense is incurred.	Optional	61.0
relatedPerson	String	Indicates whether to associate the record to an Applicant or Party Profile record.	Required	61
totalAmount	Double	Total expense amount.	Required	61.0
type	String	Type of expense.	Required	61.0
usageType	String	Usage type of the party expense.	Required	61.0
verificationStatus	String	Indicates whether the party expense is verified ( <code>true</code> ) or not ( <code>false</code> ).	Optional	61.0

**Party Financial Asset Additional Owner Input**

Input representation of the details of the additional owner of the party financial asset.

**Properties**

<b>Name</b>	<b>Type</b>	<b>Description</b>	<b>Required or Optional</b>	<b>Available Version</b>
accountId	String	Account associated with the additional owner.	Optional	61.0
applicantId	String	Applicant associated with the additional owner of the financial asset.	Optional	61.0

Name	Type	Description	Required or Optional	Available Version
contactId	String	Contact associated with the additional owner.	Optional	61.0
currencyIsoCode	String	If multiple currencies are enabled, this field contains the currency ISO code associated with the record.	Optional	61.0
customFields	<a href="#">Custom Fields Input[]</a>	Custom fields related to the additional owner of the party financial asset.	Optional	61.0
ownershipSharePercent	Double	Percentage of the asset ownership between the primary and additional owner.	Optional	61.0
partyProfileId	String	Party profile associated with the additional owner of the financial asset.	Optional	61.0
recordTypeId	String	ID of the record type assigned to this object.	Optional	61.0
sourceSystemIdentifier	String	Unique identifier of the record in an external system.	Optional	61.0

## Party Financial Asset Input

Input representation of the details of the party financial asset.

### Properties

Name	Type	Description	Required or Optional	Available Version
currencyIsoCode	String	If multiple currencies are enabled, this field contains the currency ISO code associated with the record.	Optional	61.0
customFields	<a href="#">Custom Fields Input[]</a>	Custom fields related to the party financial asset.	Optional	61.0
description	String	Description of the party financial asset.	Optional	61.0
isLienExisting	Boolean	Indicates whether there is a lien on the financial asset ( <code>true</code> ) or not ( <code>false</code> ).	Optional	61.0
isReadOnly	Boolean	Indicates whether the party financial asset is read only ( <code>true</code> ) or not ( <code>false</code> ).	Optional	61.0
makeName	String	Make name of the asset.	Optional	61.0
modelName	String	Model name of the asset.	Optional	61.0
modelYear	String	Model year of the asset.	Optional	61.0

Name	Type	Description	Required or Optional	Available Version
ownershipPercent	Double	Share owned by the party in percentage.	Optional	61.0
ownershipStartDateTime	String	Date and time when the ownership of the asset starts.	Optional	61.0
ownershipType	String	Type of ownership for the asset.	Optional	61.0
partyFinancialAssetAdditionalOwner	<a href="#">Party Financial Asset Additional Owner Input[]</a>	Details of the additional owner associated to the party financial asset.	Optional	61.0
partyFinancialAssetLien	<a href="#">Party Financial Asset Lien[]</a>	Details of the lien associated to the party financial asset.	Optional	61.0
payoffDueAmount	Double	Amount due to pay off the asset.	Optional	61.0
pledgeAmount	Double	Amount the party pledges as collateral against a financial asset.	Optional	61.0
purchaseAmount	Double	Amount the party paid for the financial asset.	Optional	61.0
recordTypeId	String	ID of the record type assigned to this object.	Optional	61.0
relatedPerson	String	Indicates whether to associate the record to an Applicant or Party Profile record.	Required	61
serialNumber	String	Serial number of the asset.	Optional	61.0
sourceSystemIdentifier	String	Unique identifier of the asset in the external system.	Optional	61.0
type	String	Type of the asset.	Optional	61.0
usageType	String	Usage type of the asset.	Required	61.0
valuationAmount	Double	Worth of the asset after valuation.	Required	61.0
valuationDateTime	String	Date and time when the asset valuation was done.	Optional	61.0
verificationStatus	String	Verification status of the party financial asset.	Optional	61.0

## Party Financial Asset Lien Input

Input representation of the lien details of the party financial asset.

**Properties**

Name	Type	Description	Required or Optional	Available Version
currencyIsoCode	String	If multiple currencies are enabled, this field contains the currency ISO code associated with the record.	Optional	61.0
customFields	<a href="#">Custom Fields Input[]</a>	Custom fields related to the lien of the party financial asset.	Optional	61.0
isActive	Boolean	Indicates whether the lien is active ( <code>true</code> ) or not ( <code>false</code> ).	Optional	61.0
lienAmount	Double	Amount of the lien.	Optional	61.0
lienHolder	String	Name of the lien holder.	Optional	61.0
maturityDate	String	Maturity date of the lien.	Optional	61.0
recordTypeId	String	ID of the record type assigned to this object.	Optional	61.0

**Party Financial Liability Borrower Input**

Input representation of the borrower details of the party financial liability.

**Properties**

Name	Type	Description	Required or Optional	Available Version
accountId	String	Account ID associated with the borrower of the party financial liability.	Optional	61.0
applicantId	String	Applicant ID associated with the borrower of the party financial liability.	Optional	61.0
contactId	String	Contact ID associated with the borrower of the party financial liability.	Optional	61.0
customFields	<a href="#">Custom Fields Input[]</a>	Custom fields related to the borrower of the party financial liability.	Optional	61.0
partyProfileId	String	Party profile ID associated with the borrower of the party financial liability.	Optional	61.0
recordTypeId	String	ID of the record type assigned to this object.	Optional	61.0
sharePercent	Double	Percentage of the asset shared between the primary and additional owner.	Optional	61.0

Name	Type	Description	Required or Optional	Available Version
sourceSystem Identifier	String	Unique identifier of the borrower of the party financial liability in the external system.	Optional	61.0

## Party Financial Liability Input

Input representation of the details of the party financial liability.

### Properties

Name	Type	Description	Required or Optional	Available Version
applicantId	String	Applicant ID of the party financial liability.	Optional	61.0
currencyIsoCode	String	If multiple currencies are enabled, this field contains the currency ISO code associated with the record.	Optional	61.0
customFields	<a href="#">Custom Fields Input[]</a>	Custom fields related to the party financial liability.	Optional	61.0
estimated MonthlyPayment	Double	Estimated monthly payment.	Optional	61.0
interestRate	Double	Interest rate for the product.	Optional	61.0
isReadOnly	Boolean	Indicates whether the party financial liability is read only ( <code>true</code> ) or not ( <code>false</code> ).	Optional	61.0
isRepayment Active	Boolean	Indicates whether the party financial liability is being paid ( <code>true</code> ) or not ( <code>false</code> ).	Optional	61.0
lender	String	Branch unit that owns the party financial liability.	Optional	61.0
liabilityAccount Identifier	String	Unique identifier of the liability account.	Optional	61.0
outstanding Balance	Double	Remaining amount of the liability that the party owes.	Optional	61.0
partyFinancial LiabilityBorrower	<a href="#">Party Financial Liability Borrower Input[]</a>	Details of the borrower associated with the party financial liability.	Optional	61.0
recordTypeId	String	ID of the record type assigned to this object.	Optional	61.0

Name	Type	Description	Required or Optional	Available Version
relatedPerson	String	Indicates whether to associate the record to an Applicant or Party Profile record.	Required	61
sharePercent	Double	Percentage of the asset shared between the primary and additional owner.	Optional	61.0
shareType	String	Share type of the liability.	Optional	61.0
sourceSystem Identifier	String	Unique identifier of the record in an external system.	Optional	61.0
startDate	String	Start date of the party financial liability.	Optional	61.0
status	String	Status of the party financial liability.	Optional	61.0
term	String	Term of the party financial liability.	Optional	61.0
type	String	Type of the party financial liability.	Optional	61.0
usageType	String	Usage type of the party financial liability.	Required	61.0
verification Status	String	Verification status of the party financial liability.	Optional	61.0

## Party Identity Verification Input

Input representation of the details of the party identity verification.

### Properties

Name	Type	Description	Required or Optional	Available Version
customFields	<a href="#">Custom Fields Input[]</a>	Custom fields related to the party identity verification.	Optional	61.0
isResult Overridden	Boolean	Indicates whether the party identity verification result was overridden ( <code>true</code> ) or not ( <code>false</code> ).	Optional	61.0
name	String	Name of the party identity verification record.	Required	61.0
overriddenById	String	Record of the user who's responsible for overriding the party identity verification result.	Optional	61.0
overridden Result	String	Overridden result for a party after the party identity verification is complete.	Optional	61.0
partyIdentity Verification Step	<a href="#">Identity Verification Step Input[]</a>	Party identity verification step associated to the party identify verification.	Optional	61.0

Name	Type	Description	Required or Optional	Available Version
recordTypeId	String	ID of the record type assigned to this object.	Optional	61.0
reportUrl	String	URL of the report provided by the third-party identity verification agency.	Optional	61.0
requestCompletionDate	String	Date when the party identity verification request was completed.	Optional	61.0
result	String	Result of the party identity verification.	Optional	61.0
resultOverrideComment	String	Description about the party identity verification.	Optional	61.0
resultOverrideReason	String	Reason for overriding the party identity verification request.	Optional	61.0
status	String	Status of the party identity verification request.	Optional	61.0
thirdPartyVerfProcIdentifier	String	ID of verification run in the third-party verification system.	Optional	61.0
thirdPartyVerfIdentifier	String	ID of the identity verification record in the third-party identity verification system.	Optional	61.0
thirdPartyVerificationRunUrl	String	Third-party URL to view details of the verification run on the party profile.	Optional	61.0
verificationRequestDate	String	Date when the party identity verification request was submitted.	Optional	61.0
verifiedBy	String	Name of the third-party that conducted the identity verification.	Optional	61.0

## Party Identity Verification Step Input

Input representation of the details of the party identity verification step.

### Properties

Name	Type	Description	Required or Optional	Available Version
customFields	<a href="#">Custom Fields Input[]</a>	Custom fields related to the party identity verification step.	Optional	61.0
identityVerificationArtifactId	String	Artifact submitted for identity verification.	Optional	61.0

Name	Type	Description	Required or Optional	Available Version
name	String	Name of the party profile verification step record.	Required	61.0
recordTypeId	String	ID of the record type assigned to this object.	Optional	61.0
reportUrl	String	URL of the report provided by the third-party identity verification agency.	Optional	61.0
status	String	Status of the third-party identity verification.	Required	61.0
type	String	Type of the third-party identity verification.	Required	61.0
verification Decision	String	Decision taken after the third-party identity verification is completed.	Optional	61.0

## Party Income Input

Input representation of the details of the party income.

### Properties

Name	Type	Description	Required or Optional	Available Version
currencyIsoCode	String	If multiple currencies are enabled, this field contains the currency ISO code associated with the record.	Optional	61.0
customFields	<a href="#">Custom Fields Input[]</a>	Custom fields related to the party income.	Optional	61.0
incomeAmount	Double	Amount of the party income.	Required	60.0
incomeAsOfDate	String	Timestamp for when the income was last retrieved from an external data source.	Optional	61.0
incomeFrequency	String	Frequency of the party's income.	Optional	61.0
incomeSourceId	String	Source of the party's income.	Optional	61.0
incomeType	String	Type of income such as salary, commissions, and rentals.	Required	60.0
isReadOnly	Boolean	Indicates whether the party income is read only ( <code>true</code> ) or not ( <code>false</code> ).	Optional	61.0
recordTypeId	String	ID of the record type assigned to this object.	Optional	61.0
relatedPerson	String	Indicates whether to associate the record to an Applicant or Party Profile record.	Required	61

Name	Type	Description	Required or Optional	Available Version
usageType	String	Usage type of the party income.	Required	61.0
verificationStatus	String	Status of the information verification.	Optional	61.0

## Party Profile Address Input

Input representation of the details of the party profile address.

### Properties

Name	Type	Description	Required or Optional	Available Version
addressType	String	Type of party address.	Optional	61.0
city	String	City detail for the address.	Optional	61.0
country	String	Country detail for the address.	Optional	61.0
countryCode	String	Country code for the address.	Optional	61.0
customFields	<a href="#">Custom Fields Input[]</a>	Custom fields related to the party profile address.	Optional	61.0
geocodeAccuracy	String	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.	Optional	61.0
isPrimaryAddress	Boolean	Indicates whether the party's address is the primary address ( <code>true</code> ) or not ( <code>false</code> ).	Optional	61.0
latitude	Double	Used with <code>longitude</code> property to specify the precise geolocation of the address.	Optional	61.0
longitude	Double	Used with <code>latitude</code> property to specify the precise geolocation of the address.	Optional	61.0
name	String	Name of the party profile address record.	Required	61.0
postalCode	String	Postal code for the address.	Optional	61.0
recordTypeId	String	ID of the record type assigned to this object.	Optional	61.0
state	String	State detail for the address.	Optional	61.0
stateCode	String	State code for the address.	Optional	61.0

Name	Type	Description	Required or Optional	Available Version
street	String	Street detail for the address.	Optional	61.0
validityEnd Date	String	Date when the party profile address becomes valid.	Optional	61.0
validityStart Date	String	Date until when the party profile address is valid.	Optional	61.0

## Party Profile Input

Input representation of the details of the party profile.

### Properties

Name	Type	Description	Required or Optional	Available Version
accountId	String	Account ID associated with the party profile.	Optional	61.0
contactId	String	Contact ID associated with the party profile.	Optional	61.0
countryOfBirth	String	Country of birth in the party profile.	Optional	61.0
countryOf Domicile	String	Country of domicile in the party profile.	Optional	61.0
creditScore	Double	Credit score of the party.	Optional	61.0
creditScore Provider	String	Name of the agency that provides the credit score of the party.	Optional	61.0
customFields	<a href="#">Custom Fields Input[]</a>	Custom fields related to the party profile.	Optional	61.0
dateOfBirth	String	Date of birth of the party profile.	Optional	61.0
employment Industry	String	Employment industry of the party specified in the profile.	Optional	61.0
employmentType	String	Type of employment held by the party.	Optional	61.0
firstName	String	First name of the party in the profile.	Optional	61.0
fullName	String	Full name of the party profile.	Optional	61.0
fundSource	String	Source of funds for a party in the profile.	Optional	61.0
gender	String	Gender of the party in the profile.	Optional	61.0
household AccountId	String	Household account that's associated with the party profile.	Optional	61.0

Name	Type	Description	Required or Optional	Available Version
isNetWorthHigh	Boolean	Indicates whether the customer has a high net worth ( <code>true</code> ) or not ( <code>false</code> ).	Optional	61.0
isOffBoarded	Boolean	Indicates whether the party profile was off-boarded ( <code>true</code> ) or not ( <code>false</code> ).	Optional	61.0
lastName	String	Last name of the party in the profile.	Optional	61.0
lastProfileReviewDate	String	Date when the party profile was last reviewed.	Optional	61.0
leadId	String	Lead that's associated with the party profile.	Optional	61.0
middleName	String	Middle name of the party in the profile.	Optional	61.0
name	String	Name of the party profile record.	Required	61.0
nationality	String	Nationalities held by the party profile.	Optional	61.0
nextProfileReviewDate	String	Date of the next party profile review.	Optional	61.0
offBoardingComments	String	Date of the next party profile review.	Optional	61.0
offBoardingReason	String	Reason the party profile was off-boarded.	Optional	61.0
orchestrationErrorMessage	String	Message that's generated when an error occurs during the orchestration.	Optional	61.0
orchestrationId	String	ID of the run-time orchestration.	Optional	61.0
orchestrationStatus	String	Status of the orchestration.	Optional	61.0
partyIdentityVerification	<a href="#">Party Identity Verification Input[]</a>	Party identity verification associated with the party profile.	Optional	61.0
partyProfileAddress	<a href="#">Party Profile Address Input[]</a>	Party profile address associated with the party profile.	Optional	61.0
partyProfileRisk	<a href="#">Party Profile Risk Input[]</a>	Party profile risk associated with the party profile.	Optional	61.0
prefix	String	Prefix used by the party.	Optional	61.0
primaryEmail	String	Primary email address of the party that's specified in the profile.	Optional	61.0
primaryIdentificationName	String	Name of the primary identification document specified in the profile.	Optional	61.0

Name	Type	Description	Required or Optional	Available Version
primaryIdentifier	String	Unique identifier for the party.	Optional	61.0
primaryIdentifierType	String	Type of primary identification document defined in the profile.	Optional	61.0
primaryPhone	String	Primary phone number of the party that's specified in the profile.	Optional	61.0
recordTypeId	String	ID of the record type assigned to this object.	Optional	61.0
relatedPartyProfileId	String	Party profile record associated with this record.	Optional	61.0
residentType	String	Type of party residency in the profile.	Optional	61.0
reviewDecision	String	Decision taken after the party profile review is complete.	Optional	61.0
stage	String	Current stage of the party profile.	Optional	61.0
suffix	String	Suffix used by the party.	Optional	61.0
surnameAtBirth	String	Party surname at birth specified in the profile.	Optional	61.0
taxPayerIdentificationNumber	String	Taxpayer identifier that's used for tax purposes.	Optional	61.0
taxPayerIdentificationType	String	Type of taxpayer identification used for tax purposes.	Optional	61.0

## Party Profile Risk Input

Input representation of the details of the party profile risk.

### Properties

Name	Type	Description	Required or Optional	Available Version
customFields	<a href="#">Custom Fields Input[]</a>	Custom fields related to the party profile risk.	Optional	61.0
isRiskOverridden	Boolean	Indicates whether the risk assessment result of the party was overridden ( <code>true</code> ) or not ( <code>false</code> ).	Optional	61.0
name	String	Name of the party profile risk record.	Required	61.0

Name	Type	Description	Required or Optional	Available Version
overridden RiskCategory	String	Risk category that's overridden for a party after the assessment is complete.	Optional	61.0
recordTypeId	String	ID of the record type assigned to this object.	Optional	61.0
riskCategory	String	Risk category that's assigned to a party profile after the assessment is complete.	Optional	61.0
riskOverridden ById	String	User who overrode the risk assessment result of the party.	Optional	61.0
riskOverride Reason	String	Reason for overriding the risk assessment result.	Optional	61.0
type	String	Type of risk assessment.	Optional	61.0

## Person Employment Input

Input representation of the details of the person employment.

### Properties

Name	Type	Description	Required or Optional	Available Version
currencyIso Code	String	If multiple currencies are enabled, this field contains the currency ISO code associated with the record.	Optional	61.0
customFields	<a href="#">Custom Fields Input[]</a>	Custom fields related to the person employment.	Optional	61.0
employer Address	<a href="#">Address Input</a>	Employer's address.	Optional	61.0
employerPhone	String	Phone number of the employer.	Optional	61.0
employment Status	String	Employment status of the applicant.	Optional	61.0
employment Type	String	Employment type for the party.	Optional	61.0
endDate	String	Last date of employment at this job.	Optional	61.0
hourlyWage	Double	Hourly wage for the party.	Optional	61.0
name	String	Name for the record.	Optional	61.0
occupation	String	Person's occupation.	Required	61.0
position	String	Last position of the person at this job.	Optional	61.0

Name	Type	Description	Required or Optional	Available Version
recordTypeId	String	ID of the record type assigned to this object.	Optional	61.0
relatedPerson	String	Indicates whether to associate the record to an Applicant or Party Profile record.	Required	61
startDate	String	Start date of employment at this job.	Optional	61.0
weeklyHourCount	Integer	Number of hours per week that the party works for the employer.	Optional	61.0
workerType	String	Worker type for the party that's employed.	Optional	61.0

## Responses

Digital Lending APIs include these response bodies.

### [Address Result](#)

Output representation of the address result.

### [Applicant Result](#)

Output representation of the applicant result.

### [Applicant Wrapper Result](#)

Output representation of the applicant wrapper result.

### [Application Form Product Result](#)

Output representation of the application form product result.

### [Application Form Product Wrap Result](#)

Output representation of the application form product wrapper.

### [Application Form Result](#)

Output representation of the application form result.

### [Application Form Seller Item Result](#)

Output representation of the application form seller item result.

### [Create Application Form Party Financial Asset](#)

Output representation of the request to create the party financial asset.

### [Create Application Form Party Financial Liability](#)

Output representation of the request to create the party financial liability.

### [Create Application Form Party Identity Verification](#)

Output representation of the request to create the application form party identity verification.

### [Create Application Form Applicant](#)

Output representation of the request to create the application form applicant.

### [Create Application Form](#)

Output representation of the result with the created application form record.

[Create Application Form Product](#)

Output representation of the application form product.

[Create Application Form Result](#)

Output representation of the created application form record.

[Custom Fields Result](#)

Output representation of the digital lending record with custom fields.

[Get Application Form](#)

Output representation of the request to get the application form details.

[Get Application Form Result](#)

Output representation of the result from the get application form request.

[Party Credit Profile Result](#)

Output representation of the request to create the party credit profile.

[Party Expense Result](#)

Output representation of the party expense result.

[Party Financial Asset Additional Owner Result](#)

Output representation of the details of the additional owner of the party financial asset.

[Party Financial Asset Lien Result](#)

Output representation of the lien details of the party financial asset .

[Party Financial Asset Result](#)

Output representation of the party financial asset result.

[Party Financial Liability Borrower Result](#)

Output representation of the borrower details of the party financial liability.

[Party Financial Liability Result](#)

Output representation of the party financial liability result.

[Party Identity Verification Result](#)

Output representation of the party identity verification result.

[Party Identity Verification Step Result](#)

Output representation of the party identity verification step result.

[Party Income Result](#)

Output representation of the party income result.

[Party Profile Address Result](#)

Output representation of the party profile address result.

[Party Profile Result](#)

Output representation of the party profile result.

[Party Profile Risk Result](#)

Output representation of the party profile risk result.

[Person Employment Result](#)

Output representation of the person employment result.

## Address Result

Output representation of the address result.

Property Name	Type	Description	Filter Group and Version	Available Version
city	String	City detail for the address.	Small, 61.0	61.0
country	String	Country detail for the address.	Small, 61.0	61.0
countryCode	String	Country code for the address.	Small, 61.0	61.0
latitude	Double	Used with longitude property to specify the precise geolocation of the address.	Small, 61.0	61.0
longitude	Double	Used with latitude property to specify the precise geolocation of the address.	Small, 61.0	61.0
postalCode	String	Postal code for the address.	Small, 61.0	61.0
state	String	State detail for the address.	Small, 61.0	61.0
stateCode	String	State code for the address.	Small, 61.0	61.0
street	String	Street detail for the address.	Small, 61.0	61.0

## Applicant Result

Output representation of the applicant result.

Property Name	Type	Description	Filter Group and Version	Available Version
accountId	String	Account ID of the applicant.	Small, 61.0	61.0
birthDate	String	Birth date of the applicant.	Small, 61.0	61.0
contactId	String	Contact ID of the applicant.	Small, 61.0	61.0
createdById	String	ID of the user who created the applicant.	Small, 61.0	61.0
createdDate	String	Created date of the applicant detail.	Small, 61.0	61.0
currencyIsoCode	String	If multiple currencies are enabled, this field contains the currency ISO code associated with the record.	Small, 61.0	61.0
customFields	<a href="#">Custom Fields Result[]</a>	Custom fields related to the applicant.	Small, 61.0	61.0
email	String	Email address of the applicant.	Small, 61.0	61.0
firstName	String	First name of the applicant.	Small, 61.0	61.0

Property Name	Type	Description	Filter Group and Version	Available Version
groupExposure	Double	Sum of all loans that an applicant has with the financial institution that they are applying for a loan.	Small, 61.0	61.0
id	String	ID of the applicant.	Small, 61.0	61.0
lastModifiedById	String	Unique identifier of the user who modified the record.	Small, 61.0	61.0
lastModifiedDate	String	Date when the record was last modified.	Small, 61.0	61.0
lastName	String	Last name of the applicant.	Small, 61.0	61.0
middleName	String	Middle name of the applicant.	Small, 61.0	61.0
name	String	Unique number that represents the applicant.	Small, 61.0	61.0
ownerId	String	ID of the user who owns this record.	Small, 61.0	61.0
partyProfileId	String	Party profile ID of the applicant.	Small, 61.0	61.0
phone	String	Applicant's phone number.	Small, 61.0	61.0
phoneType	String	Type of phone number provided by the applicant.	Small, 61.0	61.0
recordTypeId	String	ID of the record type assigned to this object.	Small, 61.0	61.0
role	String	Role of the applicant.	Small, 61.0	61.0
salutation	String	Salutation of the applicant.	Small, 61.0	61.0
stage	String	Stage of the application for a product that is submitted by the applicant.	Small, 61.0	61.0
suffix	String	Suffix of the applicant.	Small, 61.0	61.0
uniqueReferenceNumber	String	Customer reference number of the applicant.	Small, 61.0	61.0

## Applicant Wrapper Result

Output representation of the applicant wrapper result.

Property Name	Type	Description	Filter Group and Version	Available Version
applicant	<a href="#">Applicant Result</a>	Applicant associated to the applicant wrapper.	Small, 61.0	61.0

Property Name	Type	Description	Filter Group and Version	Available Version
partyCreditProfile	<a href="#">Party Credit Profile Result[]</a>	Party credit profile associated to the applicant wrapper.	Small, 61.0	61.0
partyExpense	<a href="#">Party Expense Result[]</a>	Party expense associated to the applicant wrapper.	Small, 61.0	61.0
partyFinancialAsset	<a href="#">Party Financial Asset Result[]</a>	The party financial asset wrapper associated to the applicant wrapper.	Small, 61.0	61.0
partyFinancialLiability	<a href="#">Party Financial Liability Result[]</a>	Party financial liability wrapper associated to the applicant wrapper.	Small, 61.0	61.0
partyIncome	<a href="#">Party Income Result[]</a>	Party income wrapper associated to the applicant wrapper.	Small, 61.0	61.0
partyProfile	<a href="#">Party Profile Result</a>	Party profile associated to the applicant wrapper.	Small, 61.0	61.0
personEmployment	<a href="#">Person Employment Result[]</a>	Person employment wrapper associated to the applicant wrapper.	Small, 61.0	61.0

## Application Form Product Result

Output representation of the application form product result.

Property Name	Type	Description	Filter Group and Version	Available Version
applicantVisibleStatus	String	Status that specifies the visibility of the application form product record.	Small, 61.0	61.0
createdById	String	ID of the user who created the record.	Small, 61.0	61.0
createdDate	String	Date the record was created.	Small, 61.0	61.0
currencyIsoCode	String	If multiple currencies are enabled, this field contains the currency ISO code associated with the record.	Small, 61.0	61.0
customFields	<a href="#">Custom Fields Result[]</a>	Custom fields related to the application form product.	Small, 61.0	61.0
disbursementMethod	String	Method of disbursement for the loan amount.	Small, 61.0	61.0
downPayment	Double	Value for the upfront partial payment amount that the applicant paid.	Small, 61.0	61.0
hasAutomaticPayment	Boolean	Indicates whether the applicant opted in for automatic payments ( <code>true</code> ) or not ( <code>false</code> ).	Small, 61.0	61.0

Property Name	Type	Description	Filter Group and Version	Available Version
hasElectronicStatement	Boolean	Indicates whether the customer opted in for electronic statements ( <code>true</code> ) or not ( <code>false</code> ).	Small, 61.0	61.0
id	String	Unique identifier of the application form product.	Small, 61.0	61.0
isAtmCardRequired	Boolean	Indicates whether an ATM card is required ( <code>true</code> ) or not ( <code>false</code> ).	Small, 61.0	61.0
isCheckbookRequired	Boolean	Indicates whether a checkbook is required ( <code>true</code> ) or not ( <code>false</code> ) for the application form product.	Small, 61.0	61.0
lastModifiedById	String	ID of the user who last modified this record.	Small, 61.0	61.0
lastModifiedDate	String	Date and time when a user last modified this record.	Small, 61.0	61.0
loanPurpose	String	Reason or purpose for the loan.	Small, 61.0	61.0
loanType	String	Type of loan being requested.	Small, 61.0	61.0
name	String	Name of the application form product record.	Small, 61.0	61.0
ownerId	String	ID of the user who owns this record.	Small, 61.0	61.0
ownershipType	String	Type of ownership for the application form product.	Small, 61.0	61.0
productId	String	Product associated with the application form product.	Small, 61.0	61.0
recordTypeId	String	ID of the record type assigned to this object.	Small, 61.0	61.0
requestedAmount	Double	Amount requested as part of the application.	Small, 61.0	61.0
requestedMonthlyPayment	Double	Monthly payment amount requested by an applicant.	Small, 61.0	61.0
requestedTerm	Integer	Length of the loan in months.	Small, 61.0	61.0
stage	String	Stage of the application form product that the applicant submitted.	Small, 61.0	61.0
totalBrandOwnedItemAmt	Double	Total value of the brand-owned seller items requested for financing.	Small, 61.0	61.0
totalVendorOwnedItemAmt	Double	Total value of vendor-owned seller items requested for financing.	Small, 61.0	61.0

## Application Form Product Wrap Result

Output representation of the application form product wrapper.

Property Name	Type	Description	Filter Group and Version	Available Version
applicationFormProduct	<a href="#">Application Form Product Result</a>	Application form product related to the application form product wrapper result.	Small, 61.0	61.0
applicationFormSellerItem	<a href="#">Application Form Seller Item Result</a>	Application form seller item related to the application form product wrapper result.	Small, 61.0	61.0

## Application Form Result

Output representation of the application form result.

Property Name	Type	Description	Filter Group and Version	Available Version
accountId	String	ID of the account.	Small, 61.0	61.0
branchUnitId	String	Branch unit that owns the application.	Small, 61.0	61.0
createdById	String	ID of the user who created the record.	Small, 61.0	61.0
createdDate	String	Date the record was created.	Small, 61.0	61.0
customFields	<a href="#">Custom Fields Result[]</a>	Custom fields related to the application form.	Small, 61.0	61.0
id	String	Unique identifier of the application form.	Small, 61.0	61.0
intakeChannelType	String	Type of channel through which the application form is received.	Small, 61.0	61.0
lastModifiedById	String	ID of the user who last modified this record.	Small, 61.0	61.0
lastModifiedDate	String	Date and time when a user last modified this record.	Small, 61.0	61.0
leadId	String	Lead that's associated with the application.	Small, 61.0	61.0
name	String	Name of the application form.	Small, 61.0	61.0
opportunityId	String	Opportunity that's associated with the application.	Small, 61.0	61.0
ownerId	String	ID of the user who owns this record.	Small, 61.0	61.0
recordTypeId	String	ID of the record type assigned to this object.	Small, 61.0	61.0
stage	String	Stage of the application form product that the applicant submitted.	Small, 61.0	61.0

Property Name	Type	Description	Filter Group and Version	Available Version
thirdPartyLoanProviderAccountId	String	Third-party loan provider account that's associated with the application.	Small, 61.0	61.0
tierType	String	Tier type of an application form, based on which the offer terms are evaluated.	Small, 61.0	61.0
totalDebtToIncomePercent	Double	Cumulative debt to income percentage for all applicants related to the application form.	Small, 61.0	61.0
totalIncomeToExpenseRatio	Double	Cumulative income to expense ratio for all applicants related to the application form.	Small, 61.0	61.0
totalLoanToValuePercent	Double	Cumulative loan to value percentage for all applicants related to the application form.	Small, 61.0	61.0
usageType	String	Usage type of the application form.	Small, 61.0	61.0

## Application Form Seller Item Result

Output representation of the application form seller item result.

Property Name	Type	Description	Filter Group and Version	Available Version
builtUpArea	Integer	Built-up area of the property.	Small, 61.0	61.0
builtUpAreaUnit	String	Unit of measure for the built up area.	Small, 61.0	61.0
constructionStage	String	Construction stage of the property.	Small, 61.0	61.0
currencyIsoCode	String	If multiple currencies are enabled, this field contains the currency ISO code associated with the record.	Small, 61.0	61.0
customFields	<a href="#">Custom Fields Result[]</a>	Custom fields related to the application form seller item.	Small, 61.0	61.0
engineNumber	String	Engine number of the vehicle.	Small, 61.0	61.0
id	String	Unique identifier of the application form product.	Small, 61.0	61.0
intendedUse	String	Intention or purpose of use for a seller item related to an application form.	Small, 61.0	61.0
itemCondition	String	Condition of a seller item related to an application form.	Small, 61.0	61.0
make	String	Make of the seller item.	Small, 61.0	61.0
mileage	Integer	Mileage of the seller item.	Small, 61.0	61.0

Property Name	Type	Description	Filter Group and Version	Available Version
model	String	Model of the seller item.	Small, 61.0	61.0
name	String	Name of the application form seller item record.	Small, 61.0	61.0
partyFinancialAssetId	String	Details about the financial asset owned by an individual or account.	Small, 61.0	61.0
price	Double	Price of the product.	Small, 61.0	61.0
propertyAddress	<a href="#">Address Result</a>	Address of the property.	Small, 61.0	61.0
propertyAge	Double	Age of the property.	Small, 61.0	61.0
propertyUnitIdentifier	String	Unit identifier of the property.	Small, 61.0	61.0
recordTypeId	String	ID of the record type assigned to this object.	Small, 61.0	61.0
referenceObjectId	String	Product that the applicant has shown interest in buying.	Small, 61.0	61.0
scheduledDeliveryDate	String	Delivery date of the product to the applicant.	Small, 61.0	61.0
sellerId	String	Account ID of the vendor who is selling the asset. This is also the beneficiary.	Small, 61.0	61.0
trim	String	Trim type of the seller item.	Small, 61.0	61.0
type	String	Type of product.	Small, 61.0	61.0
vehicleIdentificationNumber	String	Unique identifier for the vehicle.	Small, 61.0	61.0
vehicleRegistrationNumber	String	Registration number of the vehicle.	Small, 61.0	61.0
year	Integer	Manufacture date of the seller item.	Small, 61.0	61.0

## Create Application Form Party Financial Asset

Output representation of the request to create the party financial asset.

Property Name	Type	Description	Filter Group and Version	Available Version
partyFinancialAssetAdditionalOwner	String[]	Information about the additional owner of a financial asset owned by an individual or account.	Small, 61.0	61.0

Property Name	Type	Description	Filter Group and Version	Available Version
partyFinancialAssetId	String	Details about the financial asset owned by an individual or account.	Small, 61.0	61.0
partyFinancialAssetLien	String[]	Details about the lien of the financial asset owned by an individual or account.	Small, 61.0	61.0

## Create Application Form Party Financial Liability

Output representation of the request to create the party financial liability.

Property Name	Type	Description	Filter Group and Version	Available Version
partyFinancialLiabilityBorrower	String[]	Borrower associated with the party financial liability.	Small, 61.0	61.0
partyFinancialLiabilityId	String	Financial liability associated with an individual or an organization.	Small, 61.0	61.0

## Create Application Form Party Identity Verification

Output representation of the request to create the application form party identity verification.

Property Name	Type	Description	Filter Group and Version	Available Version
partyIdentityVerificationId	String	ID of the party identity verification to provide details about the identity verification checks done for a party.	Small, 61.0	61.0
partyIdentityVerificationStep	String[]	ID of the party identity verification step to provide details about the identity verification done for a party.	Small, 61.0	61.0

## Create Application Form Applicant

Output representation of the request to create the application form applicant.

Property Name	Type	Description	Filter Group and Version	Available Version
applicantId	String	Applicant ID associated to the application form.	Small, 61.0	61.0
partyCreditProfile	String[]	Credit scores for the party.	Small, 61.0	61.0

Property Name	Type	Description	Filter Group and Version	Available Version
partyExpense	String[]	Expense details for the party.	Small, 61.0	61.0
partyFinancial Asset	<a href="#">Create Application Form Party Financial Asset[]</a>	Party financial asset associated to the application form applicant.	Small, 61.0	61.0
partyFinancial Liability	<a href="#">Create Application Form Party Financial Liability[]</a>	Party financial liability associated to the application form applicant.	Small, 61.0	61.0
partyIdentity Verification	<a href="#">Create Application Form Party Identity Verification[]</a>	Party identity verification associated to the application form applicant.	Small, 61.0	61.0
partyIncome	String[]	Income details for the party.	Small, 61.0	61.0
partyProfile Address	String[]	Details about the address of the party.	Small, 61.0	61.0
partyProfileId	String	Party profile ID associated to the application form.	Small, 61.0	61.0
partyProfile Risk	String[]	Details about the risk assessment done for a party.	Small, 61.0	61.0
person Employment	String[]	Details about a person's employment.	Small, 61.0	61.0

## Create Application Form

Output representation of the result with the created application form record.

Property Name	Type	Description	Filter Group and Version	Available Version
result	<a href="#">Create Application Form Result</a>	Application form record.	Small, 61.0	61.0

## Create Application Form Product

Output representation of the application form product.

Property Name	Type	Description	Filter Group and Version	Available Version
applicationForm ProductId	String	ID of the application form product.	Small, 61.0	61.0
applicationForm SellerItemId	String	ID of the application form seller item related to the application form product.	Small, 61.0	61.0

## Create Application Form Result

Output representation of the created application form record.

Property Name	Type	Description	Filter Group and Version	Available Version
accountId	String	ID of the application form account.	Small, 61.0	61.0
applicants	<a href="#">Create Application Form Applicant[]</a>	Details of the applicants related to the application form.	Small, 61.0	61.0
applicationFormId	String	ID of the application form.	Small, 61.0	61.0
applicationFormProducts	<a href="#">Create Application Form Product[]</a>	Application form product related to the application form result.	Small, 61.0	61.0

## Custom Fields Result

Output representation of the digital lending record with custom fields.

Property Name	Type	Description	Filter Group and Version	Available Version
name	String	Name of the custom field.	Small, 61.0	61.0
value	Object	Value of the custom field.	Small, 61.0	61.0

## Get Application Form

Output representation of the request to get the application form details.

Property Name	Type	Description	Filter Group and Version	Available Version
result	<a href="#">Get Application Form Result</a>	Result associated with the request to get application form details.	Small, 61.0	61.0

## Get Application Form Result

Output representation of the result from the get application form request.

Property Name	Type	Description	Filter Group and Version	Available Version
applicants	<a href="#">Applicant Wrapper Result[]</a>	Details of the applicant wrapper result.	Small, 61.0	61.0
applicationForm	<a href="#">Application Form Result</a>	Details of the application form result.	Small, 61.0	61.0

Property Name	Type	Description	Filter Group and Version	Available Version
applicationForm Products	<a href="#">Application Form Product Wrap Result[]</a>	Details of the application form product wrap result.	Small, 61.0	61.0

## Party Credit Profile Result

Output representation of the request to create the party credit profile.

Property Name	Type	Description	Filter Group and Version	Available Version
createdById	String	ID of the user who created the party credit profile.	Small, 61.0	61.0
createdDate	String	Date when the party credit profile was created.	Small, 61.0	61.0
creditBureau Name	String	Name of the credit bureau.	Small, 61.0	61.0
creditPrfl ReportIdentifier	String	Identifier of the credit profile report.	Small, 61.0	61.0
creditScore	Integer	Credit score details.	Small, 61.0	61.0
creditScoreDate	String	Date of the credit score.	Small, 61.0	61.0
customFields	<a href="#">Custom Fields Result[]</a>	Details of the custom fields.	Small, 61.0	61.0
id	String	ID of the party created profile.	Small, 61.0	61.0
lastModified ById	String	ID of the user who last modified the party credit profile.	Small, 61.0	61.0
lastModified Date	String	Date and time when a user last modified this record.	Small, 61.0	61.0
name	String	Name of the party credit profile.	Small, 61.0	61.0
ownerId	String	ID of the user who owns this record.	Small, 61.0	61.0
partyId	String	ID of the party record.	Small, 61.0	61.0
partyProfileId	String	ID of the party profile.	Small, 61.0	61.0
recordTypeId	String	ID of the record type.	Small, 61.0	61.0

## Party Expense Result

Output representation of the party expense result.

Property Name	Type	Description	Filter Group and Version	Available Version
applicationFormId	String	ID of the application form associated with the party expense.	Small, 61.0	61.0
createdById	String	ID of the user who created the record.	Small, 61.0	61.0
createdDate	String	Date when the record was created.	Small, 61.0	61.0
currencyIsoCode	String	If multiple currencies are enabled, this field contains the currency ISO code associated with the record.	Small, 61.0	61.0
customFields	<a href="#">Custom Fields Result[]</a>	Custom fields related to the application form product.	Small, 61.0	61.0
expenseAsOfDate	String	Date of the expense.	Small, 61.0	61.0
id	String	Record ID of the party expense.	Small, 61.0	61.0
isReadOnly	Boolean	Indicates whether the party expense is read only ( <code>true</code> ) or not ( <code>false</code> ).	Small, 61.0	61.0
lastModifiedById	String	ID of the user who last modified this record.	Small, 61.0	61.0
lastModifiedDate	String	Date and time when a user last modified this record.	Small, 61.0	61.0
name	String	Name of the party expense.	Small, 61.0	61.0
ownerId	String	ID of the user who owns this record.	Small, 61.0	61.0
partyFinancialLiabilityId	String	ID of the party financial liability.	Small, 61.0	61.0
partyId	String	ID of the party record.	Small, 61.0	61.0
partyProfileId	String	ID of the party profile record.	Small, 61.0	61.0
recordTypeId	String	ID of the record type assigned to this object.	Small, 61.0	61.0
recurrenceInterval	String	Interval after which the expense is incurred.	Small, 61.0	61.0
totalAmount	Double	Total amount of the expense.	Small, 61.0	61.0
type	String	Type of expense.	Small, 61.0	61.0
usageType	String	Usage type of the party expense.	Small, 61.0	61.0
verificationStatus	String	Indicates whether the party expense is verified ( <code>true</code> ) or not ( <code>false</code> ).	Small, 61.0	61.0

## Party Financial Asset Additional Owner Result

Output representation of the details of the additional owner of the party financial asset.

Property Name	Type	Description	Filter Group and Version	Available Version
accountId	String	Account associated with the additional owner.	Small, 61.0	61.0
applicantId	String	Applicant associated with the additional owner of the financial asset.	Small, 61.0	61.0
contactId	String	Contact associated with the additional owner.	Small, 61.0	61.0
createdById	String	ID of the user who created the record.	Small, 61.0	61.0
createdDate	String	Date the record was created.	Small, 61.0	61.0
currencyIsoCode	String	If multiple currencies are enabled, this field contains the currency ISO code associated with the record.	Small, 61.0	61.0
customFields	<a href="#">Custom Fields Result[]</a>	Custom fields related to the application form product.	Small, 61.0	61.0
id	String	Unique identifier of the additional owner of the party financial asset	Small, 61.0	61.0
lastModifiedById	String	ID of the user who last modified this record.	Small, 61.0	61.0
lastModifiedDate	String	Date and time when a user last modified this record.	Small, 61.0	61.0
name	String	Name of the application form product record.	Small, 61.0	61.0
ownershipSharePercent	Double	Percentage of the asset ownership between the primary and additional owner.	Small, 61.0	61.0
partyFinancialAssetId	String	Asset associated with the additional owner.	Small, 61.0	61.0
partyProfileId	String	Party profile associated with the additional owner of the financial asset.	Small, 61.0	61.0
recordTypeId	String	ID of the record type assigned to this object.	Small, 61.0	61.0
sourceSystemIdentifier	String	Unique identifier of the record in an external system.	Small, 61.0	61.0

## Party Financial Asset Lien Result

Output representation of the lien details of the party financial asset .

Property Name	Type	Description	Filter Group and Version	Available Version
createdById	String	ID of the user who created the record.	Small, 61.0	61.0
createdDate	String	Date when the record was created.	Small, 61.0	61.0
currencyIsoCode	String	If multiple currencies are enabled, this field contains the currency ISO code associated with the record.	Small, 61.0	61.0
customFields	<a href="#">Custom Fields Result[]</a>	Custom fields related to the application form product.	Small, 61.0	61.0
id	String	Unique identifier of the lien associated to the party financial asset.	Small, 61.0	61.0
isActive	Boolean	Indicates whether a record alert is active ( <code>true</code> ) or not ( <code>false</code> ).	Small, 61.0	61.0
lastModifiedById	String	ID of the user who last modified this record.	Small, 61.0	61.0
lastModifiedDate	String	Date and time when a user last modified this record.	Small, 61.0	61.0
lienAmount	Double	Amount of the lien.	Small, 61.0	61.0
lienHolder	String	Holder of the lien.	Small, 61.0	61.0
maturityDate	String	Maturity date of the lien.	Small, 61.0	61.0
name	String	Name of the lien.	Small, 61.0	61.0
partyFinancialAssetId	String	Party financial asset associated with the lien.	Small, 61.0	61.0
recordTypeId	String	ID of the record type assigned to this object.	Small, 61.0	61.0

## Party Financial Asset Result

Output representation of the party financial asset result.

Property Name	Type	Description	Filter Group and Version	Available Version
applicantId	String	Applicant ID related to the party financial asset.	Small, 61.0	61.0
createdById	String	ID of the user who created the record.	Small, 61.0	61.0
createdDate	String	Date when the record was created.	Small, 61.0	61.0
currencyIsoCode	String	If multiple currencies are enabled, this field contains the currency ISO code associated with the record.	Small, 61.0	61.0

Property Name	Type	Description	Filter Group and Version	Available Version
customFields	<a href="#">Custom Fields Result[]</a>	Custom fields related to the application form product.	Small, 61.0	61.0
description	String	Description of the party financial asset.	Small, 61.0	61.0
id	String	Unique identifier of the application form product.	Small, 61.0	61.0
isLienExisting	Boolean	Indicate whether there's a lien on the financial asset ( <code>true</code> ) or not ( <code>false</code> ).	Small, 61.0	61.0
isReadOnly	Boolean	Indicates whether the party financial asset is read only ( <code>true</code> ) or not ( <code>false</code> ).	Small, 61.0	61.0
lastModifiedById	String	ID of the user who last modified this record.	Small, 61.0	61.0
lastModifiedDate	String	Date and time when a user last modified this record.	Small, 61.0	61.0
makeName	String	Make name of the asset.	Small, 61.0	61.0
modelName	String	Model name of the asset.	Small, 61.0	61.0
modelYear	String	Model year of the asset.	Small, 61.0	61.0
name	String	Name of the application form product record.	Small, 61.0	61.0
ownerId	String	ID of the user who owns this record.	Small, 61.0	61.0
ownershipPercent	Double	Share owned by the party in percentage.	Small, 61.0	61.0
ownershipStartDateTime	String	Date and time when the ownership of the asset starts.	Small, 61.0	61.0
ownershipType	String	Type of ownership for the application form product.	Small, 61.0	61.0
partyFinancialAssetAdditionalOwner	<a href="#">Party Financial Asset Additional Owner Result[]</a>	Details of the additional owner associated to the party financial asset.	Small, 61.0	61.0
partyFinancialAssetLien	<a href="#">Party Financial Asset Lien Result[]</a>	Details of the lien associated to the party financial asset.	Small, 61.0	61.0
partyId	String	Party ID related to the party financial asset.	Small, 61.0	61.0
partyProfileId	String	Party profile ID related to the party financial asset.	Small, 61.0	61.0
payoffDueAmount	Double	Amount due to pay off the asset.	Small, 61.0	61.0

Property Name	Type	Description	Filter Group and Version	Available Version
pledgeAmount	Double	Amount the party pledges as collateral against a financial asset.	Small, 61.0	61.0
purchaseAmount	Double	Amount the party paid for the financial asset.	Small, 61.0	61.0
recordTypeId	String	ID of the record type assigned to this object.	Small, 61.0	61.0
serialNumber	String	Serial number of the asset.	Small, 61.0	61.0
sourceSystem Identifier	String	Unique identifier of the asset in the external system.	Small, 61.0	61.0
type	String	Type of the asset.	Small, 61.0	61.0
usageType	String	Usage type of the asset.	Small, 61.0	61.0
valuationAmount	Double	Worth of the asset after valuation.	Small, 61.0	61.0
valuation DateTime	String	Date and time of the valuation.	Small, 61.0	61.0
verification Status	String	Verification status of the party financial asset.	Small, 61.0	61.0

## Party Financial Liability Borrower Result

Output representation of the borrower details of the party financial liability.

Property Name	Type	Description	Filter Group and Version	Available Version
accountId	String	Account ID associated with the borrower of the party financial liability.	Small, 61.0	61.0
applicantId	String	Applicant ID associated with the borrower of the party financial liability.	Small, 61.0	61.0
contactId	String	Contact ID associated with the borrower of the party financial liability.	Small, 61.0	61.0
createdById	String	ID of the user who created the record.	Small, 61.0	61.0
createdDate	String	Date when the record was created.	Small, 61.0	61.0
customFields	<a href="#">Custom Fields Result[]</a>	Custom fields related to the application form product.	Small, 61.0	61.0
id	String	Unique identifier of the application form product.	Small, 61.0	61.0
lastModified ById	String	ID of the user who last modified this record.	Small, 61.0	61.0

Property Name	Type	Description	Filter Group and Version	Available Version
lastModifiedDate	String	Date and time when a user last modified this record.	Small, 61.0	61.0
name	String	Name of the application form product record.	Small, 61.0	61.0
ownerId	String	Name of the borrower record associated to the party financial liability.	Small, 61.0	61.0
partyFinancialLiabilityId	String	ID of the party financial liability associated with the borrower of the party financial liability.	Small, 61.0	61.0
partyProfileId	String	ID of the party profile associated with the borrower of the party financial liability.	Small, 61.0	61.0
recordTypeId	String	ID of the record type assigned to this object.	Small, 61.0	61.0
sharePercent	Double	Percentage of the asset shared between the primary and additional owner.	Small, 61.0	61.0
sourceSystemIdentifier	String	Unique identifier of the borrower of the party financial liability in the external system.	Small, 61.0	61.0

## Party Financial Liability Result

Output representation of the party financial liability result.

Property Name	Type	Description	Filter Group and Version	Available Version
applicantId	String	Applicant ID of the party financial liability.	Small, 61.0	61.0
applicationFormId	String	ID of the application form of the party financial liability.	Small, 61.0	61.0
createdById	String	ID of the user who created the record.	Small, 61.0	61.0
createdDate	String	Date when the record was created.	Small, 61.0	61.0
currencyIsoCode	String	If multiple currencies are enabled, this field contains the currency ISO code associated with the record.	Small, 61.0	61.0
customFields	<a href="#">Custom Fields Result[]</a>	Custom fields related to the application form product.	Small, 61.0	61.0
estimatedMonthlyPayment	Double	Estimated monthly payment.	Small, 61.0	61.0
id	String	Unique identifier of the product financial liability.	Small, 61.0	61.0

Property Name	Type	Description	Filter Group and Version	Available Version
interestRate	Double	Interest rate for the product.	Small, 61.0	61.0
isReadOnly	Boolean	Indicates whether the party financial liability is read only ( <code>true</code> ) or not ( <code>false</code> ).	Small, 61.0	61.0
isRepaymentActive	Boolean	Indicates whether the party financial liability is being paid ( <code>true</code> ) or not ( <code>false</code> ).	Small, 61.0	61.0
lastModifiedById	String	ID of the user who last modified this record.	Small, 61.0	61.0
lastModifiedDate	String	Date and time when a user last modified this record.	Small, 61.0	61.0
lender	String	Branch unit that owns the party financial liability.	Small, 61.0	61.0
liabilityAccountIdentifier	String	Unique identifier of the liability account.	Small, 61.0	61.0
name	String	Name of the application form product record.	Small, 61.0	61.0
outstandingBalance	Double	Remaining amount of the liability that the party owes.	Small, 61.0	61.0
ownerId	String	ID of the user who owns this record.	Small, 61.0	61.0
partyFinancialLiabilityBorrower	<a href="#">Party Financial Liability Borrower Result[]</a>	Details of the borrower associated with the party financial liability.	Small, 61.0	61.0
partyId	String	ID of the party record associated with the party financial liability.	Small, 61.0	61.0
recordTypeId	String	ID of the record type assigned to this object.	Small, 61.0	61.0
sharePercent	Double	Percentage of the asset shared between the primary and additional owner.	Small, 61.0	61.0
shareType	String	Details of the share type.	Small, 61.0	61.0
sourceSystemIdentifier	String	Unique identifier of the record in an external system.	Small, 61.0	61.0
startDate	String	Start date of the liability.	Small, 61.0	61.0
status	String	Status of the liability.	Small, 61.0	61.0
term	String	Term of the liability.	Small, 61.0	61.0
type	String	Type of the liability.	Small, 61.0	61.0
usageType	String	Usage type of the liability.	Small, 61.0	61.0

Property Name	Type	Description	Filter Group and Version	Available Version
verificationStatus	String	Verification status of the liability.	Small, 61.0	61.0

## Party Identity Verification Result

Output representation of the party identity verification result.

Property Name	Type	Description	Filter Group and Version	Available Version
createdById	String	ID of the user who created the record.	Small, 61.0	61.0
createdDate	String	Date when the record was created.	Small, 61.0	61.0
customFields	<a href="#">Custom Fields Result[]</a>	Custom fields related to the application form product.	Small, 61.0	61.0
id	String	Unique identifier of the party identity verification.	Small, 61.0	61.0
isResultOverridden	Boolean	Indicates whether the party identity verification result was overridden ( <code>true</code> ) or not ( <code>false</code> ).	Small, 61.0	61.0
lastModifiedById	String	ID of the user who last modified this record.	Small, 61.0	61.0
lastModifiedDate	String	Date and time when a user last modified this record.	Small, 61.0	61.0
name	String	Name of the application form product record.	Small, 61.0	61.0
overriddenById	String	Record of the user who's responsible for overriding the party identity verification result.	Small, 61.0	61.0
overriddenResult	String	Overridden result for a party after the party identity verification is complete.	Small, 61.0	61.0
ownerId	String	ID of the user who owns this record.	Small, 61.0	61.0
partyIdentityVerificationStep	<a href="#">Party Identity Verification Step Result[]</a>	Party identity verification step associated to the party identify verification.	Small, 61.0	61.0
partyProfileId	String	ID of the party profile related to the party identity verification.	Small, 61.0	61.0
recordTypeId	String	ID of the record type assigned to this object.	Small, 61.0	61.0

Property Name	Type	Description	Filter Group and Version	Available Version
reportUrl	String	URL of the report provided by the third-party identity verification agency.	Small, 61.0	61.0
requestCompletionDate	String	Date when the party identity verification request was completed.	Small, 61.0	61.0
result	String	Result of the party identity verification.	Small, 61.0	61.0
resultOverrideComment	String	Description of the party identity verification.	Small, 61.0	61.0
resultOverrideReason	String	Reason for overriding the party identity verification request.	Small, 61.0	61.0
status	String	Status of the party identity verification request.	Small, 61.0	61.0
thirdPartyVerfProcIdentifier	String	ID of the verification run in the third-party verification system.	Small, 61.0	61.0
thirdPartyVerfIdentifier	String	ID of the identity verification record in the third-party identity verification system.	Small, 61.0	61.0
thirdPartyVerificationRunUrl	String	Third-party URL to view details of the verification run on the party profile.	Small, 61.0	61.0
verificationRequestDate	String	Date when the party identity verification request was submitted.	Small, 61.0	61.0
verifiedBy	String	Name of the third-party that conducted the identity verification.	Small, 61.0	61.0

## Party Identity Verification Step Result

Output representation of the party identity verification step result.

Property Name	Type	Description	Filter Group and Version	Available Version
createdById	String	Name of the third-party that conducted the party identity verification step.	Small, 61.0	61.0
createdDate	String	Date when the record was created.	Small, 61.0	61.0
customFields	<a href="#">Custom Fields Result[]</a>	Custom fields related to the application form product.	Small, 61.0	61.0
id	String	Unique identifier of the party identify verification step.	Small, 61.0	61.0

Property Name	Type	Description	Filter Group and Version	Available Version
identityVerificationArtifactId	String	Artifact submitted for the party identity verification step.	Small, 61.0	61.0
lastModifiedById	String	ID of the user who last modified this record.	Small, 61.0	61.0
lastModifiedDate	String	Date and time when a user last modified this record.	Small, 61.0	61.0
name	String	Name of the party identity verification step.	Small, 61.0	61.0
ownerId	String	ID of the user who owns this record.	Small, 61.0	61.0
partyIdentityVerificationId	String	ID of the party identity verification related to the party identity verification step.	Small, 61.0	61.0
recordTypeId	String	ID of the record type assigned to this object.	Small, 61.0	61.0
reportUrl	String	URL of the report provided by the third-party identity verification agency.	Small, 61.0	61.0
status	String	Status of the third-party identity verification.	Small, 61.0	61.0
type	String	Type of the third-party identity verification.	Small, 61.0	61.0
verificationDecision	String	Decision taken after the third-party identity verification is completed.	Small, 61.0	61.0

## Party Income Result

Output representation of the party income result.

Property Name	Type	Description	Filter Group and Version	Available Version
applicationFormId	String	ID of the application form related to the party income.	Small, 61.0	61.0
createdById	String	ID of the user who created the record.	Small, 61.0	61.0
createdDate	String	Date when the record was created.	Small, 61.0	61.0
currencyIsoCode	String	If multiple currencies are enabled, this field contains the currency ISO code associated with the record.	Small, 61.0	61.0
customFields	<a href="#">Custom Fields Result[]</a>	Custom fields related to the party income.	Small, 61.0	61.0
id	String	Unique identifier of the party income.	Small, 61.0	61.0
incomeAmount	Double	Amount of the party income.	Small, 61.0	61.0

Property Name	Type	Description	Filter Group and Version	Available Version
incomeAsOfDate	String	Timestamp for when the income was last retrieved from an external data source.	Small, 61.0	61.0
incomeFrequency	String	Frequency of the party's income.	Small, 61.0	61.0
incomeSourceId	String	Source of the party's income.	Small, 61.0	61.0
incomeType	String	Type of income such as salary, commissions, and rentals.	Small, 61.0	61.0
isReadOnly	Boolean	Indicates whether the party income is read only ( <code>true</code> ) or not ( <code>false</code> ).	Small, 61.0	61.0
lastModifiedById	String	ID of the user who last modified this record.	Small, 61.0	61.0
lastModifiedDate	String	Date and time when a user last modified this record.	Small, 61.0	61.0
name	String	Name of the party income.	Small, 61.0	61.0
ownerId	String	ID of the user who owns this record.	Small, 61.0	61.0
partyId	String	ID of the party record of the party income.	Small, 61.0	61.0
partyProfileId	String	ID of the party profile record of the party income.	Small, 61.0	61.0
recordTypeId	String	ID of the record type assigned to this object.	Small, 61.0	61.0
usageType	String	Usage type of the party income.	Small, 61.0	61.0
verificationStatus	String	Verification status of the party income.	Small, 61.0	61.0

## Party Profile Address Result

Output representation of the party profile address result.

Property Name	Type	Description	Filter Group and Version	Available Version
addressType	String	Type of party address.	Small, 61.0	61.0
city	String	City for party address.	Small, 61.0	61.0
country	String	Country detail for the address.	Small, 61.0	61.0
countryCode	String	Country code for the address.	Small, 61.0	61.0
createdById	String	ID of the user who created the record.	Small, 61.0	61.0
createdDate	String	Date when the record was created.	Small, 61.0	61.0

Property Name	Type	Description	Filter Group and Version	Available Version
customFields	<a href="#">Custom Fields Result[]</a>	Custom fields related to the application form product.	Small, 61.0	61.0
geocode Accuracy	String	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.	Small, 61.0	61.0
id	String	Unique identifier of the party profile address.	Small, 61.0	61.0
isPrimaryAddress	Boolean	Indicates whether the party's address is the primary address ( <code>true</code> ) or not ( <code>false</code> ).	Small, 61.0	61.0
lastModified ById	String	ID of the user who last modified this record.	Small, 61.0	61.0
lastModified Date	String	Date and time when a user last modified this record.	Small, 61.0	61.0
latitude	Double	Used with <code>longitude</code> property to specify the precise geolocation of the address.	Small, 61.0	61.0
longitude	Double	Used with <code>latitude</code> property to specify the precise geolocation of the address.	Small, 61.0	61.0
name	String	Name of the party profile address record.	Small, 61.0	61.0
ownerId	String	ID of the user who owns this record.	Small, 61.0	61.0
postalCode	String	Postal code for the address.	Small, 61.0	61.0
recordTypeId	String	ID of the record type assigned to this object.	Small, 61.0	61.0
state	String	State detail for the address.	Small, 61.0	61.0
stateCode	String	State code for the address.	Small, 61.0	61.0
street	String	Street detail for the address.	Small, 61.0	61.0
validityEndDate	String	Date when the party profile address becomes valid.	Small, 61.0	61.0
validityStart Date	String	Date until when the party profile address is valid.	Small, 61.0	61.0

## Party Profile Result

Output representation of the party profile result.

Property Name	Type	Description	Filter Group and Version	Available Version
accountId	String	Account ID associated with the party profile.	Small, 61.0	61.0
contactId	String	Contact ID associated with the party profile.	Small, 61.0	61.0
countryOfBirth	String	Country of birth in the party profile.	Small, 61.0	61.0
countryOf Domicile	String	Country of domicile in the party profile	Small, 61.0	61.0
createdById	String	ID of the user who created the record.	Small, 61.0	61.0
createdDate	String	Date when the record was created.	Small, 61.0	61.0
creditScore	Double	Credit score of the party.	Small, 61.0	61.0
creditScore Provider	String	Name of the agency that provides the credit score of the party.	Small, 61.0	61.0
customFields	<a href="#">Custom Fields Result[]</a>	Custom fields related to the party profile.	Small, 61.0	61.0
dateOfBirth	String	Date of birth of the party profile.	Small, 61.0	61.0
employment Industry	String	Employment industry of the party profile.	Small, 61.0	61.0
employmentType	String	Type of employment held by the party.	Small, 61.0	61.0
firstName	String	First name of the party in the profile.	Small, 61.0	61.0
fullName	String	Full name of the party profile.	Small, 61.0	61.0
fundSource	String	Source of funds for a party in the profile.	Small, 61.0	61.0
gender	String	Gender of the party in the profile.	Small, 61.0	61.0
household AccountId	String	Household account that's associated with the party profile.	Small, 61.0	61.0
id	String	Unique identifier of the party profile.	Small, 61.0	61.0
isNetWorthHigh	Boolean	Indicates whether the customer has a high net worth ( <code>true</code> ) or not ( <code>false</code> ).	Small, 61.0	61.0
isOffBoarded	Boolean	Indicates whether the party profile was off-boarded ( <code>true</code> ) or not ( <code>false</code> ).	Small, 61.0	61.0
lastModified ById	String	ID of the user who last modified this record.	Small, 61.0	61.0
lastModified Date	String	Date and time when a user last modified this record.	Small, 61.0	61.0
lastName	String	Last name of the party in the profile.	Small, 61.0	61.0

Property Name	Type	Description	Filter Group and Version	Available Version
lastProfileReviewDate	String	Date when the party profile was last reviewed.	Small, 61.0	61.0
leadId	String	ID of the lead that's associated with the party profile.	Small, 61.0	61.0
middleName	String	Middle name of the party in the profile.	Small, 61.0	61.0
name	String	Name of the party profile record.	Small, 61.0	61.0
nationality	String	Nationalities held by the party profile.	Small, 61.0	61.0
nextProfileReviewDate	String	Date of the next party profile review.	Small, 61.0	61.0
offBoardingComments	String	Comments related to off boarding for the party profile review, if any.	Small, 61.0	61.0
offBoardingReason	String	Reason for off boarding.	Small, 61.0	61.0
orchestrationErrorMessage	String	Message that's generated when an error occurs during the orchestration.	Small, 61.0	61.0
orchestrationId	String	ID of the run-time orchestration.	Small, 61.0	61.0
orchestrationStatus	String	Status of the run-time orchestration.	Small, 61.0	61.0
ownerId	String	ID of the user who owns this record.	Small, 61.0	61.0
partyIdentityVerification	<a href="#">Party Identity Verification Result[]</a>	Party identity verification associated with the party profile.	Small, 61.0	61.0
partyProfileAddress	<a href="#">Party Profile Address Result[]</a>	Address associated with the party profile.	Small, 61.0	61.0
partyProfileRisk	<a href="#">Party Profile Risk Result[]</a>	Party profile risk associated with the party profile.	Small, 61.0	61.0
prefix	String	Prefix used by the party.	Small, 61.0	61.0
primaryEmail	String	Primary email address of the party that's specified in the profile.	Small, 61.0	61.0
primaryIdentificationName	String	Primary identification name that's specified in the profile.	Small, 61.0	61.0
primaryIdentifier	String	Unique identifier for the party.	Small, 61.0	61.0
primaryIdentifierType	String	Type of primary identification document defined in the profile.	Small, 61.0	61.0

Property Name	Type	Description	Filter Group and Version	Available Version
primaryPhone	String	Primary phone number of the party that's specified in the profile.	Small, 61.0	61.0
recordTypeId	String	ID of the record type assigned to this object.	Small, 61.0	61.0
relatedPartyProfileId	String	ID of the related party profile associated with this record.	Small, 61.0	61.0
residentType	String	Resident type of the party profile.	Small, 61.0	61.0
reviewDecision	String	Decision taken after the party profile review is complete.	Small, 61.0	61.0
stage	String	Current stage of the party profile.	Small, 61.0	61.0
suffix	String	Suffix of the party profile.	Small, 61.0	61.0
surnameAtBirth	String	Party surname at birth specified in the profile.	Small, 61.0	61.0
taxPayerIdentificationNumber	String	Identification number of the tax payer specified in the profile.	Small, 61.0	61.0
taxPayerIdentificationType	String	Type of taxpayer identification used for tax purposes.	Small, 61.0	61.0

## Party Profile Risk Result

Output representation of the party profile risk result.

Property Name	Type	Description	Filter Group and Version	Available Version
createdById	String	ID of the user who created the record.	Small, 61.0	61.0
createdDate	String	Date when the record was created.	Small, 61.0	61.0
customFields	<a href="#">Custom Fields Result[]</a>	Custom fields related to the application form product.	Small, 61.0	61.0
id	String	Unique identifier of the party profile risk.	Small, 61.0	61.0
isRiskOverridden	Boolean	Indicates whether the risk assessment result of the party was overridden ( <code>true</code> ) or not ( <code>false</code> ).	Small, 61.0	61.0
lastModifiedById	String	ID of the user who last modified this record.	Small, 61.0	61.0
lastModifiedDate	String	Date and time when a user last modified this record.	Small, 61.0	61.0

Property Name	Type	Description	Filter Group and Version	Available Version
name	String	Name of the party profile risk record.	Small, 61.0	61.0
overriddenRisk Category	String	Risk category that's overridden for a party after the assessment is complete.	Small, 61.0	61.0
ownerId	String	ID of the user who owns this record.	Small, 61.0	61.0
partyProfileId	String	ID of the party profile related to the party profile risk.	Small, 61.0	61.0
recordTypeId	String	ID of the record type assigned to this object.	Small, 61.0	61.0
riskCategory	String	Risk category that's assigned to a party profile after the assessment is complete.	Small, 61.0	61.0
riskOverridden ById	String	ID of the user who overrode the risk assessment result of the party.	Small, 61.0	61.0
riskOverride Reason	String	Reason for overriding the risk assessment result of the party.	Small, 61.0	61.0
type	String	Type of risk assessment.	Small, 61.0	61.0

## Person Employment Result

Output representation of the person employment result.

Property Name	Type	Description	Filter Group and Version	Available Version
createdById	String	ID of the user who created the record.	Small, 61.0	61.0
createdDate	String	Date when the record was created.	Small, 61.0	61.0
currencyIsoCode	String	If multiple currencies are enabled, this field contains the currency ISO code associated with the record.	Small, 61.0	61.0
customFields	<a href="#">Custom Fields Result[]</a>	Custom fields related to the person employment.	Small, 61.0	61.0
employerAddress	<a href="#">Address Result</a>	Details of the employer's address.	Small, 61.0	61.0
employerPhone	String	Phone number of the employer.	Small, 61.0	61.0
employmentStatus	String	Employment status of the applicant.	Small, 61.0	61.0
employmentType	String	Employment type for the party.	Small, 61.0	61.0
endDate	String	Last date of employment at this job.	Small, 61.0	61.0
hourlyWage	Double	Hourly wage details.	Small, 61.0	61.0

Property Name	Type	Description	Filter Group and Version	Available Version
id	String	Unique identifier of the person employment record.	Small, 61.0	61.0
lastModifiedById	String	ID of the user who last modified this record.	Small, 61.0	61.0
lastModifiedDate	String	Date and time when a user last modified this record.	Small, 61.0	61.0
name	String	Name for the record.	Small, 61.0	61.0
occupation	String	Person's occupation details.	Small, 61.0	61.0
ownerId	String	ID of the user who owns this record.	Small, 61.0	61.0
position	String	Last position of the person at this job.	Small, 61.0	61.0
recordTypeId	String	ID of the record type assigned to this object.	Small, 61.0	61.0
relatedPersonId	String	ID of the related person.	Small, 61.0	61.0
startDate	String	Start date of employment at this job.	Small, 61.0	61.0
weeklyHourCount	Integer	Number of hours per week that the party works for the employer.	Small, 61.0	61.0
workerType	String	Worker type for the party that's employed.	Small, 61.0	61.0

## Digital Lending Invocable Actions

Use invocable actions supported with Digital Lending to create and manage contract documents.

### [Create Contract Document Generation Action](#)

Create a contract for a specified record.

### [Check-In Contract Document Version Action](#)

Check-in a contract document version.

### [Perform Contract Action](#)

Perform actions on a contract based on its status.

### [Send e-Sign Contract Action](#)

Send a contract to specified recipients for e-signature.

## Create Contract Document Generation Action

Create a contract for a specified record.

This action is available in API version 61.0 and later.

## Supported REST HTTP Methods

### URI

/services/data/v63.0/actions/standard/createClnContract

### Formats

JSON, XML

### HTTP Methods

POST

### Authentication

Authorization: Bearer *token*

## Inputs

Input	Details
contractRecordType	<b>Type</b> String <b>Description</b> Required API name of the contract record type
documentTemplateName	<b>Type</b> String <b>Description</b> Required Name of the document template to use when creating the contract
sourceRecordId	<b>Type</b> ID <b>Description</b> Required ID of the record to use to populate the fields on the contract
isCreateContractDocument	<b>Type</b> Boolean <b>Description</b> Required Indicates whether to create a contract document in addition to the contract ( <i>true</i> ) or not ( <i>false</i> ).

## Output

Output	Details
contractId	<b>Type</b> String
	<b>Description</b> Collection that contains the ID of the contract that was created

## Usage

### Sample Input

This sample request is for the Create Contract Document Generation action.

```
{
  "sourceRecordId": "13ZSB0000000YxxAM",
  "contractRecordType": "ContractLifecycleManagement",
  "documentTemplateName": "SAMPLE_LoanApprovalTemplate",
  "isCreateContractDocument": true
}
```

### Sample Output

This sample response is for the Create Contract Document Generation action.

```
{
  "contractId": [
    "800SB00000KLbHxxA1"
  ]
}
```

## Check-In Contract Document Version Action

Check-in a contract document version.

This action is available in API version 61.0 and later.

## Supported REST HTTP Methods

### URI

/services/data/v**63.0**/actions/standard/checkInContractDocumentVersion

### Formats

JSON, XML

### HTTP Methods

POST

### Authentication

Authorization: Bearer *token*

## Inputs

Input	Details
contractDocumentVersionId	<b>Type</b> ID <b>Description</b> Required ID of the contract document version to check in.
isSaveWhenActionCompletes	<b>Type</b> Boolean <b>Description</b> Required Indicates whether to save the changes when the action completes ( <code>true</code> ) instead of when the flow ends ( <code>false</code> ).

## Output

Output	Details
checkedInContractDocumentVersionId	<b>Type</b> String <b>Description</b> ID of the contract document version that was checked in.

## Usage

### Sample Input

This sample request is for the Check-in Contract Document Version action.

```
{
  "contractDocumentVersionId": "0qtSG0000003qrxxAA",
  "isSaveWhenActionCompletes": true
}
```

### Sample Output

This sample response is for the Check-in Contract Document Version action.

```
{
  "checkedInContractDocumentVersionId": "0qtSG0000003qrxxAA"
}
```

## Perform Contract Action

Perform actions on a contract based on its status.

This action is available in API version 61.0 and later.

### Supported REST HTTP Methods

#### URI

/services/data/v<sup>63.0</sup>/actions/standard/performContractAction

#### Formats

JSON, XML

#### HTTP Methods

POST

#### Authentication

Authorization: Bearer *token*

### Inputs

Input	Details
actionData	<b>Type</b> String  <b>Description</b> JSON expression that contains the additional data necessary to perform the action on the contract.
actionName	<b>Type</b> ID  <b>Description</b> Required. API name of the action to perform on the contract.
contractId	<b>Type</b> Boolean  <b>Description</b> Required. ID of the contract to perform the action on.

### Output

Output	Details
contractId	<b>Type</b> String

Output	Details
	<b>Description</b> ID of the contract the action was performed on.

## Usage

### Sample Input

This sample request is for the Perform Contract action.

```
{
  "contractId": "800SG00000HtyxxYAB",
  "actionName": "activateContract"
  "actionData": "{\"testField\": \"testVal\"}"
}
```

### Sample Output

This sample response is for the Perform Contract action.

```
{
  "contractId": [
    "800SB00000KLbHxxA1"
  ]
}
```

## Send e-Sign Contract Action

Send a contract to specified recipients for e-signature.

This action is available in API version 61.0 and later.

### Supported REST HTTP Methods

#### URI

/services/data/v**63.0**/actions/standard/sendContractForESignature

#### Formats

JSON, XML

#### HTTP Methods

POST

#### Authentication

Authorization: Bearer *token*

## Inputs

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

Input	Details
	<b>Description</b> Required. ID of the contract to be sent to the recipients for e-signature.
emailTemplateName	<b>Type</b> String <b>Description</b> Required. Developer name of the email template to send to the recipients.
eSignatureVendorName	<b>Type</b> String <b>Description</b> Required. Name of the vendor providing the e-signature service.
getDocumentsApexClassName	<b>Type</b> String <b>Description</b> API name of the customer-created Apex class used to get a collection of Apex document records to send for e-signature.
getRecipientsApexClassName	<b>Type</b> String <b>Description</b> API name of the customer-created Apex class used to get a collection of Apex recipient records to send for e-signature.

## Output

Output	Details
sentContractId	<b>Type</b> String <b>Description</b> ID of the contract that was sent to the recipients.

Usage

Sample Input

This sample request is for the Send e-Sign Contract action.

```
{
  "contractId": "800SG00000HtyxxYAB",
  "eSignatureVendorName": "SampleVendor",
  "emailTemplateName": "SampleVendorEmailTemplate",
  "getDocumentsApexClassName": "GetEsignDocuments",
  "getRecipientsApexClassName": "GetEsignRecipients"
}
```

Sample Output

This sample response is for the Send e-Sign Contract action.

```
{
  "sentContractId": "800SG00000Hty4zYAB"
}
```

Digital Lending Metadata API Types

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

[Flow for Digital Lending](#)

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

Flow for Digital Lending

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

Digital Lending 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
<code>actionType</code>	InvokableActionType (enumeration of type string)	Required. The action type. Additional valid values only for Digital Lending include: <ul style="list-style-type: none"><li><code>checkInContractDocumentVersion</code>—Check-in a contract document version.</li><li><code>createClmContract</code>—Create a contract for a specified record.</li><li><code>performContractAction</code>—Perform actions on a contract based on its status.</li></ul>

Field Name	Field Type	Description
		<ul style="list-style-type: none"> <li><code>sendContractForESignature</code>—Send a contract to specified recipients for e-signature.</li> </ul>

## Digital Lending Apex Reference

Use the built-in Apex class for Digital Lending.

### [industriesdigitallending Namespace](#)

The `industriesdigitallending` namespace provides classes used in the Digital Lending Omniscritps, Flexcards, and Integration Procedures.

## industriesdigitallending Namespace

The `industriesdigitallending` namespace provides classes used in the Digital Lending Omniscritps, Flexcards, and Integration Procedures.

The `industriesdigitallending` namespace includes these classes.

### [DigitalLendingIntakeRecordsWrapper Class](#)

Contains methods that call utility methods from Omniscritps used in Digital Lending application intake process.

### [DigitalLendingPostIntakeRecordsWrapper Class](#)

Contains methods to call utility methods from Integration Procedures used in Digital Lending post intake Flexcards.

### [DigitalLendingProductsApi Class](#)

Contains methods to call utility methods from Integration Procedures used in Digital Lending Flexcards.

### [DigitalLendingUtils Class](#)

Contains methods to call utility methods from Integration Procedures used in Digital Lending post intake Flexcards.

### [PricingExecutionWrapper Class](#)

Contains the methods to call utility methods from integration procedures used in Digital Lending Flexcards.

## DigitalLendingIntakeRecordsWrapper Class

Contains methods that call utility methods from Omniscritps used in Digital Lending application intake process.

## Namespace

[industriesDigitalLending](#)

## Usage

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

### DigitalLendingIntakeRecordsWrapper Methods

The `DigitalLendingIntakeRecordsWrapper` class includes these methods to invoke the actions.

## DigitalLendingIntakeRecordsWrapper Methods

The `DigitalLendingIntakeRecordsWrapper` class includes these methods to invoke the actions.

### `call(action, args)`

This method invokes one of the available `DigitalLendingIntakeRecordsWrapper` actions and passes arguments to the action.

### `call(action, args)`

This method invokes one of the available `DigitalLendingIntakeRecordsWrapper` actions and passes arguments to the action.

## Signature

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

## Parameters

### *action*

Type: String

Action to call. Valid values are:

- `saveSelectedProposal`— Accepts an application form product ID and an application form product proposal ID. Updates a proposal's `SelectedBy` field with the `applicant` value and returns whether the update was successful.
- `setDocumentTypeValues`— Accepts a list of document type labels and returns a list of active document type IDs along with the label.
- `setActiveDataUsePurposeValues`— Accepts a list of data use purpose IDs and returns list of active data use purposes from the input list.
- `deleteFileFromRecycleBin`— Accepts a content document ID, deletes the content document from recycle bin, and returns a `success` boolean value.
- `getCommonDataUsePurposesPerSource`— Accepts data use purposes eligible for each applicant and returns the data use purposes per source or application form product.
- `validateUploadedDocuments`— Accepts document block which is a list of uploaded documents. Returns `Yes` if multiple documents of same document type are uploaded. Returns `No` if maximum one document is uploaded for each document type required by the application.

### *args*

Type: Map<String, Object>

First three keys must be input, output, and options. The required keys under input depend on the method the action invokes. All actions require input, output, and options arguments, but these can be empty if the action doesn't use them.

- `saveSelectedProposal`
  - `applicationFormProductId` — The `applicationFormProductId` argument of the action being called.
  - `proposalId` — The `proposalId` argument of the action being called.

- *isSelected* — The *isSelected* argument of the action being called.
- *setDocumentTypeValues*
  - *docTypeLabel* — List of document type labels separated by a comma.
- *setActiveDataUsePurposeValues*
  - *dataUsePurposeId* — List of data use purpose IDs separated by a comma.
- *validateUploadedDocuments*
  - *DocumentBlock* — List of uploaded documents.
- *deleteFileFromRecycleBin*
  - *relatedContentDocumentId* — The *relatedContentDocumentId* argument of the action being called.
- *getCommonDataUsePurposesPerSource*
  - *ProcessApplicantRecords* — The *ProcessApplicantRecords* argument of the action being called.

### Return Value

Type: Map<String, Object>

Returns values of the corresponding action as described in the Parameters section above.

### Usage

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

## DigitalLendingPostIntakeRecordsWrapper Class

Contains methods to call utility methods from Integration Procedures used in Digital Lending post intake Flexcards.

### Namespace

[industriesdigitallending Namespace](#)

### Usage

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

#### [DigitalLendingPostIntakeRecordsWrapper Methods](#)

The `DigitalLendingPostIntakeRecordsWrapper` class includes these methods to invoke the actions..

### DigitalLendingPostIntakeRecordsWrapper Methods

The `DigitalLendingPostIntakeRecordsWrapper` class includes these methods to invoke the actions..

`call(action, args)`

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

**`call(action, args)`**

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

### Signature

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

### Parameters

*action*

Type: String

Action to call. Valid values are:

- `getApplicantDetails`— Accepts an `applicationFormProductId` property and retrieves applicant details of all the applicants associated to the application form.
- `getApplicantProfile`— Accepts an `applicationFormProductId` property and retrieves applicant profile information of all the applicants associated to the application form.
- `getOffersForApplicant`— Accepts an `applicationFormProductId` property and retrieves offer details.
- `getSellerItem`— Accepts an `applicationFormProductId` property and retrieves seller item information.
- `saveOfferForApplicant`— Accepts an `applicationFormProductId` property and an offer ID to create a new offer. The new offer is set to final and selected by the lender, with the rest of the offer details matching the offer passed as an argument. Returns a `success` boolean variable.
- `callGetLoanDocumentsApi`— Accepts an `applicationFormProductId` property and retrieves loan documents related to it.
- `callCreateOfferApi`— Accepts an `applicationFormProductId` property, term, amount, and rate, and creates a new offer. Returns a boolean value indicating if the operation was successful.
- `canUserEditReadOnlyRecords`— Returns a boolean value indicating whether the current user has permission to edit read-only records (`true`) or not (`false`).

*args*

Type: Map<String, Object>

First three keys must be input, output, and options. The required keys under input depend on the method the action invokes. All actions require input, output, and options arguments, but these can be empty if the action doesn't use them.

- `getApplicantDetails`
  - `recordId` — The `applicationFormProductId` argument of the action that's called.
- `getApplicantProfile`
  - `recordId` — The `applicationFormProductId` argument of the action that's called.
- `getOffersForApplicant`
  - `recordId` — The `applicationFormProductId` argument of the action that's called.

- *getSellerItem*
  - *recordId* — The `applicationFormProductId` argument of the action that's called.
- *saveOfferForApplicant*
  - *recordId* — The `applicationFormProductId` argument of the action that's called.
  - *offerId* — The `applicationFormProductProposalId` argument of the action that's called.
- *callGetLoanDocumentsApi*
  - *recordId* — The `applicationFormProductId` argument of the action that's called.
- *callCreateOfferApi*
  - *recordId* — The `applicationFormProductId` argument of the action that's called.
  - *term* — The loan term argument of the action that's called.
  - *recommendedAmount* — The loan amount argument of the action that's called.
  - *rate* — The loan interest rate argument of the action that's called.

### Return Value

Type: `Map<String, Object>`

Returns values of the corresponding action as described in the Parameters section above.

### Usage

To use this method in an integration procedure, specify the class in the `Remote Class` property, the action in the `Remote Method` property, and the arguments in the `Additional Input` property.

## DigitalLendingProductsApi Class

Contains methods to call utility methods from Integration Procedures used in Digital Lending Flexcards.

### Namespace

[industriesdigitallending Namespace](#)

### Usage

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

#### [DigitalLendingProductsApi Methods](#)

The `DigitalLendingProductsApi` class includes these methods to invoke the actions.

## DigitalLendingProductsApi Methods

The `DigitalLendingProductsApi` class includes these methods to invoke the actions.

`call(action, args)`

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

**`call(action, args)`**

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

### Signature

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

### Parameters

*action*

Type: String

Action to call. Valid values are:

- `getProductListV60`— Retrieves a list of available products.
- `getProductDetailsV60`— Accepts `productId` parameter and retrieves the product details.

*args*

Type: Map<String, Object>

First three keys must be input, output, and options. The required keys under input depend on the method the action invokes. All actions require input, output, and options arguments, but these can be empty if the action doesn't use them.

- `getProductDetailsV60`
  - `productId`— The `productId` argument of the action that's called.

### Return Value

Type: Map<String, Object>

Returns values of the corresponding action as described in the Parameters section above.

### Usage

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

## DigitalLendingUtils Class

Contains methods to call utility methods from Integration Procedures used in Digital Lending post intake Flexcards.

### Namespace

[industriesdigitallending Namespace](#)

### Usage

Create a set of field names to identify the FLS (Field Level Security) for and pass this set as an argument to the method, along with the name of the entity to which the fields belong.

[DigitalLendingUtils Methods](#)

The `DigitalLendingUtils` class includes these methods.

## DigitalLendingUtils Methods

The `DigitalLendingUtils` class includes these methods.

[getFieldsReadOnlyMap\(entityName, fieldNames\)](#)

Accepts an entity's name and a list of its fields as input, and returns a value indicating whether the fields are read-only.

**getFieldIsReadOnlyMap(entityName, fieldNames)**

Accepts an entity's name and a list of its fields as input, and returns a value indicating whether the fields are read-only.

### Signature

```
public Map<String, Boolean> getFieldIsReadOnlyMap(String entityName, Set<String> fieldNames)
```

### Parameters

*entityName*

Type: String

Name of the entity to retrieve field information for.

*fieldNames*

Type: String

List of field names to determine if they are read-only.

### Return Value

Type: Map<String, Boolean>

Returns the fields that are read only.

### Usage

Create a set of field names to identify the Field Level Security (FLS) for, and pass this set as an argument to the method, along with the name of the entity to which the fields belong.

```
Set<String> applicantFieldsForFLS = new Set<String> {'birthdate', 'email', 'phone', 'firstname', 'lastname'};
Map<String, Boolean> flsInfo = DigitalLendingUtils.getFieldIsReadOnlyMap('Applicant', applicantFieldsForFLS);
```

## PricingExecutionWrapper Class

Contains the methods to call utility methods from integration procedures used in Digital Lending Flexcards.

## Namespace

[industriesdigitallending Namespace](#)

## Usage

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

### [PricingExecutionWrapper Methods](#)

The `PricingExecutionWrapper` class includes these methods.

## PricingExecutionWrapper Methods

The `PricingExecutionWrapper` class includes these methods.

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

This method calls one of the available `PricingExecutionWrapper` class actions and passes arguments to the action.

### **call(action, args)**

This method calls one of the available `PricingExecutionWrapper` class actions and passes arguments to the action.

## Signature

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

## Parameters

*action*

Type: String

Action to call. Valid values are:

- `executePricingWithDynamicProposals`—Accepts `contextDefinitionName`, `contextMappingName`, `CreditScore`, `InterestRateType`, `Stage`, `pricingProcedureName`, `Amount`, `ApplicationFormProductId`, and `Term` fields to execute pricing and create dynamic proposals.

*args*

Type: Map<String, Object>

First three keys must be input, output, and options. The required keys under input depend on the method the action invokes. All actions require input, output, and options arguments, but these can be empty if the action doesn't use them.

- `executePricingWithDynamicProposals`
  - `contextDefinitionName`—Developer defined context definition that's used for pricing.
  - `contextMappingName`—Name of the context mapping that's used for pricing.
  - `CreditScore`—Credit score of the applicant.
  - `InterestRateType`—Type of interest rate such as fixed or variable.
  - `Stage`—Current stage of the offer.
  - `pricingProcedureName`—Name of the pricing procedure.

- `Amount`— Loan amount of the offer.
- `ApplicationFormProductId`—Unique identifier of the application form product.
- `Term`—Loan term of the offer.

### Return Value

Type: `Map<String, Object>`

Returns values of the corresponding action as described in the Parameters section above.

### Usage

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

## Discovery Framework

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.

#### [Discovery Framework Metadata API Types](#)

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

#### [Discovery Framework Invocable Actions](#)

Use actions to invoke Discovery Framework actions in a flow.

#### [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](#).

#### [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.

#### [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.

## 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	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The ID of the account for which the assessment was taken.  This is a relationship field.</p> <p><b>Relationship Name</b> Account</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> Account</p>
ApplicantId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> 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.</p>
AssessmentRating	<p><b>Type</b> picklist</p>

Field	Details
	<p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The overall rating for the assessment.  Possible values are:</p> <ul style="list-style-type: none"> <li>• High</li> <li>• Low</li> <li>• Medium</li> </ul>
AssessmentStagedDataId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The Assessment Staged Data that's associated with this assessment.  This field is a relationship field.</p> <p><b>Relationship Name</b> AssessmentStagedData</p> <p><b>Refers To</b> AssessmentStagedData</p>
AssessmentStatus	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> Required. The status of the assessment.  Possible values are:</p> <ul style="list-style-type: none"> <li>• Canceled</li> <li>• Completed</li> <li>• In Progress</li> </ul>
AssessorId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The person who carried out the assessment and recorded the responses.  This field is a polymorphic relationship field.</p>

Field	Details
	<b>Relationship Name</b> Assessor
	<b>Refers To</b> Account, Contact, HealthcareProvider, User
CaseId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The ID of the case associated with the assessment. This is a relationship field.
	<b>Relationship Name</b> Case
	<b>Relationship Type</b> Lookup
	<b>Refers To</b> Case
CompletedDateTime	<b>Type</b> dateTime
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> The date and time when the assessment was completed.
ContactId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The ID of the contact associated with the assessment. This is a relationship field.
	<b>Relationship Name</b> Contact
	<b>Relationship Type</b> Lookup
	<b>Refers To</b> Contact

Field	Details
EffectiveDateTime	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The timestamp from when the assessment is effective.</p>
ExpirationDateTime	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The timestamp from when the assessment lapses.</p>
ExternalAssessmentDefId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The associated external assessment definition. This field is a relationship field.</p> <p><b>Relationship Name</b> ExternalAssessmentDef</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> ExternalAssessmentDefinition</p>
Identifier	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The unique identifier of a completed or partially completed assessment in the source system.</p>
IsSavedForLater	<p><b>Type</b> boolean</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Sort</p>

Field	Details
	<p><b>Description</b></p> <p>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.</p>
IsSuggestedAssessment	<p><b>Type</b></p> <p>boolean</p> <p><b>Properties</b></p> <p>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b></p> <p>Indicates whether the assessment is a suggested assessment (true) or not (false). The default value is <code>false</code>.</p>
LastReferencedDate	<p><b>Type</b></p> <p>dateTime</p> <p><b>Properties</b></p> <p>Filter, Nillable, Sort</p> <p><b>Description</b></p> <p>The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p><b>Type</b></p> <p>dateTime</p> <p><b>Properties</b></p> <p>Filter, Nillable, Sort</p> <p><b>Description</b></p> <p>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.</p>
Name	<p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Create, Filter, Group, idLookup, Sort, Update</p> <p><b>Description</b></p> <p>Required. The name of the assessment.</p>
OmniProcessId	<p><b>Type</b></p> <p>reference</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b></p> <p>The OmniScript associated with the assessment record. This field is available in API version 56.0 and later.</p>

Field	Details
	<p>This field is a relationship field.</p> <p><b>Relationship Name</b> OmniProcess</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> OmniProcess</p>
OwnerId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> The ID of the user who created the relationship record.  This is a polymorphic relationship field.</p> <p><b>Relationship Name</b> Owner</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> Group, User</p>
ParentId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The ID of the related assessment, if any.  This is a relationship field.</p> <p><b>Relationship Name</b> Parent</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> Assessment</p>
PartyProfileId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p><b>Description</b> 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.</p> <p><b>Relationship Name</b> PartyProfile</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> PartyProfile</p>
ResponseContextId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> 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.</p> <p><b>Relationship Name</b> ResponseContext</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b></p> <ul style="list-style-type: none"> <li>• ApplicationFormEvaluation - Available in API version 62.0 and later</li> <li>• BusinessLicenseApplication</li> <li>• CarePlan</li> <li>• IndividualApplication</li> <li>• PublicComplaint</li> <li>• VettingEvaluation - Available in API version 62.0 and later</li> <li>• Visit</li> </ul>
Type	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> Specifies the type of assessment. This field is available only if you have enabled Integrated Onboarding for Financial Services Cloud.</p>

## Associated Objects

This object has the following associated objects. If the API version isn'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	<b>Type</b> dateTime  <b>Properties</b> Create, Filter, Nillable, Sort, Update  <b>Description</b> The date and time when the assessment was approved by the publisher.
DisplayType	<b>Type</b> picklist  <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update  <b>Description</b> Specifies the display format for questions in the assessment for the end-user.
EffectiveFromDate	<b>Type</b> dateTime  <b>Properties</b> Create, Filter, Nillable, Sort, Update

Field	Details
	<b>Description</b> The date when the assessment takes effect.
EffectiveToDate	<b>Type</b> dateTime <b>Properties</b> Create, Filter, Nillable, Sort, Update <b>Description</b> The date until the assessment is in effect.
LastReferencedDate	<b>Type</b> dateTime <b>Properties</b> Filter, Nillable, Sort <b>Description</b> The date when the record was last referenced.
LastRevisedDateTime	<b>Type</b> dateTime <b>Properties</b> Create, Filter, Nillable, Sort, Update <b>Description</b> The date and time when the assessment was last revised.
LastViewedDate	<b>Type</b> dateTime <b>Properties</b> Filter, Nillable, Sort <b>Description</b> The date when the record was last viewed.
Name	<b>Type</b> string <b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort <b>Description</b> The name of the record.
OwnerId	<b>Type</b> reference <b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	<p><b>Description</b> The user who owns the record. This field is a polymorphic relationship field.</p> <p><b>Relationship Name</b> Owner</p> <p><b>Refers To</b> Group, User</p>
PerformerType	<p><b>Type</b> multipicklist</p> <p><b>Properties</b> Create, Filter, Nillable, Update</p> <p><b>Description</b> Specifies the type of performer that can record responses to the assessment.</p>
PublisherId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The organization or individual that published the assessment. This field is a polymorphic relationship field.</p> <p><b>Relationship Name</b> Publisher</p> <p><b>Refers To</b> Account, Contact, User</p>
Purpose	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The purpose of the assessment.</p>

## Associated Objects

This object has the following associated objects. If the API version isn'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	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The ID of the active version of the assessment question. This is a relationship field.</p> <p><b>Relationship Name</b> ActiveVersion</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> AssessmentQuestionVersion</p>
DataType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> Required. The data type of the assessment question. Possible values are:</p> <ul style="list-style-type: none"> <li>• Checkbox</li> <li>• Currency</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>• Date</li> <li>• DateTime</li> <li>• Decimal</li> <li>• Disclosure</li> <li>• EditBlock—Edit Block</li> <li>• Email</li> <li>• File</li> <li>• Formula</li> <li>• Integer</li> <li>• Multiselect—Multi-select</li> <li>• Radio</li> <li>• RadioGroup—Radio Group</li> <li>• Select</li> <li>• Telephone</li> <li>• Text</li> <li>• TextArea—Text Area</li> <li>• TextBlock—Text Block</li> <li>• Time</li> <li>• URL</li> </ul>
Description	<p><b>Type</b> textarea</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The description for the assessment question. This text is not rendered on the assessment.</p>
DeveloperName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> 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.</p>
DisplayTextCategory	<p><b>Type</b> picklist</p>

Field	Details
	<p><b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> Specifies the category of the display text when the data type is Text Block.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• Instruction</li> <li>• Legal</li> <li>• Security</li> </ul>
FormulaResponseDataType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> Specifies the data type of the question response calculated by a formula.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• Boolean</li> <li>• Currency</li> <li>• Date</li> <li>• Decimal</li> <li>• Integer</li> <li>• Text</li> </ul>
LastReferencedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p><b>Type</b> string</p>

Field	Details
	<b>Properties</b> Create, Filter, Group, idLookup, Sort, Update <b>Description</b> Required. The name of the record.
OwnerId	<b>Type</b> reference <b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update <b>Description</b> The ID of the user who created the relationship record. This is a polymorphic relationship field. <b>Relationship Name</b> Owner <b>Relationship Type</b> Lookup <b>Refers To</b> Group, User
QuestionCategory	<b>Type</b> picklist <b>Properties</b> Create, Filter, Group, Sort, Update <b>Description</b> Required. Stores the question category. Possible values are: <ul style="list-style-type: none"> <li>• Demographic</li> <li>• Financial</li> </ul>
QuestionText	<b>Type</b> textarea <b>Properties</b> Filter, Nillable, Sort <b>Description</b> Required. The label for the assessment question that appears on the assessment.
RelatedQuestionId	<b>Type</b> reference <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update

Field	Details
	<p><b>Description</b> Identifies the ID of the related question. Used to define a question hierarchy. This is a relationship field.</p> <p><b>Relationship Name</b> RelatedQuestion</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> AssessmentQuestion</p>
ShouldExcludeFromMetadata	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort</p> <p><b>Description</b> Indicates whether the assessment question record should be excluded from metadata (true) or not (false). The default value is <code>false</code>.</p>
ShouldHideInDesigner	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort</p> <p><b>Description</b> Indicates whether the assesment question record should be hidden in OmniScript designer (true) or not (false). The default value is <code>false</code>.</p>
SourceSystemName	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Specifies the source system name from where the content of the assessment question was retrieved. Possible values are:</p> <ul style="list-style-type: none"> <li>• MCG</li> </ul>

## Associated Objects

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

### 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	<b>Type</b> reference <b>Properties</b> Create, Filter, Group, Sort, Update <b>Description</b> Required. The ID of the assessment question associated with this record. This is a relationship field. <b>Relationship Name</b> AssessmentQuestion <b>Relationship Type</b> Lookup <b>Refers To</b> AssessmentQuestion
AssessmentQuestionSetId	<b>Type</b> reference <b>Properties</b> Create, Filter, Group, Sort, Update

Field	Details
	<p><b>Description</b> Required. The ID of the assessment question set associated with this record. This is a relationship field.</p> <p><b>Relationship Name</b> AssessmentQuestionSet</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> AssessmentQuestionSet</p>
LastReferencedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p><b>Description</b> Required. The name of the record.</p>
OwnerId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> The ID of the user who created the relationship record. This is a polymorphic relationship field.</p> <p><b>Relationship Name</b> Owner</p>

Field	Details
	<b>Relationship Type</b> Lookup
	<b>Refers To</b> 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
<code>AssessmentId</code>	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Sort
	<b>Description</b> Required. The ID of the assessment associated with this record. This is a relationship field.
	<b>Relationship Name</b> Assessment
	<b>Relationship Type</b> Lookup

Field	Details
	<b>Refers To</b> Assessment
AssessmentQuestionId	<b>Type</b> reference <b>Properties</b> Create, Filter, Group, Sort, Update <b>Description</b> Required. The ID of the assessment question associated with this record. This is a relationship field. <b>Relationship Name</b> AssessmentQuestion <b>Relationship Type</b> Lookup <b>Refers To</b> AssessmentQuestionVersion
ChoiceValue	<b>Type</b> textarea <b>Properties</b> Create, Filter, Nillable, Sort, Update <b>Description</b> The response value when the question's data type is choice.
CurrencyValue	<b>Type</b> currency <b>Properties</b> Create, Filter, Nillable, Sort, Update <b>Description</b> The response value when the question's data type is currency.
DateTimeValue	<b>Type</b> dateTime <b>Properties</b> Create, Filter, Nillable, Sort, Update <b>Description</b> The response value when the question's data type is date time.
DateValue	<b>Type</b> date

Field	Details
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> The response value when the question's data type is date.
DecimalResponseValue	<b>Type</b> double <b>Properties</b> Create, Filter, idLookup, Nillable, Sort, Update <b>Description</b> The response value when the question's data type is decimal.
ExtlAssessmentQuestionText	<b>Type</b> textarea <b>Properties</b> Create, Nillable, Update <b>Description</b> Stores the external assessment question text.
ExtlResponseValueIdentifier	<b>Type</b> string <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> The unique identifier of a response to a question in an external assessment.
IntegerResponseValue	<b>Type</b> int <b>Properties</b> Create, Filter, Group, idLookup, Nillable, Sort, Update <b>Description</b> The response value when the associated assessment question's data type is integer.
IsTrueOrFalseValue	<b>Type</b> boolean <b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update <b>Description</b> The response value when the question's data type is boolean. The default value is <code>false</code> .

Field	Details
LastReferencedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, idLookup, Sort, Update</p> <p><b>Description</b> Required. The name of this record.</p>
OriginType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> Specifies the origin of the assessment question response. Possible values are:</p> <ul style="list-style-type: none"> <li>• Auto</li> <li>• Manual</li> <li>• Override</li> </ul>
OwnerId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> The ID of the user who created the relationship record. This is a polymorphic relationship field.</p>

Field	Details
	<b>Relationship Name</b> Owner
	<b>Relationship Type</b> Lookup
	<b>Refers To</b> Group, User
ParentAsmtQuestionVersionId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The ID of the related assessment question version associated with the assessment question response.  This is a relationship field.
	<b>Relationship Name</b> ParentAsmtQuestionVersion
	<b>Relationship Type</b> Lookup
	<b>Refers To</b> AssessmentQuestionVersion
RespondentTimezone	<b>Type</b> string
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The auto-generated timezone of the respondent submitting the assessment response.
ResponseText	<b>Type</b> textarea
	<b>Properties</b> Create, Nillable, Update
	<b>Description</b> The response value when the question's data type is text.
ResponseType	<b>Type</b> string
	<b>Properties</b> Filter, Group, Nillable, Sort

Field	Details
	<b>Description</b> The data type of the response value submitted.
ResponseValue	<b>Type</b> textarea <b>Properties</b> Nillable <b>Description</b> The response value to the assessment question.
ResponseValueScore	<b>Type</b> double <b>Properties</b> Create, Filter, Nillable, Sort, Update <b>Description</b> The score of the assessment question response value.
ReviewerId	<b>Type</b> reference <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> The person who reviewed and edited the response. This field is a polymorphic relationship field. <b>Relationship Name</b> Reviewer <b>Refers To</b> Account, Contact, HealthcareProvider, User
ReviewerRoleId	<b>Type</b> reference <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> The role of the person who reviewed and edited the response. This field is a polymorphic relationship field. <b>Relationship Name</b> ReviewerRole <b>Refers To</b> CodeSet, CodeSetBundle

Field	Details
TimeValue	<p><b>Type</b> time</p> <p><b>Properties</b> Create, Filter, idLookup, Nillable, Sort, Update</p> <p><b>Description</b> The response value when the question's data type is time.</p>

## Associated Objects

This object has the following associated objects. If the API version isn'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	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> 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.</p>

Field	Details
LastReferencedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, idLookup, Sort, Update</p> <p><b>Description</b> Required. The question set name.</p>
OwnerId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> The ID of the user who created the relationship record. This is a polymorphic relationship field.</p> <p><b>Relationship Name</b> Owner</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> Group, User</p>

## Associated Objects

This object has the following associated objects. If the API version isn'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	<b>Type</b> dateTime <b>Properties</b> Filter, Nillable, Sort <b>Description</b> The date when the assessment question version was set to active.
AdditionalInformation	<b>Type</b> textarea <b>Properties</b> Create, Nillable, Update <b>Description</b> The additional details for an UI element, such as the disclosure text.
AssessmentQuestionId	<b>Type</b> reference <b>Properties</b> Create, Filter, Group, Sort <b>Description</b> Required. The ID of the assessment question associated with this record. This is a relationship field.

Field	Details
	<p><b>Relationship Name</b> AssessmentQuestion</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> AssessmentQuestion</p>
AssessmentQuestionSourceDocId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The ID of the assessment question source document that's associated with the assessment question version.  This field is a relationship field.</p> <p><b>Relationship Name</b> AssessmentQuestionSourceDoc</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> AssessmentQuestionSourceDoc  This field is available in API version 61.0 and later for users with the Generative AI Assessment Questions user license.</p>
DataType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> The data type of the assessment question associated with this record.  Possible values are:</p> <ul style="list-style-type: none"> <li>• Checkbox</li> <li>• Currency</li> <li>• Date</li> <li>• DateTime</li> <li>• Decimal</li> <li>• Disclosure</li> <li>• EditBlock—Edit Block</li> <li>• Email</li> <li>• File</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>• Formula</li> <li>• Integer</li> <li>• Multiselect—Multi-select</li> <li>• Radio</li> <li>• RadioGroup—Radio Group</li> <li>• Select</li> <li>• Telephone</li> <li>• Text</li> <li>• TextArea—Text Area</li> <li>• TextBlock—Text Block</li> <li>• Time</li> <li>• URL</li> </ul>
DeactivationDateTime	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The date when the assessment question version was set to inactive.</p>
Description	<p><b>Type</b> textarea</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The description for the assessment question. This text is not rendered on the assessment.</p>
DisplayTextCategory	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Specifies the category of the display text when the data type is Text Block. Possible values are:</p> <ul style="list-style-type: none"> <li>• Instruction</li> <li>• Legal</li> <li>• Security</li> </ul>
HelpText	<p><b>Type</b> string</p>

Field	Details
	<p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The text that's added as an infobubble in the UI element related to the assessment question.</p>
IsActive	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> Indicates whether the current version of the assessment question is set to active (<code>true</code>) or not (<code>false</code>).  The default value is <code>false</code>.</p>
IsOptionSourceResponseValue	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> Indicates whether the response value source for an assessment question is configured as custom or SObject in the OmniStudio designer (<code>true</code>) or not (<code>false</code>).  The default value is <code>false</code>.</p>
LastReferencedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p><b>Type</b> string</p>

Field	Details
	<p><b>Properties</b> Create, Filter, Group, idLookup, Sort, Update</p> <p><b>Description</b> Required. The name of the assessment question version record.</p>
QuestionCreationType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> Specifies how the assessment question is created from the assessment question source document. Possible values are:</p> <ul style="list-style-type: none"> <li>• GenAI</li> </ul> <p>This field is available in API version 61.0 and later for users with the Generative AI Assessment Questions user license.</p>
QuestionText	<p><b>Type</b> textarea</p> <p><b>Properties</b> Create, Filter, Sort, Update</p> <p><b>Description</b> Required. The assessment question text. Holds the label for the assessment question that appears on the assessment.</p>
ResponseValues	<p><b>Type</b> textarea</p> <p><b>Properties</b> Create, Nillable, Update</p> <p><b>Description</b> Specifies the values to be defined in the picklist, multiselect picklist, or radio buttons.</p>
Status	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The status of the assessment question version.</p>
VersionNumber	<p><b>Type</b> int</p>

Field	Details
	<b>Properties</b> Filter, Group, Nillable, Sort
	<b>Description</b> 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	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Sort
	<b>Description</b> The Assessment Question Version associated with the assessment question version choice. This field is a relationship field.
	<b>Relationship Name</b> AssessmentQuestionVersion

Field	Details
	<p><b>Relationship Type</b> Master-detail</p> <p><b>Refers To</b> AssessmentQuestionVersion (the master object)</p>
DisplayOrder	<p><b>Type</b> int</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The order in which the question choices is displayed for an assessment question version.</p>
Icon	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The name of the icon presented as a question choice when the assessment question is of the Icon type.</p>
Key	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> A unique code or identifier for a question choice that's mapped to an assessment question version.</p>
LastReferencedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>

Field	Details
Name	<b>Type</b> string <b>Properties</b> Create, Filter, Group, idLookup, Sort, Update <b>Description</b> 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	<b>Type</b> dateTime <b>Properties</b> Filter, Nillable, Sort <b>Description</b> The date when the record was last referenced.

Field	Details
LastViewedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The date when the record was last viewed.</p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p><b>Description</b> The name of the record.</p>
ParentAssessmentId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The parent assessment record that this assessment record belongs to.  This field is a relationship field.</p> <p><b>Relationship Name</b> ParentAssessment</p> <p><b>Relationship Type</b> Master-detail</p> <p><b>Refers To</b> Assessment (the master object)</p>
ReferenceRecordId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The reason for the assessment.  This field is a polymorphic relationship field.</p> <p><b>Relationship Name</b> ReferenceRecord</p> <p><b>Refers To</b> ClinicalServiceRequest, MedicationRequest</p>

Field	Details
ReferenceValue	<p><b>Type</b> textarea</p> <p><b>Properties</b> Create, Nillable, Update</p> <p><b>Description</b> The assessment reason in JSON format when there is no Salesforce record to be added as the reference record.</p>

## Associated Objects

This object has the following associated objects. If the API version isn'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	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The assessment record for which the session is saved.  This field is a relationship field.</p> <p><b>Relationship Name</b> Assessment</p>

Field	Details
	<b>Relationship Type</b> Master-detail <b>Refers To</b> Assessment
LastReferencedDate	<b>Type</b> dateTime <b>Properties</b> Filter, Nillable, Sort <b>Description</b> The most recent date on which a user referenced the record.
LastViewedDate	<b>Type</b> dateTime <b>Properties</b> Filter, Nillable, Sort <b>Description</b> The most recent date on which a user viewed the record.
Name	<b>Type</b> string <b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort <b>Description</b> The name of the assessment saved session record.
UsageType	<b>Type</b> picklist <b>Properties</b> Create, Filter, Group, Restricted picklist, Sort, Update <b>Description</b> Specifies the use case of the saved assessment session. Possible values are: <ul style="list-style-type: none"> <li>HealthCloud</li> </ul>

## 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	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> The assessment that's associated with the signature.  This field is a relationship field.</p> <p><b>Relationship Name</b> Assessment</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> Assessment</p>
DateTime	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Create, Filter, Sort, Update</p> <p><b>Description</b> The date and time of signature.</p>
DigitalSignatureId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The digital signature that's associated with the assessment signature record.  This field is a relationship field.</p> <p><b>Relationship Name</b> DigitalSignature</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> DigitalSignature</p>

Field	Details
LastReferencedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p><b>Description</b> The name of this assessment signature record.</p>
OmniscriptIdentifier	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> Identifier of signature instance in OmniScript Form.</p>
Place	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The location at the time of signature.</p>
SignedBy	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p>

Field	Details
	<b>Description</b> The name of the individual who signed the assessment.
SignedInitial	<b>Type</b> string <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> The initial used when signing the assessment.
SigneeId	<b>Type</b> reference <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> The user or contact who signed the assessment. This field is a polymorphic relationship field. <b>Relationship Name</b> Signee <b>Relationship Type</b> Lookup <b>Refers To</b> 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	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The Dynamic Data Capture associated with the assessment staged data. This field is a relationship field.</p> <p><b>Relationship Name</b> DynamicDataCapture</p> <p><b>Refers To</b> DynamicDataCapture</p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p><b>Description</b> Auto-assigned number that identifies the assessment staged data record.</p>
OwnerId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> The ID of the user who owns the record. This field is a polymorphic relationship field.</p> <p><b>Relationship Name</b> Owner</p>

Field	Details
	<b>Refers To</b> Group, User
ParentId	<b>Type</b> reference <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> The parent associated with the assessment staged data record. This field is a relationship field. <b>Relationship Name</b> Parent <b>Refers To</b> AssessmentStagedData
Response	<b>Type</b> textarea <b>Properties</b> Create, Nillable, Update <b>Description</b> The response to assessment questions as submitted by users, in JSON format.
ResponseProcessingError	<b>Type</b> textarea <b>Properties</b> Filter, Nillable, Sort <b>Description</b> The error encountered while processing the question responses for creating assessment and related records.
ResponseProcessingStatus	<b>Type</b> picklist <b>Properties</b> Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update <b>Description</b> Specifies the status of the processing of question responses, and the creation of the assessment and its related records. Possible values are: <ul style="list-style-type: none"> <li>Completed</li> <li>Failed</li> <li>Pending</li> </ul>

Field	Details
	The default value is <code>Pending</code> .

## Associated Objects

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

### [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	<b>Type</b> string <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> The context that's used to determine the applicable documents to be uploaded.
DocumentReferenceObjectId	<b>Type</b> reference <b>Properties</b> Create, Filter, Group, Sort, Update

Field	Details
	<p><b>Description</b> The document category or the document type related to the document decision. This field is a polymorphic relationship field.</p> <p><b>Relationship Name</b> DocumentReferenceObject</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> DocumentCategory, DocumentType</p>
HelpText	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The help information to show to memebbers when uploading the document.</p>
IsUploadRequired	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> Indicates whether a document upload for a document category is required (true) or not (false). The default value is <code>false</code>.</p>
LastReferencedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>

Field	Details
Name	<b>Type</b> string <b>Properties</b> Create, Filter, Group, idLookup, Sort, Update <b>Description</b> The name of the record.
OwnerId	<b>Type</b> reference <b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update <b>Description</b> The ID of the user who created the relationship record. This field is a polymorphic relationship field. <b>Relationship Name</b> Owner <b>Relationship Type</b> Lookup <b>Refers To</b> 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	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> Specifies the guideline category the external assessment belongs to.  Possible values are:</p> <ul style="list-style-type: none"> <li>• CCG</li> <li>• TC</li> </ul>
AssessmentContentVersion	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The version number of the external assessment's content.</p>
CustomAssessmentDisclaimer	<p><b>Type</b> textarea</p> <p><b>Properties</b> Create, Nillable, Update</p> <p><b>Description</b> A disclaimer for custom assessments sent by the external API.</p>
ExternalIdentifier	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, idLookup, Sort, Update</p> <p><b>Description</b> The unique identifier of the external assessment.</p>
IsCustomAssessment	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p>

Field	Details
	<p><b>Description</b></p> <p>Indicates whether the external assessment is a custom assessment authored by the user (true) or an out-of-the-box assessment (false).</p> <p>The default value is <code>false</code>.</p>
LastReferencedDate	<p><b>Type</b></p> <p>dateTime</p> <p><b>Properties</b></p> <p>Filter, Nillable, Sort</p> <p><b>Description</b></p> <p>The most recent date on which a user referenced this record.</p>
LastViewedDate	<p><b>Type</b></p> <p>dateTime</p> <p><b>Properties</b></p> <p>Filter, Nillable, Sort</p> <p><b>Description</b></p> <p>The most recent date on which a user viewed this record.</p>
Name	<p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Create, Filter, Group, idLookup, Sort, Update</p> <p><b>Description</b></p> <p>The name of the record.</p>
OwnerId	<p><b>Type</b></p> <p>reference</p> <p><b>Properties</b></p> <p>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b></p> <p>The ID of the user who created the record.</p> <p>This field is a polymorphic relationship field.</p> <p><b>Relationship Name</b></p> <p>Owner</p> <p><b>Relationship Type</b></p> <p>Lookup</p> <p><b>Refers To</b></p> <p>Group, User</p>

Field	Details
SourceSystemName	<p><b>Type</b></p> <p>picklist</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Sort, Update</p> <p><b>Description</b></p> <p>The source system from which the record was retrieved.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• MCG</li> </ul>

## Associated Objects

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

### 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	<p><b>Type</b></p> <p>reference</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Sort, Update</p> <p><b>Description</b></p> <p>Required. The ID of assessment question version associated with the Omni Process assessment question version record.</p> <p>This is a relationship field.</p>

Field	Details
	<p><b>Relationship Name</b> AssessmentQuestionVersion</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> AssessmentQuestionVersion</p>
IsImportant	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> Indicates whether the assessment question version is important (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>. Available in API version 59.0 and later.</p>
IsPrefill	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> Indicates whether the assessment question version is prefilled (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>. Available in API version 60.0 and later.</p>
LastReferencedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>

Field	Details
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p><b>Description</b> Required. The name of the Omni Process assessment question version record.</p>
OmniProcessElementId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> Required. The ID of the Omni Process element associated with the Omni Process assessment question version record.  This is a relationship field.</p> <p><b>Relationship Name</b> OmniProcessElement</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> OmniProcessElement</p>
OmniProcessId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> Required. The ID of the Omni Process associated with the Omni Process assessment question version record.  This is a relationship field.</p> <p><b>Relationship Name</b> OmniProcess</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> OmniProcess</p>
OwnerId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p>

Field	Details
	<b>Description</b> The ID of the user who created the relationship record. This is a polymorphic relationship field.
	<b>Relationship Name</b> Owner
	<b>Relationship Type</b> Lookup
	<b>Refers To</b> 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	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Sort, Update

Field	Details
	<p><b>Description</b> The reference record of the object associated with the suggested assessment. This field is a polymorphic relationship field.</p> <p><b>Relationship Name</b> AssessmentDefinitionRef</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> ExternalAssessmentDefinition, OmniProcess</p>
LastReferencedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The most recent date on which a user referenced this record.</p>
LastViewedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The most recent date on which a user viewed this record.</p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p><b>Description</b> The name of the record.</p>
OwnerId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> The ID of the user who created the record. This field is a polymorphic relationship field.</p> <p><b>Relationship Name</b> Owner</p>

Field	Details
	<b>Relationship Type</b> Lookup <b>Refers To</b> Group, User
PartyId	<b>Type</b> reference <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> The party for whom the assessment is suggested. This field is a polymorphic relationship field. <b>Relationship Name</b> Party <b>Relationship Type</b> Lookup <b>Refers To</b> Account
SourceContextId	<b>Type</b> reference <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> The context from which the suggested assessment definition record was created. This field is a polymorphic relationship field. <b>Relationship Name</b> SourceContext <b>Relationship Type</b> Lookup <b>Refers To</b> Case, ClinicalServiceRequest
Status	<b>Type</b> picklist <b>Properties</b> Create, Filter, Group, Restricted picklist, Sort, Update <b>Description</b> Specifies the status of the suggested assessment. Possible values are:

Field	Details
	<ul style="list-style-type: none"> <li>Completed</li> <li>Ignored</li> <li>InProgress—In Progress</li> <li>Suggested</li> </ul>

## Associated Objects

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

### [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	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The most recent date on which a user referenced this record.</p>
LastViewedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The most recent date on which a user viewed this record.</p>

Field	Details
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p><b>Description</b> The name of the record.</p>
PrimaryAsmtQuestionResponseId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The response value in the primary assessment that triggered the suggested assessment. This field is a relationship field.</p> <p><b>Relationship Name</b> PrimaryAsmtQuestionResponse</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> AssessmentQuestionResponse</p>
PrimaryAssessmentId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> The primary assessment from which a suggested assessment was triggered. This field is a relationship field.</p> <p><b>Relationship Name</b> PrimaryAssessment</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> Assessment</p>
SuggestedAssessmentDefId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The suggested assessment associated with the suggested assessment reason.</p>

Field	Details
	<p>This field is a relationship field.</p> <p><b>Relationship Name</b> SuggestedAssessmentDef</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> SuggestedAssessmentDef</p>
SuggestionSourceType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Specifies the source of the logic by which an assessment was suggested. Possible values are:</p> <ul style="list-style-type: none"> <li>• Business Rule</li> <li>• MCG</li> </ul>

## Associated Objects

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

### [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](#).

### [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.

[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.

## 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
<code>description</code>	<b>Field Type</b> string <b>Description</b> A description of the DocumentCategory.
<code>isProtected</code>	<b>Field Type</b> boolean <b>Description</b> An auto-generated value that doesn't impact the behavior of the metadata type. The default value is <code>false</code> .
<code>masterLabel</code>	<b>Field Type</b> string <b>Description</b> Required.

Field Name	Description
	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	<b>Field Type</b> string <b>Description</b> Required. The master label of the related DocumentCategory.
documentType	<b>Field Type</b> string <b>Description</b> Required. The master label of the related DocumentType.
isProtected	<b>Field Type</b> boolean <b>Description</b> An auto-generated value that doesn't impact the behavior of the metadata type. The default value is <code>false</code> .
masterLabel	<b>Field Type</b> string <b>Description</b> 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	<b>Field Type</b> string
	<b>Description</b> A description of the DocumentType.

Field Name	Description
isActive	<p><b>Field Type</b> boolean</p> <p><b>Description</b> Required. Specifies whether the DocumentType is active.</p>
masterLabel	<p><b>Field Type</b> string</p> <p><b>Description</b> Required. The master label of the DocumentType. This internal label doesn't get translated.</p>

## 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](#).

## 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"
```

```
1,
"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: <ul style="list-style-type: none"><li>• <code>getAssessmentResponseSummary</code>—Invoke the Get Assessment Response Summary action. This value is available in API version 57.0 and later.</li></ul>

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	<p><b>Type</b></p> <p>ID</p> <p><b>Description</b></p> <p>Required. The ID of the assessment record for which to summarize responses.</p>

Outputs

Output	Details
assessmentResponseSummary	<p><b>Type</b></p> <p>string</p> <p><b>Description</b></p> <p>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.</p>

## 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](#)

Represents 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	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> 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.</p> <p> <b>Note:</b> 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.</p>
Language	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Restricted picklist, Sort</p> <p><b>Description</b> Language of the assessment question.</p>
ManageableState	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Indicates the manageable state of the specified component that is contained in a package. Possible values are:</p> <ul style="list-style-type: none"> <li>• beta—Managed-Beta</li> <li>• deleted—Managed-Proposed-Deleted</li> <li>• deprecated—Managed-Proposed-Deprecated</li> <li>• deprecatedEditable—SecondGen-Installed-Deprecated</li> <li>• installed—Managed-Installed</li> <li>• installedEditable—SecondGen-Installed-Editable</li> <li>• released—Managed-Released</li> <li>• unmanaged—Unmanaged</li> </ul>

Field	Details
MasterLabel	<b>Type</b> string <b>Properties</b> Filter, Group, Sort <b>Description</b> Label of the assessment question.
NamespacePrefix	<b>Type</b> string <b>Properties</b> Filter, Group, Nillable, Sort <b>Description</b> Namespace prefix associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix.

## AssessmentQuestionSetConfig

Represents the assessment question set record metadata configuration. This object is available in API version 56.0 and later.

### Supported SOAP API Calls

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

### Supported REST API Methods


`GET`, `HEAD`, `Query`

### Special Access Rules

To use this tooling API object, you must enable the Discovery Framework feature in your Salesforce org.

### Fields

Field	Details
DeveloperName	<b>Type</b> string <b>Properties</b> Filter, Group, Sort <b>Description</b> 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.

Field	Details
	<p>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.</p> <p> <b>Note:</b> 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.</p>
Language	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Restricted picklist, Sort</p> <p><b>Description</b> Language of the assessment question set.</p>
ManageableState	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Indicates the manageable state of the specified component that is contained in a package. Possible values are:</p> <ul style="list-style-type: none"> <li>• beta—Managed-Beta</li> <li>• deleted—Managed-Proposed-Deleted</li> <li>• deprecated—Managed-Proposed-Deprecated</li> <li>• deprecatedEditable—SecondGen-Installed-Deprecated</li> <li>• installed—Managed-Installed</li> <li>• installedEditable—SecondGen-Installed-Editable</li> <li>• released—Managed-Released</li> <li>• unmanaged—Unmanaged</li> </ul>
MasterLabel	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> Label of the assessment question set.</p>
NamespacePrefix	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p>

Field	Details
	<b>Description</b> 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": "001SG000000laIWPYA2",
    "identifier": "Test identifier",
    "assessmentDetails": {
      "assessmentReasons": [
        {
          "referenceRecord": "0jySG0000000qRdYAI"
        },
        {
          "referenceRecord": "0SqSG000000005HR0AY"
        },
        {
          "referenceRecord": "0kmSG0000000n7BYAQ",
          "referenceValue": "Medication Request sample"
        },
        {
          "referenceValue": "Reference Record not present"
        }
      ],
      "assessmentQuestionsResponseDetails": {
        "First_Name": {
          "originType": "Auto",
          "reviewerRole": "0hsSG00000002t8TYAQ",
          "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
assessment Values	<a href="#">Assessment Values Input</a> > on page 873[]	Values of Assessment fields.	Optional	60.0
contextId	String	Context record for the OmniScript.	Optional	60.0
inputs	<a href="#">Question Responses Input</a> []	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/omniscrypt/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 Omniscrypt. For example, Discovery Framework.	Required	60.0

**Response body for GET**[Omniscrypt 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": "0SqSG000000005HRxxY"
      },
      {
        "referenceRecord": "0kmSG00000000n7BxxQ",
        "referenceValue": "Medication Request sample"
      },
      {
        "referenceValue": "Reference Record not present"
      }
    ],
    "assessmentQuestionsResponseDetails": {
      "First_Name": {
        "originType": "Auto",
        "reviewerRole": "0hsSG00000002t8TxxQ",
        "reviewer": "003SG00000BTzxpxxD"
      },
      "Last_Name": {
        "originType": "Auto",
        "reviewerRole": "0hsSG00000002t8TxxQ",
        "reviewer": "003SG00000BTzxpxxD"
      },
      "Email": {
        "originType": "Auto",
        "reviewerRole": "0hsSG00000002t8TxxQ",
        "reviewer": "003SG00000BTzxpxxD"
      },
      "Phone": {
        "originType": "Auto",
        "reviewerRole": "0hsSG00000002t8TxxQ",
        "reviewer": "003SG00000BTzxpxxD"
      },
      "Multi_Select": {
        "originType": "Auto",
        "reviewerRole": "0hsSG00000002t8TxxQ",
        "reviewer": "003SG00000BTzxpxxD"
      }
    }
  }
}

```

### Properties

Name	Type	Description	Required or Optional	Available Version
<del>assessmentQuestionsResponseDetails</del>	Map<String, Object>	The details of the assessment questions response. Only available for Health Cloud users.	Optional	63.0

Name	Type	Description	Required or Optional	Available Version
assessmentReasons	<a href="#">AssessmentReasons</a> on page 870	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
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": "001SG000001aIWPYA2",
  }
}
```

```

    "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
assessment Values	<a href="#">Assessment Values Input</a> > on page 873[]	Values of Assessment fields.	Optional	60.0
contextId	String	Context record for the OmniScript.	Optional	60.0
inputs	<a href="#">Question Responses Input</a> []	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": "001SG000001aIWPYA2",
    "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
<del>assessmentStatus</del>	String	Status of the assessment.	Optional	60.0
assessmentDetails	<a href="#">Assessment Report</a> on page 868	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
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

Attribute Name	Type	Description	Filter Group and Version	Available Version
displayType	String	Specifies the display format for questions in the assessment for the end-user. Possible values are: <ul style="list-style-type: none"> <li>• Sequential</li> <li>• Prior-edit</li> <li>• Random.</li> </ul>	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: <ul style="list-style-type: none"> <li>• Patient</li> <li>• Practioner</li> <li>• Related Person.</li> </ul>	Small, 63.0	63.0
purpose	String	The purpose of the assessment.	Small, 63.0	63.0
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

Property Name	Type	Description	Filter Group and Version	Available Version
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 Omniscrypt elements.


### JSON example

```
"customTypeDetails" : {
  "discoveryFramework": {
    "questionText": "Can you provide more details about the transaction"
  }
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
discovery Framework	<a href="#">OS Element</a> <a href="#">Discovery Framework</a> <a href="#">Framework</a>	Custom type details for the Omniscrypt 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
defaultMaximum FileSizeAllowed	Integer	Default maximum file size if maximumFile SizeAllowed is null for a Document Type.	Small, 59.0	59.0
defaultMaximum FileUploads Allowed	Integer	Default maximum file uploads if maximumFile UploadsAllowed is null for a Document Type.	Small, 59.0	59.0
document CategoryId	String	ID of the Document Category.	Small, 59.0	59.0
document CategoryLabel	String	Master label of the Document Category.	Small, 59.0	59.0

Attribute Name	Type	Description	Filter Group and Version	Available Version
documentTypes	<a href="#">Document Types Output[]</a>	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 <code>isRequired</code> isn't set, the <code>isUploadRequired</code> value is used. If neither <code>isRequired</code> nor <code>isUploadRequired</code> is set, the default is <code>false</code> .	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
decisionTable Document Decisions	<a href="#">Decision Table Document Decision Output</a>	Decision Table output.	Big, 59.0	59.0
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 ( <code>true</code> ), or failed ( <code>false</code> ).	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

Attribute Name	Type	Description	Filter Group and Version	Available Version
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
customType Details	<a href="#">Custom Type Details[]</a>	Custom type details for the Omniscrypt element.	Small, 60.0	60.0
description	String	Description of the Omniscrypt element.	Small, 60.0	60.0
designer Customization Type	String	The customization type of the Omniscrypt element.	Small, 60.0	60.0
discovery Framework UsageType	String	Discovery framework usage type of the Omniscrypt element.	Small, 60.0	60.0
elements	<a href="#">Omniscrypt Elements List[]</a>	Elements within the Omniscrypt element.	Small, 60.0	60.0
level	String	Level of the Omniscrypt element.	Small, 60.0	60.0
name	String	Name of the Omniscrypt element.	Small, 60.0	60.0
omniProcess VersionNumber	String	OmniProcess version number of the Omniscrypt element.	Small, 60.0	60.0
parentElement Name	String	Parent element name of the Omniscrypt element.	Small, 60.0	60.0
parentElement Type	String	Parent element type of the Omniscrypt element.	Small, 60.0	60.0
propertySet Config	<a href="#">OS Element Property Set[]</a>	Property set configuration of the Omniscrypt element.	Small, 60.0	60.0
sequence Number	String	Sequence number of the Omniscrypt element.	Small, 60.0	60.0
type	String	Type of the Omniscrypt element.	Small, 60.0	60.0

## Omniscrypt Output

Output representation of the details of the Omniscrypt.

**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	<a href="#">additionalAttributes Output[]</a>	Additional attributes of the Omniscrypt.	Small, 63.0	63.0
description	String	Description of the Omniscrypt.	Small, 60.0	60.0
designer Customization Type	String	Custom type of the Omniscrypt.	Small, 60.0	60.0
discovery FrameworkUsage Type	String	Usage type of the Omniscrypt.	Small, 60.0	60.0
elements	<a href="#">OmniscryptElements List[]</a>	Element node of the Omniscrypt.	Small, 60.0	60.0
isActive	Boolean	Indicates if the Omniscrypt assessment is active ( <code>true</code> ) or not ( <code>false</code> ).	Small, 60.0	60.0
language	String	Language of the Omniscrypt.	Small, 60.0	60.0
lastModifiedDate	String	Date when the Omniscrypt was modified.	Small, 60.0	60.0
name	String	Name of the Omniscrypt.	Small, 60.0	60.0
omniprocessId	String	ID of the Omniscrypt associated with the assessment record.	Small, 60.0	60.0
subType	String	Subtype of the Omniscrypt.	Small, 60.0	60.0
type	String	Type of the Omniscrypt.	Small, 60.0	60.0
versionNumber	String	Version of the Omniscrypt.	Small, 60.0	60.0
uniqueName	String	Unique name for the Omniscrypt.	Small, 60.0	60.0

## Omniscrypt Element Discovery Framework Output

Output representation of the custom type details of the Omniscrypt 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

Property Name	Type	Description	Filter Group and Version	Available Version
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
questionCategory	String	Category of the question for the Discovery Framework question type element.	Small, 60.0	60.0
questionDataType	String	Data type of the question for the Discovery Framework question type element.	Small, 60.0	60.0
questionDeveloperName	String	Developer name of the question for the Discovery Framework question type element.	Small, 60.0	60.0
questionNamespace	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

Property Name	Type	Description	Filter Group and Version	Available Version
expression	String	Formula expression of the Omniscrypt element from the property set configuration.	Small, 60.0	60.0
help	String	Help details of the Omniscrypt element from the property set configuration.	Small, 60.0	60.0
helpText	String	Help text of the Omniscrypt element from the property set configuration.	Small, 60.0	60.0
label	String	Label of the Omniscrypt element from the property set configuration.	Small, 60.0	60.0
options	List<Map<String, Object>>	Options of the Omniscrypt element from the property set configuration.	Small, 60.0	60.0
radioLabels	List<Map<String, Object>>	Radio labels of the Omniscrypt element from the property set configuration for the radio group child questions.	Small, 60.0	60.0
required	String	Specifies whether the Omniscrypt 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 Omniscrypt element from the property set configuration.	Small, 60.0	60.0
text	String	Text of the Omniscrypt element from the property set configuration.	Small, 60.0	60.0
type	String	Type of the Omniscrypt 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.	DiscoveryFrmwrk.PrefillAssessment 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": "0U3R0000000Aai0AE", "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": "0U3R0000000Aai0AE"}

#### 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?"
  }
}
```

## Decision Explorer

---

Decision Explorer 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 Explorer Business APIs](#)

Use the Decision Explorer Business APIs to give users a seamless API experience for applications to audit their past events.

[Decision Explorer Tooling API Objects](#)

Decision Explorer objects store and locate the metadata associated with every business rule.

[Decision Explorer Metadata API Types](#)

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

## Decision Explorer Business APIs

Use the Decision Explorer Business APIs to give users a seamless API experience for applications to audit their past events.

[Resources](#)

Here's a list of Decision Explorer API resources.

[Request Bodies](#)

Here's a list of Decision Explorer API request bodies.

[Response Bodies](#)

Here's a list of Decision Explorer API response bodies.

## Resources

Here's a list of Decision Explorer 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

Parameter Name	Type	Description	Required or Optional	Available Version
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 ExplainabilityActionDef ProcessType field.	Optional	54.0
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\": \"0k0xx0000000JNAAY\", \"variables\": { \"details\": { [ { \"apiName\": \"total\", \"isEditable\": true, \"defaultValue\": null, \"displayName\": null, \"dataType\": \"Number\", \"precision\": 2, \"calculationMatrixName\": null, \"name\": \"total\", \"isUserDefined\": true, \"uiDisplayOrder\": null, \"id\": \"0k0xx000000018zFAA\" }, { \"apiName\": \"input\", \"isEditable\": true, \"defaultValue\": \"10\", \"displayName\": null, \"dataType\": \"Number\", \"precision\": 2, \"calculationMatrixName\": null, \"name\": \"input\", \"isUserDefined\": true, \"uiDisplayOrder\": null, \"id\": \"0k0xx00000001A6FAI\" } ] }, \"code\": null, \"endDate\": null, \"description\": null, \"message\": null, \"enabled\": true, \"versionNumber\": 2, \"versionId\": \"0klxx00000000knAAA\", \"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**

<b>Name</b>	<b>Type</b>	<b>Description</b>	<b>Required or Optional</b>	<b>Available Version</b>
action ContextCode	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
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\": \"0k0xx0000000JNAA\",
  \"variables\": { \"details\": [ { \"apiName\": \"total\", \"isEditable\": true, \"defaultValue\": null, \"displayName\": null, \"dataType\":
  \"Number\", \"precision\": 2, \"calculationMatrixName\": null, \"name\": \"total\", \"isUserDefined\": true, \"uiDisplayOrder\": null,
  \"id\": \"0k0xx000000018zFAA\" }, { \"apiName\": \"input\", \"isEditable\": true, \"defaultValue\": \"10\", \"displayName\": null, \"dataType\":
  \"Number\", \"precision\": 2, \"calculationMatrixName\": null, \"name\": \"input\", \"isUserDefined\": true, \"uiDisplayOrder\": null, \"id\":
  \"0k0xx00000001A6FAA\" } ] }, \"code\": null, \"endDate\": null, \"description\": null, \"message\": null, \"enabled\": true, \"versionNumber\": 2,
  \"versionId\": \"0klxx00000000knAAA\", \"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
actionContext Code	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
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

Name	Type	Description	Required or Optional	Available Version
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
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	<a href="#">Explainability Action Log Detail</a> []	Represents the list of explainability action logs.	Small, 54.0	54.0
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

Property Name	Type	Description	Filter Group and Version	Available Version
<code>applicationSubType</code>	String	The subtype of the associated application for which the explainability log is generated.  This matches one of the valid values in the <code>ExplainabilityActionDef ApplicationSubType</code> field.	Small, 54.0	54.0
<code>applicationType</code>	String	The name of the application for which the explainability service is run.  This matches one of the valid values in the <code>ExplainabilityActionDef ApplicationType</code> field.	Small, 54.0	54.0
<code>explainabilitySpecName</code>	String	The name that identifies the explainability specification.	Small, 57.0	57.0
<code>name</code>	String	A name to identify the explainability action log record.	Small, 54.0	54.0
<code>primaryFilter</code>	String	The string that's used as the primary filter criteria to fetch the explainability action logs.	Small, 57.0	57.0
<code>processType</code>	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 <code>ExplainabilityActionDef ProcessType</code> field.	Small, 54.0	54.0
<code>secondaryFilter</code>	String	The string that's used as the secondary filter criteria to fetch the explainability action logs.	Small, 57.0	57.0

## Decision Explorer Tooling API Objects

Decision Explorer 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	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> Specifies the application's domain that defines the application's subtype. Possible values are:</p> <ul style="list-style-type: none"> <li>• Explainability Service</li> </ul> <p>The default value is <code>ExplainabilityService</code>.</p>
Description	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The description of the application subtype definition record.</p>
DeveloperName	<p><b>Type</b> string</p>

Field	Details
	<p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The unique name of the application subtype definition.</p>
Language	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The language of the application subtype definition.</p>
ManageableState	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Indicates the manageable state of the specified component that is contained in a package. Possible values are:</p> <ul style="list-style-type: none"> <li>• beta—Managed-Beta</li> <li>• deleted—Managed-Proposed-Deleted</li> <li>• deprecated—Managed-Proposed-Deprecated</li> <li>• deprecatedEditable—SecondGen-Installed-Deprecated</li> <li>• installed—Managed-Installed</li> <li>• installedEditable—SecondGen-Installed-Editable</li> <li>• released—Managed-Released</li> <li>• unmanaged—Unmanaged</li> </ul>
MasterLabel	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The UI label of the application subtype definition.</p>
NamespacePrefix	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p>

Field	Details
	<b>Description</b> 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 <code>namespacePrefix__componentName</code> 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	<b>Type</b> string  <b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update  <b>Description</b> Specifies the application's domain that defines the business process type definition.  Possible values are: <ul style="list-style-type: none"> <li>• Explainability Service</li> </ul> The default value is <code>ExplainabilityService</code> .
Description	<b>Type</b> string  <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update  <b>Description</b> The description of the business process type definition.

Field	Details
DeveloperName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The unique name of the business process type definition.</p>
Language	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The language of the business process type definition.</p>
ManageableState	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Indicates the manageable state of the specified component that is contained in a package. Possible values are:</p> <ul style="list-style-type: none"> <li>• beta—Managed-Beta</li> <li>• deleted—Managed-Proposed-Deleted</li> <li>• deprecated—Managed-Proposed-Deprecated</li> <li>• deprecatedEditable—SecondGen-Installed-Deprecated</li> <li>• installed—Managed-Installed</li> <li>• installedEditable—SecondGen-Installed-Editable</li> <li>• released—Managed-Released</li> <li>• unmanaged—Unmanaged</li> </ul>
MasterLabel	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The UI label of the business process type definition.</p>
NamespacePrefix	<p><b>Type</b> string</p>

Field	Details
	<b>Properties</b> Filter, Group, Nillable, Sort
	<b>Description</b> 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 <code>namespacePrefix__componentName</code> 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()`, `describeObjects()`, `query()`, `retrieve()`, `update()`, `upsert()`

## Supported REST API Methods

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

## Fields

Field	Details
ActionLogSchemaType	<b>Type</b> string
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	<b>Description</b> Specifies the action log schema type of the application. Possible values are: <ul style="list-style-type: none"> <li>• <code>ExpressionSet</code></li> <li>• <code>Other</code></li> </ul> The default value is <code>Other</code> .
ApplicationSubtypeId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update


Field	Details
	<p><b>Description</b> Specifies the subtype of the associated application for which the explainability log is generated.</p> <p>This is a relationship field.</p> <p><b>Relationship Name</b> ApplicationSubtype</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> ApplicationSubtypeDefinition</p>
ApplicationType	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> Specifies the type of the application for which the explainability log is generated.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>PublicSector</li> </ul> <p> <b>Note:</b> 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.</p>
Description	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The description of the explainability action definition record.</p>
DeveloperName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The unique name of the explainability action definition record.</p>
IsInternal	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p><b>Description</b></p> <p>Indicates whether the explainability action definition record is created internally by the Salesforce platform (<code>true</code>) or not (<code>false</code>).</p> <p>The default value is <code>false</code>.</p>
Language	<p><b>Type</b></p> <p>picklist</p> <p><b>Properties</b></p> <p>Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b></p> <p>The language of the explainability action definition.</p>
ManageableState	<p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b></p> <p>Indicates the manageable state of the specified component that is contained in a package.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>beta</code>—Managed-Beta</li> <li>• <code>deleted</code>—Managed-Proposed-Deleted</li> <li>• <code>deprecated</code>—Managed-Proposed-Deprecated</li> <li>• <code>deprecatedEditable</code>—SecondGen-Installed-Deprecated</li> <li>• <code>installed</code>—Managed-Installed</li> <li>• <code>installedEditable</code>—SecondGen-Installed-Editable</li> <li>• <code>released</code>—Managed-Released</li> <li>• <code>unmanaged</code>—Unmanaged</li> </ul>
MasterLabel	<p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b></p> <p>The UI label of the explainability action definition.</p>
NamespacePrefix	<p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Filter, Group, Nillable, Sort</p>

Field	Details
	<b>Description</b> 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	<b>Type</b> reference <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> The process type of the explainability action definition. This is a relationship field. <b>Relationship Name</b> ProcessType <b>Relationship Type</b> Lookup <b>Refers To</b> 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	<b>Type</b> string

Field	Details
	<p><b>Properties</b> Create, Nillable, Update</p> <p><b>Description</b> The custom message template that is registered by the application.</p>
ActionSpecification	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Nillable, Update</p> <p><b>Description</b> The explainability specification of the application's action log that's generated at runtime and stored as a JSON file.</p>
DefinitionVersion	<p><b>Type</b> int</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The version of the explainability action definition.</p>
Description	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The description of the explainability action version record.</p>
DeveloperName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The unique name of the explainability action version record.</p>
ExplainabilityActionDefId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The explainability action definition of which this record is one of the versions. This is a relationship field.</p>

Field	Details
	<p><b>Relationship Name</b> ExplainabilityActionDef</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> ExplainabilityActionDef</p>
IsActive	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Indicates whether the explainability action version is active and can be used as a specification in the application's action logs (<code>true</code>) or not (<code>false</code>).  The default value is <code>false</code>.</p>
Language	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The language of the explainability action version.</p>
ManageableState	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Indicates the manageable state of the specified component that is contained in a package. Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>beta</code>—Managed-Beta</li> <li>• <code>deleted</code>—Managed-Proposed-Deleted</li> <li>• <code>deprecated</code>—Managed-Proposed-Deprecated</li> <li>• <code>deprecatedEditable</code>—SecondGen-Installed-Deprecated</li> <li>• <code>installed</code>—Managed-Installed</li> <li>• <code>installedEditable</code>—SecondGen-Installed-Editable</li> <li>• <code>released</code>—Managed-Released</li> <li>• <code>unmanaged</code>—Unmanaged</li> </ul>

Field	Details
MasterLabel	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The UI label of the explainability action version.</p>
NamespacePrefix	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> 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 <code>namespacePrefix__componentName</code> notation.</p>

## Decision Explainer 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](#).

### [ApplicationSubtypeDefinition](#)

Represents a subtype of an application. Create application subtype definitions to define the types of applications used in your Decision Explainer entities.

### [BusinessProcessTypeDefinition](#)

Represents the definition of the business process type within an application domain.

### [ExplainabilityActionDefinition](#)

Represents the definition of the explainability action log that is generated by the associated application's action.

### [ExplainabilityActionVersion](#)

Represents the explainability action version of the explainability action log that is generated by the associated application's action.

## ApplicationSubtypeDefinition

Represents a subtype of an application. Create application subtype definitions to define the types of applications used in your Decision Explainer entities.



**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

ApplicationSubtypeDefinition components have the suffix `.applicationSubtypeDefinition` and are stored in the `applicationSubtypeDefinition` folder.

Version

ApplicationSubtypeDefinition components are available in API version 57.0 and later.

Fields

Field Name	Description
applicationUsageType	<p><b>Field Type</b></p> <p>AppDomainUsageType (enumeration of type string)</p> <p><b>Description</b></p> <p>Required.</p> <p>The application's domain that defines the application's subtype.</p> <p>Possible value:</p> <ul style="list-style-type: none"><li>• ExplainabilityService</li></ul>
description	<p><b>Field Type</b></p> <p>string</p> <p><b>Description</b></p> <p>The description of the application subtype definition.</p>
masterLabel	<p><b>Field Type</b></p> <p>string</p> <p><b>Description</b></p> <p>Required.</p> <p>A user-friendly name for ApplicationSubtypeDefinition, which is defined when the ApplicationSubtypeDefinition is created.</p>

Declarative Metadata Sample Definition

The following is an example of an ApplicationSubtypeDefinition component.

```
<?xml version="1.0" encoding="UTF-8"?>
<ApplicationSubtypeDefinition
  xmlns="http://soap.sforce.com/2006/04/metadata">
```

```
<masterLabel>ApplicationSubtype1</masterLabel>
<description>Application Subtype 1</description>
<applicationUsageType>ExplainabilityService</applicationUsageType>
</ApplicationSubtypeDefinition>
```


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>ApplicationSubtypeDefinition</name>
  </types>
  <version>57.0</version>
</Package>
```

BusinessProcessTypeDefinition

Represents the definition of the business process type within an application domain.

 **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

BusinessProcessTypeDefinition components have the suffix .businessProcessTypeDefinition and are stored in the businessProcessTypeDefinition folder.

Version

BusinessProcessTypeDefinition components are available in API version 57.0 and later.

Fields

Field Name	Description
applicationUsageType	<p><b>Field Type</b></p> <p>AppDomainUsageType (enumeration of type string)</p> <p><b>Description</b></p> <p>Required.</p> <p>The application's domain that defines the business process type definition.</p> <p>Possible value:</p> <ul style="list-style-type: none"><li>ExplainabilityService</li></ul>

Field Name	Description
description	<b>Field Type</b> string <b>Description</b> The description of the business process type definition.
masterLabel	<b>Field Type</b> string <b>Description</b> Required. A user-friendly name for BusinessProcessTypeDefinition, which is defined when the BusinessProcessTypeDefinition is created.

## Declarative Metadata Sample Definition

The following is an example of a BusinessProcessTypeDefinition component.

```
<?xml version="1.0" encoding="UTF-8"?>

<BusinessProcessTypeDefinition
  xmlns="http://soap.sforce.com/2006/04/metadata">
  <masterLabel>ProcessType1</masterLabel>
  <description>Process Type 1</description>
  <applicationUsageType>ExplainabilityService</applicationUsageType>
</BusinessProcessTypeDefinition>
```

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>BusinessProcessTypeDefinition</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.

## ExplainabilityActionDefinition

Represents the definition of the explainability action log that is generated by the associated application's action.

 **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

ExplainabilityActionDefinition components have the suffix `.explainabilityActionDefinition` and are stored in the `explainabilityActionDefinition` folder.

## Version

ExplainabilityActionDefinition components are available in API version 57.0 and later.

## Fields

Field Name	Description
<code>actionLogSchemaType</code>	<p><b>Field Type</b></p> <p>ActionLogSchemaType (enumeration of type string)</p> <p><b>Description</b></p> <p>Required.</p> <p>The action log schema type of the application.</p> <p>Possible values are:</p> <ul style="list-style-type: none"><li>• ExpressionSet</li><li>• Other</li></ul>
<code>applicationSubtype</code>	<p><b>Field Type</b></p> <p>string</p> <p><b>Description</b></p> <p>Required.</p> <p>The subtype of the associated application for which the explainability log is generated.</p>
<code>applicationType</code>	<p><b>Field Type</b></p> <p>EASAppType (enumeration of type string)</p> <p><b>Description</b></p> <p>Required.</p> <p>The type of the application for which the explainability log is generated.</p> <p>Possible values are:</p> <ul style="list-style-type: none"><li>• ActionableEventOrch (Available in API version 61.0 and later.)</li><li>• HealthCloud</li></ul>

Field Name	Description
	<ul style="list-style-type: none"> <li>• <code>IndustriesDroOrderProcess</code> (Available in API version 61.0 and later.)</li> <li>• <code>IndustryServiceExcellence</code></li> <li>• <code>Loyalty</code></li> <li>• <code>OmniAnalytics</code> (Available in API version 61.0 and later.)</li> <li>• <code>PublicSector</code></li> </ul>
<code>description</code>	<p><b>Field Type</b> string</p> <p><b>Description</b> The description of the explainability action definition record.</p>
<code>internal</code>	<p><b>Field Type</b> boolean</p> <p><b>Description</b> Required.  Indicates whether the explainability action definition record is created internally by the Salesforce platform (<code>true</code>) or not (<code>false</code>).  The default value is <code>false</code>.</p>
<code>masterLabel</code>	<p><b>Field Type</b> string</p> <p><b>Description</b> Required.  A user-friendly name for <code>ExplainabilityActionDefinition</code>, which is defined when the <code>ExplainabilityActionDefinition</code> is created.</p>
<code>processType</code>	<p><b>Field Type</b> string</p> <p><b>Description</b> Required.  The process type of the explainability action definition.</p>

## Declarative Metadata Sample Definition

The following is an example of an `ExplainabilityActionDefinition` component.

```
<?xml version="1.0" encoding="UTF-8"?>

<ExplainabilityActionDefinition
  xmlns="http://soap.sforce.com/2006/04/metadata">
```

```

<masterLabel>ActionDefinition1</masterLabel>
<description>Action Definition 1</description>
<applicationType>PublicSector</applicationType>
<applicationSubtype>testType</applicationSubtype>
<processType>testType</processType>
<actionLogSchemaType>ExpressionSet</actionLogSchemaType>
<internal>true</internal>
</ExplainabilityActionDefinition>

```

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>ApplicationSubtypeDefinition</name>
  </types>
  <types>
    <members>*</members>
    <name>BusinessProcessTypeDefinition</name>
  </types>
  <types>
    <members>*</members>
    <name>ExplainabilityActionDefinition</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](#).

## ExplainabilityActionVersion

Represents the explainability action version of the explainability action log that is generated by the associated application's action.



**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

`ExplainabilityActionVersion` components have the suffix `.explainabilityActionVersion` and are stored in the `explainabilityActionVersion` folder.

## Version

ExplainabilityActionVersion components are available in API version 57.0 and later.

## Fields

Field Name	Description
actionLogMessageTemplate	<b>Field Type</b> string <b>Description</b> The custom message template that is registered by the application.
actionSpecification	<b>Field Type</b> string <b>Description</b> Required. The explainability specification of the application's action log that's generated at runtime and stored as a JSON file.
active	<b>Field Type</b> boolean <b>Description</b> Required. Indicates whether the explainability action version is active and can be used as a specification in the application's action logs.
definitionVersion	<b>Field Type</b> int <b>Description</b> Required. The version of the explainability action definition.
description	<b>Field Type</b> string <b>Description</b> The description of the explainability action version record.
explainabilityActionDef	<b>Field Type</b> string <b>Description</b> Required.

Field Name	Description
	The explainability definition of the explainability action log that's generated by the associated application's action.
masterLabel	<b>Field Type</b> string <b>Description</b> Required. A user-friendly name for ExplainabilityActionVersion, which is defined when the ExplainabilityActionVersion is created.

## Declarative Metadata Sample Definition

The following is an example of an ExplainabilityActionVersion component.

```
<?xml version="1.0" encoding="UTF-8"?>
<ExplainabilityActionVersion
  xmlns="http://soap.sforce.com/2006/04/metadata">
  <masterLabel>ActionVersion1</masterLabel>
  <explainabilityActionDef>ActionDef</explainabilityActionDef>
  <description>Version Description</description>
  <actionSpecification>Test action specification</actionSpecification>
  <active>false</active>
  <actionLogMessageTemplate>Test template</actionLogMessageTemplate>
  <definitionVersion>1</definitionVersion>
</ExplainabilityActionVersion>
```

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>ApplicationSubtypeDefinition</name>
  </types>
  <types>
    <members>*</members>
    <name>BusinessProcessTypeDefinition</name>
  </types>
  <types>
    <members>*</members>
    <name>ExplainabilityActionDefinition</name>
  </types>
  <types>
    <members>*</members>
    <name>ExplainabilityActionVersion</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](#).

## Einstein Relationship Insights

---

Explore interconnected relationships between people and companies on the web. Einstein Relationship Insights helps discover critical relationships by exploring disparate data sources, from unstructured web pages, and structured information like Salesforce records.

### [Einstein Relationship Insights Standard Objects](#)

Use the standard objects to view the result of the sentiment analysis.

## Einstein Relationship Insights Standard Objects

Use the standard objects to view the result of the sentiment analysis.

### [BusinessAlert](#)

Represents information about insight notifications that Einstein Relationship Insights explores, such as news mentions, job updates, and relationships. This object is available in API version 57.0 and later.

### [BusinessAlertStatus](#)

Represents information about the read status of an insight alert. This object is available in API version 57.0 and later.

## BusinessAlert

Represents information about insight notifications that Einstein Relationship Insights explores, such as news mentions, job updates, and relationships. 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

The BusinessAlert object is available only if the ERI Growth User or ERI Starter User license is enabled.

## Fields

Field	Details
AlertData	<p><b>Type</b> textarea</p> <p><b>Properties</b> Create, Nillable, Update</p> <p><b>Description</b> Data associated with each alert.</p>
AlertRecordId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The record that's referenced by the insight alert.  This field is a polymorphic relationship field.</p> <p><b>Relationship Name</b> AlertRecord</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> Account, Asset, AuthorizationForm, AuthorizationFormConsent, AuthorizationFormDataUse, AuthorizationFormText, BusinessBrand, CommSubscription, CommSubscriptionChannelType, CommSubscriptionConsent, Contact, ContactPointAddress, ContactPointConsent, ContactPointEmail, ContactPointPhone, ContactPointTypeConsent, ContentVersion, Customer, DataUseLegalBasis, DataUsePurpose, EmailMessage, EngagementChannelType, Idea, Image, Individual, Lead, Location, Opportunity, PartyConsent, Pricebook2, Product2, ProfileSkill, QuickText, Recommendation, Scorecard, ScorecardMetric, Seller, SocialPersona, SocialPost, Solution, VideoCall, WorkBadgeDefinition  In addition to the listed standard object fields, this field can refer to custom objects as well,</p>
AlertType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> Specifies the type of insight alert.  Possible values are:</p> <ul style="list-style-type: none"> <li>• JOB_CHANGE</li> <li>• NEWS</li> <li>• RELATIONSHIP</li> </ul>

Field	Details
	The default value is NEWS.
CurrentDesignation	<b>Type</b> string <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> The current designation that's related to the job alert.
CurrentEmployer	<b>Type</b> string <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> The name of the current employer that's related to the job alert.
LastReferencedDate	<b>Type</b> dateTime <b>Properties</b> Filter, Nillable, Sort <b>Description</b> The timestamp when the current user last viewed a record related to this alert record.
LastViewedDate	<b>Type</b> dateTime <b>Properties</b> Filter, Nillable, Sort <b>Description</b> The timestamp when the current user last viewed this alert.
Name	<b>Type</b> string <b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort <b>Description</b> The name of the alert record.
OwnerId	<b>Type</b> reference <b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	<b>Description</b> The ID of the user who owns the record. This field is a polymorphic relationship field. <b>Relationship Name</b> Owner <b>Relationship Type</b> Lookup <b>Refers To</b> Group, User
PreviousDesignation	<b>Type</b> string <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> The previous designation that's related to the job alert.
PreviousEmployer	<b>Type</b> string <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> The name of the previous employer that's related to the job alert.

## BusinessAlertStatus

Represents information about the read status of an insight alert. 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

The BusinessAlertStatus object is available only if the ERI Growth User or ERI Starter User license is enabled.

## Fields

Field	Details
BusinessAlertId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> The insight alert related to the status.  This field is a relationship field.</p> <p><b>Relationship Name</b> BusinessAlert</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> BusinessAlert</p>
IsAlertRead	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> Indicates whether the insight alert is read by the user (true) or not (false).  The default value is <code>false</code>.</p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p><b>Description</b> Specifies the activation status of the insight alert.</p>
UserId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The ID of the user who is associated with the alert.  This field is a relationship field.</p> <p><b>Relationship Name</b> User</p>

Field	Details
	<b>Relationship Type</b> Lookup
	<b>Refers To</b> User

## Einstein Standard Invocable Actions

Integrate custom deep-learning models into CRM workflows with Einstein Invocable Actions.

### [Initiate Natural Language Processing Action](#)

Create a record for the AI natural language processing result and initiate text processing by using the service specified in the related record.

SEE ALSO:

[REST API Developer Guide: Invocable Actions Standard](#)

[Actions Developer Guide: Introducing Actions](#)

## Initiate Natural Language Processing Action

Create a record for the AI natural language processing result and initiate text processing by using the service specified in the related record.

This object is available in API version 60.0 and later.

## Special Access Rules

To access the Initiate Natural Language Processing action, enable either IndustriesNLPInsightsAddOn or both IndustriesContractsAIAddOn and ContractsAIAddOn.

## Supported REST HTTP Methods

### URI

`/services/data/v60.0/actions/standard/initiateNaturalLangProcessing`

### Formats

JSON, XML

### HTTP Methods

GET, HEAD, POST

### Authentication

Authorization: Bearer ***token***

## Inputs

Input	Details
referenceRecordId	<b>Type</b> string <b>Description</b> Required. The record ID with the text field that's processed by an AI natural language process request.
referenceRecordTextField	<b>Type</b> string <b>Description</b> Required. The text field that's processed by an AI natural language process request.
serviceDetailsList	<b>Type</b> string <b>Description</b> Required. A comma-delimited list containing the details of services that are used to process AI natural language process requests.  The possible values are: <ul style="list-style-type: none"><li>• Amazon_Comprehend_Keyphrase_Extraction</li><li>• Amazon_Comprehend_Entity_Extraction</li><li>• OpenAIClauseExtraction</li><li>• OpenAIEntityExtraction</li><li>• GenAI_Assessment_Questions_Extraction</li></ul>

## Outputs

Input	Details
aiNaturalLangProcRsltIdsList	<b>Type</b> string <b>Description</b> A comma-delimited list containing the IDs of AI Natural Language Process Result records that store the result of the natural language process requests.

## Example

Sample Request

## JSON Request Body

```
{
  "inputs": [
    {
      "referenceRecordId": "a00SB000003Z2LPYA0",
      "referenceRecordTextField": "Vehicle__c.Comments__c",
      "serviceDetailsList": {
        "serviceDetails": [
          {
            "serviceName": "Amazon_Comprehend_Keyphrase_Extraction",
            "configurationApiName": "AWS_Keyphrase_Extraction"
          }
        ]
      }
    }
  ]
}
```

## Sample Response

## JSON Response Body

```
[
  {
    "actionName": "initiateNaturalLangProcessing",
    "errors": null,
    "isSuccess": true,
    "outputValues": {
      "aiNaturalLangProcRsultIds": {
        "aiNaturalLangProcessResultIds": [
          "7NPSB0000000g8v4AA"
        ]
      }
    },
    "version": 1
  }
]
```

Sample Error message when referenceRecordId is not provided

## JSON Error Body

```
[ {
  "errorCode" : "METHOD_NOT_ALLOWED",
  "message" : "HTTP Method 'POST' not allowed. Allowed are HEAD,GET"
} ]
```

## Engagement

---

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.

### [Engagement Connect APIs](#)

With the Engagement Connect REST APIs, you can create, delete, and get Engagement Interaction, Engagement Attendee, and Engagement Topic records.

### [Apex Reference](#)

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

### [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.

## 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
EndTime	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The date and time when the engagement with the attendee ends.</p>
EngagementId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> Required. The engagement interaction, messaging session, or voice call that's related to the attendee.  This field is a relationship field.</p> <p><b>Relationship Name</b> Engagement</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> EngagementInteraction, MessagingSession, VoiceCall</p>
ExternalAttendeeId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p><b>Description</b></p> <p>The external user related to the engagement, such as the customer or partner. To avoid an error, either this field or the <code>InternalAttendeeId</code> field must have a value.</p> <p>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 <code>Who</code> relationship field of a <code>Task</code> can be a <code>Contact</code> or a <code>Lead</code>.</p> <p><b>Relationship Name</b></p> <p>ExternalAttendee</p> <p><b>Relationship Type</b></p> <p>Lookup</p> <p><b>Refers To</b></p> <p>Account, Contact, Lead</p>
InternalAttendeeId	<p><b>Type</b></p> <p>reference</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b></p> <p>The internal user related to the engagement, such as the call center agent. To avoid an error, either this field or the <code>ExternalAttendeeId</code> field must have a value.</p> <p>This field is a relationship field.</p> <p><b>Relationship Name</b></p> <p>InternalAttendee</p> <p><b>Relationship Type</b></p> <p>Lookup</p> <p><b>Refers To</b></p> <p>User</p>
IsAuthenticated	<p><b>Type</b></p> <p>boolean</p> <p><b>Properties</b></p> <p>Create, Defaulted on Create, Filter, Group, Sort, Update</p> <p><b>Description</b></p> <p>Indicates whether the initiating attendee of the engagement interaction was authenticated through interactive voice response (IVR) or Web channel (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p> <p>This field is available in API version 56.0 and later.</p>
IsVerified	<p><b>Type</b></p> <p>boolean</p>

Field	Details
	<p><b>Properties</b> Create, Defaulted on Create, Filter, Group, Sort, Update</p> <p><b>Description</b> Indicates whether the initiating attendee of the engagement interaction was verified (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.  This field is available in API version 56.0 and later.</p>
LastReferencedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp when the current user last accessed this record, a record related to this record, or a list view.</p>
LastViewedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp when the current user last viewed this record or list view. If this value is null, the user might have only accessed this record or list view (<code>LastReferencedDate</code>) but not viewed it.</p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p><b>Description</b> The name of the Engagement Attendee record.</p>
OwnerId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> The Salesforce ID of the person who owns this engagement attendee record.  This field is a relationship field.</p> <p><b>Relationship Name</b> Owner</p>

Field	Details
	<b>Relationship Type</b> Lookup <b>Refers To</b> User
Role	<b>Type</b> picklist <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> The role of an engagement attendee. This field is available in API version 56.0 and later. Possible values are: <ul style="list-style-type: none"> <li>OnBehalf</li> <li>Self</li> </ul>
StartDateTime	<b>Type</b> dateTime <b>Properties</b> Create, Filter, Nillable, Sort, Update <b>Description</b> Required. The date and time when the engagement with the attendee starts.
VerificationTime	<b>Type</b> dateTime <b>Properties</b> Create, Filter, Nillable, Sort, Update <b>Description</b> 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
<code>AttendeeVerificationTime</code>	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The time when the attendee was verified for the engagement interaction. You can manually set this time. If <code>isAttendeeVerified</code> is set to true, then if you don't manually set this time, it's set based on the current system date and time.</p>
<code>CommunicationChannel</code>	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> Required. The communication channel through which engagement interaction occurs. Possible values are:</p> <ul style="list-style-type: none"> <li>• In Person</li> <li>• Video Call</li> <li>• Voice Call</li> <li>• Web Chat</li> </ul> <p>Your Salesforce admin can define new field values or update the existing field values.</p>

Field	Details
ContextId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> 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.</p> <p>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.</p> <p><b>Relationship Name</b> Context</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> ServiceAppointment, Visit</p>
Duration	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> 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.</p>
EndTime	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The date and time when the engagement interaction ends.</p>
ExternalIdentifier	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p><b>Description</b> The unique external identifier of the engagement interaction.</p>

Field	Details
InitiatingAttendeeId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> 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.</p> <p><b>Relationship Name</b> InitiatingAttendee</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> Account, Contact, Lead</p>
IsAttendeeAuthenticated	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> Indicates whether the initiating attendee of the engagement interaction has been authenticated through IVR or Web channel (<code>true</code>) or not (<code>false</code>).  The default value is <code>false</code>.</p>
IsAttendeeVerified	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> Indicates whether the initiating attendee of the engagement interaction has been verified (<code>true</code>) or not (<code>false</code>).  The default value is <code>false</code>.</p>
LastReferencedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp when the current user last accessed this record, a record related to this record, or a list view.</p>

Field	Details
LastViewedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp when the current user last viewed this record or list view. If this value is null, the user might have only accessed this record or list view (<code>LastReferencedDate</code>) but not viewed it.</p>
MappedState	<p><b>Type</b> picklist</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Specifies the state of the engagement interaction that changes when the status of the interaction gets updated.  Possible values are:</p> <ul style="list-style-type: none"> <li>Completed</li> <li>InProgress</li> <li>New</li> </ul> <p>The default value is <code>New</code>.</p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p><b>Description</b> The name of the Engagement Interaction record.</p>
OwnerId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> The Salesforce ID of the person who owns this engagement interaction record.  This field is a relationship field.</p> <p><b>Relationship Name</b> Owner</p> <p><b>Relationship Type</b> Lookup</p>

Field	Details
	<b>Refers To</b> User
PhoneNumber	<b>Type</b> phone <b>Properties</b> Create, Filter, Nillable, Sort, Update <b>Description</b> 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	<b>Type</b> string <b>Properties</b> Create, Filter, Nillable, Sort, Update <b>Description</b> 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	<b>Type</b> reference <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> The identifier of the record type object. Available in API version 62.0 and later. <b>Relationship Name</b> RecordType <b>Refers To</b> RecordType
Sentiment	<b>Type</b> picklist <b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update <b>Description</b> The analyzed sentiment of the engagement interaction attendee about the engagement interaction. Possible values are: <ul style="list-style-type: none"> <li>Negative</li> <li>Neutral</li> <li>Positive</li> </ul>

Field	Details
	Your Salesforce admin can define new field values or update the existing field values.
StartDateTime	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> Required. The date and time when the engagement interaction starts.</p>
Status	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> Specifies the status of the engagement interaction, which also impacts the interaction state. Possible values are:</p> <ul style="list-style-type: none"> <li>Completed</li> <li>In Progress</li> <li>New</li> </ul> <p>Your Salesforce admin can define new field values or update the existing field values.</p>
Type	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> Specifies the type of interaction that was initiated by the attendee. Possible values are:</p> <ul style="list-style-type: none"> <li>Inbound</li> <li>Outbound</li> </ul> <p>Your Salesforce admin can define new field values or update the existing field values.</p>

## 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	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> 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.</p> <p><b>Relationship Name</b> Engagement</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> EngagementInteraction, MessagingSession, VoiceCall</p>
InteractionSummary	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The summary of the engagement interaction. This field is available in API version 56.0 and later.</p>

Field	Details
LastReferencedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp when the current user last accessed this record, a record related to this record, or a list view.</p>
LastViewedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp when the current user last viewed this record or list view. If this value is null, the user might have only accessed this record or list view (LastReferencedDate) but not viewed it.</p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, idLookup, Sort, Update</p> <p><b>Description</b> Required. The name of the engagement topic record.</p>
OwnerId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> The Salesforce ID of the person who owns this engagement topic record.  This field is a relationship field.</p> <p><b>Relationship Name</b> Owner</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> User</p>
ParentTopicId	<p><b>Type</b> reference</p>

Field	Details
	<p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The parent engagement topic record that's associated with this engagement topic.  This field is a relationship field.</p> <p><b>Relationship Name</b> ParentTopic</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> EngagementTopic</p>
ProcessFailureReason	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> 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.</p>
ProcessName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The name of the process executed during the engagement interaction.</p>
ProcessStatus	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> Specifies the current status of the process that's executed during the engagement interaction.  Possible values are:</p> <ul style="list-style-type: none"> <li>Cancelled</li> <li>Completed</li> <li>Failed</li> <li>Initiated</li> </ul> <p>Your Salesforce administrator can define new or update the existing field values.</p>

Field	Details
ProcessType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The type of the process executed during the engagement interaction. Possible values are:</p> <ul style="list-style-type: none"> <li>• Flow</li> <li>• OmniScript</li> <li>• QuickAction</li> </ul>
RelatedPersonId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> 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.</p> <p><b>Relationship Name</b> RelatedPerson</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> Account, Contact, Lead</p>
TopicId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> 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.</p> <p><b>Relationship Name</b> Topic</p> <p><b>Relationship Type</b> Lookup</p>

Field	Details
	<b>Refers To</b> 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
<a href="#">engagementInteraction</a>	<a href="#">Engagement Interaction Create Input</a>	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	<a href="#">Engagement Custom Fields Input[]</a>	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 ( <code>true</code> ) or not ( <code>false</code> ).	Required	55.0
isVerified	Boolean	Indicates whether the initiating attendee of the engagement interaction was verified ( <code>true</code> ) or not ( <code>false</code> ).	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

Name	Type	Description	Required or Optional	Available Version
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
<code>attendeeAuthenticated</code>	Boolean	Indicates whether the initiating attendee of an engagement interaction was authenticated through interactive voice response (IVR) or Web channel ( <code>true</code> ) or not ( <code>false</code> ).  The default value is <code>false</code> .	Optional	55.0
<code>attendeeVerificationTime</code>	String	The time when the attendee was verified for an engagement interaction. You can manually set this time. If <code>isAttendeeVerified</code> is set to <code>true</code> , then if you don't manually set this time, it is set based on the current system date and time.	Optional	55.0
<code>attendeeVerified</code>	Boolean	Indicates whether the initiating attendee of an engagement interaction was verified ( <code>true</code> ) or not ( <code>false</code> ).	Required	55.0
<code>communicationChannel</code>	String	The communication channel through which an engagement interaction occurred. Possible values are: <ul style="list-style-type: none"> <li>• In-Person</li> <li>• Video Call</li> <li>• Voice Call</li> <li>• Web Chat</li> </ul> You can set custom values.	Required	55.0
<code>contextId</code>	String	The ID of the record that's considered as the context for an engagement interaction.	Optional	55.0

Name	Type	Description	Required or Optional	Available Version
		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.		
customFieldsList	<a href="#">Engagement Custom Fields Input[]</a>	The custom fields and their values for engagement interactions.	Optional	56.0
endTime	String	The date and time when an engagement interaction ended.	Optional	55.0
engagementAttendees	<a href="#">Engagement Attendee Create Input[]</a>	Create engagement attendee records.	Optional	55.0
engagementTopics	<a href="#">Engagement Topic Create Input[]</a>	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	<p>The state of an engagement interaction that changes when the status of the interaction gets updated. Possible values are:</p> <ul style="list-style-type: none"> <li>Completed</li> <li>In Progress</li> <li>New</li> </ul> <p>The default value is <code>New</code>.</p>	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	<p>The sentiment of an engagement interaction attendee about the engagement interaction. Possible values are:</p> <ul style="list-style-type: none"> <li>Negative</li> </ul>	Optional	55.0

Name	Type	Description	Required or Optional	Available Version
		<ul style="list-style-type: none"> <li>Neutral</li> <li>Positive</li> </ul> <p>You can set custom values.</p>		
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	<p>The type of interaction that was initiated by the attendee. Possible values are:</p> <ul style="list-style-type: none"> <li>Inbound Interaction</li> <li>Outbound Interaction</li> </ul> <p>You can set custom values.</p>	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	<a href="#">Engagement Custom Fields Input[]</a>	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

Name	Type	Description	Required or Optional	Available Version
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: <ul style="list-style-type: none"> <li>• Canceled</li> <li>• Completed</li> <li>• Failed</li> <li>• Initiated</li> </ul>	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

## 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	<a href="#">Engagement Custom Fields Output</a>	The list of custom fields.	Small, 56.0	56.0
endTime	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
startTime	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	<a href="#">Engagements ID Create Output</a>	Details about the engagement interaction, the engagement attendee, and the engagement topic.	Small, 55.0	55.0
status	<a href="#">Engagement Status Output</a>	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	<a href="#">Engagement Interaction Details Output</a>	The details of an engagement interaction.	Small, 55.0	55.0
status	<a href="#">Engagement Status Output</a>	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	<a href="#">Engagements ID Output[]</a>	The engagement attendee details.	Small, 55.0	55.0
engagementTopics	<a href="#">Engagements ID Output[]</a>	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

Property Name	Type	Description	Filter Group and Version	Available Version
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	<a href="#">Engagement Custom Fields Output</a>	The list of custom fields.	Small, 56.0	56.0
duration	String	The duration of an engagement interaction.	Small, 55.0	55.0
endTime	String	The end date and time of an engagement interaction.	Small, 55.0	55.0
engagementAttendees	<a href="#">Engagement Attendee Details Output[]</a>	The engagement attendee details.	Small, 55.0	55.0
engagementTopics	<a href="#">Engagement Topic Output[]</a>	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.  <b>Note:</b> 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
startTime	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	<a href="#">Engagement Custom Fields Output</a>	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
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.

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
<del>customFieldsList</del> <a href="#">CustomFieldsList</a>	<del>String</del> <a href="#">CustomFieldsList</a>	The custom fields and their values for engagement attendees.	Optional	56.0
endTime	String	The date and time when the engagement with the attendee ends.	Optional	55.0
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 <code>InternalAttendeeId</code> 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 <code>ExternalAttendeeId</code> 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 ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> .		55.0
isVerified	Boolean	Indicates whether the initiating attendee of the engagement interaction was verified ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> .		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: <ul style="list-style-type: none"> <li>• <code>OnBehalf</code></li> <li>• <code>Self</code></li> </ul>		56.0
startTime	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
<del>attendeeAuthenticated</del>	Boolean	Indicates whether the initiating attendee of an engagement interaction was authenticated through interactive voice response (IVR) or Web channel ( <code>true</code> ) or not ( <code>false</code> ).  The default value is <code>false</code> .	Optional	55.0
<del>attendeeVerificationTime</del>	String	The time when the attendee was verified for an engagement interaction. You can manually set this time. If <code>isAttendeeVerified</code> is set to <code>true</code> , then if you don't manually set this time, it is set based on the current system date and time.	Optional	55.0
<del>attendeeVerified</del>	Boolean	Indicates whether the initiating attendee of an engagement interaction was verified ( <code>true</code> ) or not ( <code>false</code> ).	Required	55.0
<del>communicationChannel</del>	String	The communication channel through which an engagement interaction occurred. Possible values are: <ul style="list-style-type: none"> <li>• In Person</li> <li>• Video Call</li> <li>• Voice Call</li> <li>• Web Chat</li> </ul> You can set custom values.	Required	55.0
<del>contextId</del>	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
<del>customFieldsList</del> <a href="#">Click to expand</a>	<del>String</del>	The custom fields and their values for engagement interactions.	Optional	56.0
<del>endDateTime</del>	String	The date and time when an engagement interaction ended.	Optional	55.0
<del>engagementAttendees</del> <a href="#">Click to expand</a>	<del>String</del>	Create engagement attendee records.		55.0

Property	Type	Description	Required or Optional	Available Version
engagementTopics	Set of EngagementTopicId	Create engagement topic records.		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	<p>The state of an engagement interaction that changes when the status of the interaction gets updated. Possible values are:</p> <ul style="list-style-type: none"> <li>Completed</li> <li>In Progress</li> <li>New</li> </ul> <p>The default value is New.</p>	Optional	55.0
phoneNumber	String	<p>The phone number of the caller who initiates an engagement interaction.</p> <p> <b>Note:</b> The phone number is used to get the context of the previous engagement.</p>	Optional	57.0
reason	String	The reason for an engagement as stated by a customer during the engagement interaction.	Optional	56.0
sentiment	String	<p>The sentiment of an engagement interaction attendee about the engagement interaction. Possible values are:</p> <ul style="list-style-type: none"> <li>Negative</li> <li>Neutral</li> <li>Positive</li> </ul> <p>You can set custom values.</p>	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	<p>The type of interaction that was initiated by the attendee. Possible values are:</p> <ul style="list-style-type: none"> <li>Inbound Interaction</li> <li>Outbound Interaction</li> </ul>	Optional	55.0

Property	Type	Description	Required or Optional	Available Version
		You can set custom values.		

ConnectApi.EngagementTopicCreateInput

Input representation to create an engagement topic record.

Property	Type	Description	Required or Optional	Available Version
customFieldsList	<a href="#">CustomFieldInfo</a>	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: <ul style="list-style-type: none"> <li>• Canceled</li> <li>• Completed</li> <li>• Failed</li> <li>• Initiated</li> </ul>	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

Property	Type	Description	Required or Optional	Available Version
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	<a href="#">EngagementInteractionRequest</a>	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	<a href="#">ConnectApi.EngagementAttendeeDetailsOutput</a>	The list of custom fields.	56.0
endTime	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
startTime	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	<a href="#">ConnectApi.EngagementsCreateOutput</a>	Details about the engagement interaction, the engagement attendee, and the engagement topic.	55.0
status	<a href="#">ConnectApi.EngagementStatusOutput</a>	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	<a href="#">ConnectApi.EngagementInteractionDetailOutput</a>	The details of an engagement interaction.	55.0
status	<a href="#">ConnectApi.EngagementStatusOutput</a>	The status of an engagement.	55.0

## ConnectApi.EngagementsIdCreateOutput


Output representation to create an engagement interaction.

Property Name	Type	Description	Available Version
engagementAttendees	<a href="#">ConnectApi.EngagementAttendeeOutput</a>	The engagement attendee details.	55.0
engagementTopics	<a href="#">ConnectApi.EngagementTopicOutput</a>	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	<a href="#">ConnectApi.EngagementCustomFieldOutput</a>	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	<a href="#">ConnectApi.EngagementAttendeeOutput</a>	The engagement attendee details.	55.0
engagementTopics	<a href="#">ConnectApi.EngagementTopicOutput</a>	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

Property Name	Type	Description	Available Version
ownerId	String	The owner ID of an engagement interaction.	55.0
phoneNumber	String	The phone number of the caller who initiates an engagement interaction.	57.0
		 <b>Note:</b> The phone number is used to get the context of the previous engagement.	
reason	String	The reason of the EngagementInteraction.	56.0
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 <a href="#">Click Here to See the Fields and Values</a>	Object	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

Property	Type	Description	Required or Optional	Available Version
processStatus	String	Specifies the current status of a process that's executed during the engagement interaction. Possible values are: <ul style="list-style-type: none"> <li>• Canceled</li> <li>• Completed</li> <li>• Failed</li> <li>• Initiated</li> </ul>	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.EngagementTopicOutput

Output representation to create an engagement topic record.

Property Name	Type	Description	Available Version
customFields	<a href="#">ConnectApi.EngagementTopicOutput.CustomFields</a>	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

Property Name	Type	Description	Available Version
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](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 985>

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.SUBJECT,
          params : { recordId : result.returnValue.runApex }
        });
      } else {
        throw new Error('Unable to make a call. Contact your admin.');
```

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.');
```

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;
```

## Group Membership and Households

Create and define groups of individuals, such as households. Connect individuals and organizations to each other and track their relationships.

### [Group Membership and Households Data Model](#)

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

### [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.

### [Group Membership and Households Business APIs](#)

Use business APIs to define and manage party relationship groups of individuals or trusts.

#### SEE ALSO:

[Salesforce Help: Group Membership and Households](#)

#### EDITIONS

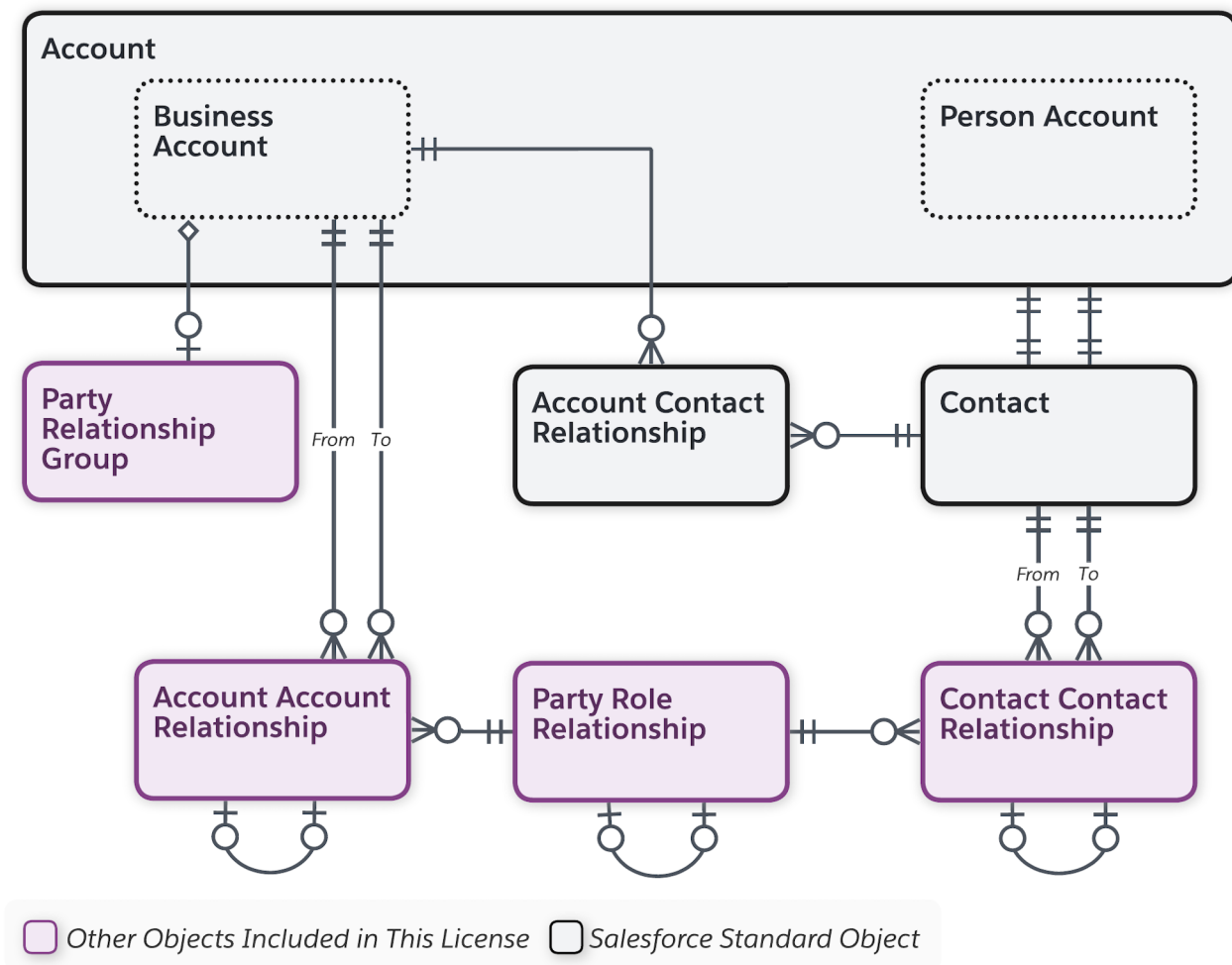
Available in: Lightning Experience. [View product and edition availability.](#)

## 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	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> ID of the account associated with this account account relationship.  This field is a relationship field.</p> <p><b>Relationship Name</b> Account</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> Account</p>
EndDate	<p><b>Type</b> date</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The date when the relationship ends.</p>
HierarchyType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p>

Field	Details
	<p><b>Description</b></p> <p>Specifies the hierarchy between accounts that are related. For example, an account is related to another account as a parent, peer, or child.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• Child</li> <li>• Parent</li> <li>• Peer</li> </ul> <p>The default value is <code>Parent</code>.</p>
IsActive	<p><b>Type</b></p> <p>boolean</p> <p><b>Properties</b></p> <p>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b></p> <p>Indicates whether the account is actively involved with the related account.</p> <p>The default value is <code>false</code>.</p>
LastReferencedDate	<p><b>Type</b></p> <p>dateTime</p> <p><b>Properties</b></p> <p>Filter, Nillable, Sort</p> <p><b>Description</b></p> <p>The timestamp when the current user last accessed this record, a record related to this record, or a list view.</p>
LastViewedDate	<p><b>Type</b></p> <p>dateTime</p> <p><b>Properties</b></p> <p>Filter, Nillable, Sort</p> <p><b>Description</b></p> <p>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 (&lt;parname&gt;LastReferencedDate&lt;/parname&gt;) but not viewed it.</p>
Name	<p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p><b>Description</b></p> <p>Name of the account account relationship.</p>

Field	Details
OwnerId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> ID of the owner of this object. This field is a polymorphic relationship field.</p> <p><b>Relationship Name</b> Owner</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> Group, User</p>
PartyRoleRelationId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The relationship between two accounts. This field is a relationship field.</p> <p><b>Relationship Name</b> PartyRoleRelation</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> PartyRoleRelation</p>
RelatedAccountId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The related account in the relationship. This field is a relationship field.</p> <p><b>Relationship Name</b> RelatedAccount</p> <p><b>Relationship Type</b> Lookup</p>

Field	Details
	<b>Refers To</b> Account
RelatedInverseRecordId	<b>Type</b> reference <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> The record that specifies the inverse relationship between the accounts. This field is a relationship field. <b>Relationship Name</b> RelatedInverseRecord <b>Relationship Type</b> Lookup <b>Refers To</b> AccountAccountRelation
StartDate	<b>Type</b> date <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> 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	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> Lookup to the Account object. This field is a relationship field.</p> <p><b>Relationship Name</b> Account</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> Account</p>
ContactId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> Lookup to the Contact object. This field is a relationship field.</p> <p><b>Relationship Name</b> Contact</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> Contact</p>

Field	Details
DataRollupCategories	<p><b>Type</b> multipicklist</p> <p><b>Properties</b> Create, Filter, Nillable, Update</p> <p><b>Description</b> Specifies the categories in which the data associated with a group is aggregated.</p>
EndDate	<p><b>Type</b> date</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The date a relationship between a contact and account ended. Use with the Start Date to keep a history of the relationship.</p>
IsActive	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> Indicates whether relationship is active (true) or not (false).  The default value is <code>false</code>.</p>
IsDirect	<p><b>Type</b> boolean</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Sort</p> <p><b>Description</b> Indicates whether relationship is direct (true) or not (false).  The default value is <code>false</code>.</p>
IsIncludedInGroup	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> Indicates whether the data of a group or a business account is included in the Household (true) or not (false).  The default value is <code>false</code>.</p>

Field	Details
IsPrimaryGroup	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> Indicates whether the group is a primary group for the member (yes) or not (no). The default value is <code>false</code>.</p>
IsPrimaryMember	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> Indicates whether the member is a primary contact of a group (true) or not (false). The default value is <code>false</code>.</p>
Roles	<p><b>Type</b> multipicklist</p> <p><b>Properties</b> Create, Filter, Nillable, Update</p> <p><b>Description</b> The contact's participating role in the account. Possible values are:</p> <ul style="list-style-type: none"><li>• Daughter</li><li>• Father</li><li>• Husband</li><li>• Mother</li><li>• Other</li><li>• Son</li><li>• Wife</li></ul>
StartDate	<p><b>Type</b> date</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The date a relationship between a contact and account began. Use with the End Date to keep a history of the relationship</p>

## Associated Objects

This object has the following associated objects. If the API version isn'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	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> ID of the account associated with this contact contact relationship. This field is a relationship field.</p> <p><b>Relationship Name</b> Contact</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> Contact</p>
EndDate	<p><b>Type</b> date</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The date when the relationship ends.</p>
HierarchyType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p>

Field	Details
	<p><b>Description</b></p> <p>Indicates the type of association to determine the hierarchy of relationship between the two parties.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• Child</li> <li>• Parent</li> <li>• Peer</li> </ul> <p>The default value is <code>Parent</code>.</p>
IsActive	<p><b>Type</b></p> <p>boolean</p> <p><b>Properties</b></p> <p>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b></p> <p>Indicates whether the contact is actively involved with the related contact.</p> <p>The default value is <code>false</code>.</p>
LastReferencedDate	<p><b>Type</b></p> <p>dateTime</p> <p><b>Properties</b></p> <p>Filter, Nillable, Sort</p> <p><b>Description</b></p> <p>The timestamp when the current user last accessed this record, a record related to this record, or a list view.</p>
LastViewedDate	<p><b>Type</b></p> <p>dateTime</p> <p><b>Properties</b></p> <p>Filter, Nillable, Sort</p> <p><b>Description</b></p> <p>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 (&lt;parname&gt;LastReferencedDate&lt;/parname&gt;) but not viewed it.</p>
Name	<p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p><b>Description</b></p> <p>Name of the contact contact relationship.</p>

Field	Details
OwnerId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> ID of the owner of this object. This field is a polymorphic relationship field.</p> <p><b>Relationship Name</b> Owner</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> Group, User</p>
PartyRoleRelationId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The relationship between two contacts. This field is a relationship field.</p> <p><b>Relationship Name</b> PartyRoleRelation</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> PartyRoleRelation</p>
RelatedContactId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The related contact in the relationship. This field is a relationship field.</p> <p><b>Relationship Name</b> RelatedContact</p> <p><b>Relationship Type</b> Lookup</p>

Field	Details
	<b>Refers To</b> Contact
RelatedInverseRecordId	<b>Type</b> reference <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> The record that specifies the inverse relationship between the contacts. This field is a relationship field. <b>Relationship Name</b> RelatedInverseRecord <b>Relationship Type</b> Lookup <b>Refers To</b> ContactContactRelation
StartDate	<b>Type</b> date <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> 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	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> The parent account associated with the party relationship group. This field is a relationship field.</p> <p><b>Relationship Name</b> Account</p> <p><b>Relationship Type</b> Master-detail</p> <p><b>Refers To</b> Account (the master object)</p>
Category	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Specifies the category of the party relationship group. Possible values are:</p> <ul style="list-style-type: none"> <li>Extended Family</li> <li>Meals together</li> <li>Staying under same roof</li> </ul>
Description	<p><b>Type</b> textarea</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<b>Description</b> The description of the party relationship group.
EndDate	<b>Type</b> date <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> The end date associated with the party relationship group.
GroupIncome	<b>Type</b> currency <b>Properties</b> Create, Filter, Nillable, Sort, Update <b>Description</b> The total income of the party relationship group.
GroupSize	<b>Type</b> int <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> The number of active members associated with the party relationship group.
LastReferencedDate	<b>Type</b> dateTime <b>Properties</b> Filter, Nillable, Sort <b>Description</b> The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	<b>Type</b> dateTime <b>Properties</b> Filter, Nillable, Sort <b>Description</b> The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate is not null, the user accessed this record or list view indirectly.
Name	<b>Type</b> string

Field	Details
	<p><b>Properties</b> Create, Filter, Group, idLookup, Sort, Update</p> <p><b>Description</b> The name of the party relationship group.</p>
PrimaryAddress	<p><b>Type</b> address</p> <p><b>Properties</b> Filter, Nillable</p> <p><b>Description</b> The primary address of the party relationship group.</p>
PrimaryCity	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The primary city of the party relationship group.</p>
PrimaryCountry	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The primary country of the party relationship group.</p>
PrimaryGeocodeAccuracy	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The level of accuracy of a location's geographical coordinates compared with its physical address. A geocoding service typically provides this value based on the party relationship group's latitude and longitude coordinates.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• Address</li> <li>• Block</li> <li>• City</li> <li>• County</li> <li>• ExtendedZip—Extended Zip</li> <li>• NearAddress—Near Address</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>• Neighborhood</li> <li>• State</li> <li>• Street</li> <li>• Unknown</li> <li>• Zip</li> </ul>
PrimaryLatitude	<p><b>Type</b> double</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> Used with Longitude to specify the precise geolocation of the party relationship group. Acceptable values are numbers between –90 and 90 with up to 15 decimal places.</p>
PrimaryLongitude	<p><b>Type</b> double</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> Used with Latitude to specify the precise geolocation of the party relationship group. Acceptable values are numbers between –180 and 180 with up to 15 decimal places.</p>
PrimaryPostalCode	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The primary postal code of the party relationship group.</p>
PrimaryState	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The primary state of the party relationship group.</p>
PrimaryStreet	<p><b>Type</b> textarea</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The primary street of the party relationship group.</p>

Field	Details
StartDate	<p><b>Type</b> date</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The start date associated with the party relationship group.</p>
Status	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The status of the party relationship group. Possible values are:</p> <ul style="list-style-type: none"> <li>• Active</li> <li>• Inactive</li> </ul> <p>The default value is Active.</p>
Subtype	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The subclassification of the party relationship group type. Possible values are:</p> <ul style="list-style-type: none"> <li>• Extension Household</li> <li>• Nuclear Household</li> <li>• Three Person Household</li> </ul>
Type	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The type of the party relationship group. Possible values are:</p> <ul style="list-style-type: none"> <li>• Group</li> <li>• Household</li> </ul> <p>The default value is Group.</p>

## Associated Objects

This object has the following associated objects. If the API version isn'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	<b>Type</b> dateTime  <b>Properties</b> Filter, Nillable, Sort  <b>Description</b> The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	<b>Type</b> dateTime  <b>Properties</b> Filter, Nillable, Sort  <b>Description</b> The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced ( <code>LastReferencedDate</code> ) and not viewed.
Name	<b>Type</b> string  <b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort

Field	Details
	<b>Description</b> Name of the party role relationship.
OwnerId	<b>Type</b> reference <b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update <b>Description</b> ID of the owner of this object. This field is a polymorphic relationship field. <b>Relationship Name</b> Owner <b>Relationship Type</b> Lookup <b>Refers To</b> Group, User
RelatedInverseRecordId	<b>Type</b> reference <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> The record that specifies the inverse relationship between the roles. This field is a relationship field. <b>Relationship Name</b> RelatedInverseRecord <b>Relationship Type</b> Lookup <b>Refers To</b> PartyRoleRelation
RelatedRoleName	<b>Type</b> string <b>Properties</b> Create, Filter, Group, Sort, Update <b>Description</b> The role that's related to another role in the relationship.
RelationshipObjectName	<b>Type</b> picklist

Field	Details
	<p><b>Properties</b> Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> The object that's associated with the relationship. Possible values are:</p> <ul style="list-style-type: none"> <li>Account_Account_Relationship—Account Account Relationship</li> <li>Contact_Contact_Relationship—Contact Contact Relationship</li> </ul> <p>The default value is Account_Account_Relationship.</p>
RoleName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The name of the role in the relationship.</p>
ShouldCreaInversRoleAuto	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort</p> <p><b>Description</b> Indicates whether a role record should be created automatically for the relationship (true) or not (false). The default value is <code>false</code>.</p>

## Associated Objects

This object has the following associated objects. If the API version isn'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": "003xx000004WhHQA0",
        "roles": "Decision Maker",
        "relations": [
          {
            "roleRelationId": "0z1xx0000000001AAA",
            "relatedContactId": "003xx000004WhJ2AAK",
            "startDate": "2023-06-14T00:00:00.000Z"
          }
        ]
      }
    ]
  },
  "externalMember": {
    "records": [
      {
        "contactId": "003xx000004WhJ2AAK",
        "roles": "Decision Maker"
      }
    ]
  },
  "relatedGroup": {
    "relations": [
      {
        "type": "Direct",
        "roleRelationId": "0z1xx0000000001dAAA",
        "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	<a href="#">Member Record Input[]</a>	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

Name	Type	Description	Required or Optional	Available Version
member	<a href="#">Member Record Input[]</a>	Member details of the party relationship group being created.	Required	58.0
related Account	<a href="#">Account Relation Input[]</a>	Data of the account that's related to the party relationship group being created.	Optional	58.0
relatedGroup	<a href="#">Account Relation Input[]</a>	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":"0z1RM0000000014YAA",
            "relatedContactId":"003RM00000895N9YAI",
            "isActive":false
        },
        {
            "ccrId":"0zmRM000000002NYAQ",
            "roleRelationId":"0z1RM00000004CAaYAM",
            "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": "0zlRM00000004C9mYAE",
      "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": "0zlRM00000004C9mYAE",
      "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
account Detail	<a href="#">Account Input</a>	Details of the merged account.	Required	58.0
external Member	<a href="#">Member Record Input</a>	Details of the external members of a party relationship group.	Optional	58.0

Name	Type	Description	Required or Optional	Available Version
groupDetail	<a href="#">Group Input</a>	Details of the party relationship group, such as category, address, group size, group income, and custom fields.	Required	58.0
member	<a href="#">Member Record Input</a>	Details of the party relationship group members.	Required	58.0
primary AccountId	String	ID of the primary account.	Required	58.0
related Account	<a href="#">Account Relation Input</a>	Details of the related account.	Optional	58.0
relatedGroup	<a href="#">Account Relation Input</a>	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

**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=<0wKFM0000000001n2AA>,<0wKFM0000000004n2YY>`**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/${001FM000005aVSIYA2}/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	<a href="#">Address Input</a>	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
numberOfEmployees	String	Number of employees working at the company represented by the account.	Optional	58.0

Name	Type	Description	Required or Optional	Available Version
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	<a href="#">Address Input</a>	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
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": "0z1xx000000001dAAA",
      "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": "0z1xx000000001dGAC",
        "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
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 ( <code>true</code> ) or not ( <code>false</code> ).	Optional	58.0
related AccountId	String	Record ID of the related account. If the account relationship type is direct, then the related account ID is required.	Optional	58.0
related Inverse RecordId	String	Record ID of the related inverse relationship record.	Optional	58.0
roleRelation Id	String	Record ID of the party role relationship.	Required	58.0
startDate	String	Date when the account relationship starts.	Optional	58.0
type	String	Type of account relationship, such as a direct or indirect relationship. The default	Optional	58.0

Name	Type	Description	Required or Optional	Available Version
		value is <code>false</code> . If the <code>relatedInverseRecordId</code> property is specified, then the relationship type is indirect.		

## 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": "0z1xx0000000001AAA",
          "relatedContactId": "003xx000004WhJ2AAK",
          "startDate": "2023-06-14T00:00:00.000Z"
        }
      ]
    },
    "externalMember": {
      "records": [
        {
          "contactId": "003xx000004WhJ2AAK",
          "roles": "Decision Maker"
        }
      ]
    },
    "relatedGroup": {
      "relations": [
        {
          "type": "Direct",
          "roleRelationId": "0z1xx0000000001dAAA",
          "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	<a href="#">Member Record Input[]</a>	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	<a href="#">Member Record Input[]</a>	Member details of the party relationship group being created.	Required	58.0
relatedAccount	<a href="#">Account Relation Input[]</a>	Data of the account that's related to the party relationship group being created.	Optional	58.0

Name	Type	Description	Required or Optional	Available Version
relatedGroup	<a href="#">Account Relation Input[]</a>	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
partyRelation GroupId	String	Record ID of the party relationship group. Record ID is optional when creating a group and required when merging groups.	Required	58.0

Name	Type	Description	Required or Optional	Available Version
primary Address	<a href="#">Address Input</a>	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: <ul style="list-style-type: none"> <li>Active</li> <li>Inactive</li> </ul>	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: <ul style="list-style-type: none"> <li>Group</li> <li>Household</li> </ul>	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": "0zlRM00000004CAaYAM",
                "relatedContactId": "003RM00000895N9FYAY",
                "isActive": true
            }
        ]
    }
]
},
"externalMember": {
    "records": [
        {
            "acrId": "07kRM000000KYHpYAO",
            "contactId": "003RM00000895N9FYAY",
            "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":"0zlRM00000004C9mYAE",
                "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":"0zlRM00000004C9mYAE",
                "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": "0zlRM00000004C9mYAE",
    "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": "0zoRM00000004CDPYA2",
    "roleRelationId": "0zlRM00000004C9mYAE",
    "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": "0zoRM00000004CBFYA2",
    "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": "0zoRM00000004CAuYAM",
      "roleRelationId": "0zlRM00000004C9mYAE",
      "accountId": "001RM000005aGUcYAM",
      "relatedAccountId": "001RM000005ZLa5YAG",
      "isActive": true,
      "hierarchyType": "Peer",
      "customFields": {
        "CF3__c": false,

```

```

        "CF4__c": "A;C"
      }
    },
    {
      "aarId": "0zoRM00000004CB4YAM",
      "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	<a href="#">Account Input</a>	Details of the merged account.	Required	58.0
external Member	<a href="#">Member Record Input</a>	Details of the external members of a party relationship group.	Optional	58.0
groupDetail	<a href="#">Group Input</a>	Details of the party relationship group, such as category, address, group size, group income, and custom fields.	Required	58.0
member	<a href="#">Member Record Input</a>	Details of the party relationship group members.	Required	58.0
primary AccountId	String	ID of the primary account.	Required	58.0

Name	Type	Description	Required or Optional	Available Version
relatedAccount	<a href="#">Account Relation Input</a>	Details of the related account.	Optional	58.0
relatedGroup	<a href="#">Account Relation Input</a>	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 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": "0z1xx0000000001AAA",
          "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 <code>acrId</code> 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

Name	Type	Description	Required or Optional	Available Version
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 ( <code>true</code> ) or not ( <code>false</code> ).	Optional	58.0
endDate	Date	Date when the member relationship ends.	Optional	58.0
relations	<a href="#">Relationships Input</a>	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": "0z1RM0000004CAaYAM",
    "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

Name	Type	Description	Required or Optional	Available Version
hierarchyType	String	Hierarchy among the contacts that are related.	Optional	58.0
isActive	Boolean	Indicates whether the relationship is active ( <code>true</code> ) or not ( <code>false</code> ).	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 ( <code>true</code> ) or not ( <code>false</code> ).	Small, 58.0	58.0
message	String	Message of the API request.	Small, 58.0	58.0

Property Name	Type	Description	Filter Group and Version	Available Version
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

## Identity Verification

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.

[Identity Verification Connect APIs](#)

Use the Identity Verification Connect APIs to validate the identity of a representative or customer.

[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.

[Identity Verification Metadata API](#)

Create and edit identity verification configuration using a Metadata API.

[Identity Verification Tooling API Objects](#)

Use Tooling API objects to create and update identity verification configuration.

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	<a href="#">Identity Ver Form Field Input[]</a>	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	<a href="#">Identity Verf Form Field Input[]</a>	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 ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> .	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

Property Name	Type	Description	Filter Group and Version	Available Version
displayRecordDetails	<a href="#">Identity Verif Form Display Record</a> on page 1049	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	<a href="#">Identity Verif Form Field List Output</a> on page 1050	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 ( <code>true</code> ) or not ( <code>false</code> ).	Small, 58.0	58.0
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
<a href="#">IdentityVerificationFields</a>	<a href="#">Identity Verif Form Field Output[]</a> on page 1049	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	<b>Type</b> string  <b>Properties</b> Create, Filter, Group, Sort, Update  <b>Description</b> The developer name of a record.
Language	<b>Type</b> picklist  <b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update  <b>Description</b> The languages in which translation of record labels is supported.

Field	Details
	<p>Possible values are:</p> <ul style="list-style-type: none"> <li>• da—Danish</li> <li>• de—German</li> <li>• en_US—English</li> <li>• es—Spanish</li> <li>• es_MX—Spanish (Mexico)</li> <li>• fi—Finnish</li> <li>• fr—French</li> <li>• it—Italian</li> <li>• ja—Japanese</li> <li>• ko—Korean</li> <li>• nl_NL—Dutch</li> <li>• no—Norwegian</li> <li>• pt_BR—Portuguese (Brazil)</li> <li>• ru—Russian</li> <li>• sv—Swedish</li> <li>• th—Thai</li> <li>• zh_CN—Chinese (Simplified)</li> <li>• zh_TW—Chinese (Traditional)</li> </ul>
MasterLabel	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The label of the Identity Verification Process Definition record.</p>
NamespacePrefix	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> 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 <b>namespacePrefix__componentName</b> notation.</p> <p>The namespace prefix can have one of the following values:</p> <ul style="list-style-type: none"> <li>• 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</li> </ul>

Field	Details
	<p>installed managed package. This field's value is the namespace prefix of the Developer Edition organization of the package developer.</p> <ul style="list-style-type: none"> <li>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.</li> </ul>
SearchLayoutType	<p><b>Type</b></p> <p>picklist</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b></p> <p>The display layout of the search component.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>Stack</li> <li>Tab</li> </ul> <p> <b>Note:</b> As of API version 54.0, Tab isn't supported.</p>

## 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	<p><b>Type</b></p> <p>reference</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b></p> <p>The ID of the Apex class.</p> <p>This is a relationship field.</p>

Field	Details
	 <b>Note:</b> As of API version 54.0, this isn't supported.
	<b>Relationship Name</b> ApexClass
	<b>Relationship Type</b> Lookup
	<b>Refers To</b> ApexClass
DataSourceType	<b>Type</b> picklist
	<b>Properties</b> Create, Filter, Group, Restricted picklist, Sort, Update
	<b>Description</b> The source type of the data. Possible values are: <ul style="list-style-type: none"> <li>• External</li> <li>• Salesforce</li> </ul>
DeveloperName	<b>Type</b> string
	<b>Properties</b> Create, Filter, Group, Sort, Update
	<b>Description</b> The developer name of a record.
DisplayRecordFieldName	<b>Type</b> string
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> 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	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Sort, Update
	<b>Description</b> The label of the relevant Identity Verification Process Definition record.

Field	Details
	<p>This is a relationship field.</p> <p><b>Relationship Name</b> IdentityVerificationProcDef</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> IdentityVerificationProcDef</p>
IsActive	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> Indicates whether the record is active (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
Language	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The languages in which translation of record labels is supported. Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>da</code>—Danish</li> <li>• <code>de</code>—German</li> <li>• <code>en_US</code>—English</li> <li>• <code>es</code>—Spanish</li> <li>• <code>es_MX</code>—Spanish (Mexico)</li> <li>• <code>fi</code>—Finnish</li> <li>• <code>fr</code>—French</li> <li>• <code>it</code>—Italian</li> <li>• <code>ja</code>—Japanese</li> <li>• <code>ko</code>—Korean</li> <li>• <code>nl_NL</code>—Dutch</li> <li>• <code>no</code>—Norwegian</li> <li>• <code>pt_BR</code>—Portuguese (Brazil)</li> <li>• <code>ru</code>—Russian</li> <li>• <code>sv</code>—Swedish</li> <li>• <code>th</code>—Thai</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>zh_CN—Chinese (Simplified)</li> <li>zh_TW—Chinese (Traditional)</li> </ul>
LinkIdVerfProcessDetId	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> 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 <code>LinkIdVerfProcessDetId</code> field in the account process detail record to the third process detail record.</p> <p>This field is available in API version 55.0 and later.</p> <p>This field is a relationship field.</p>
MasterLabel	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The label of the Identity Verification Process Detail record.</p>
NamespacePrefix	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> 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 <b>namespacePrefix__componentName</b> notation.</p> <p>The namespace prefix can have one of the following values:</p> <ul style="list-style-type: none"> <li>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.</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>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.</li> </ul>
ObjectName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The name of the object on which the search is performed and data is verified.</p>
OptionalVerifiersMinVerfCount	<p><b>Type</b> int</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The minimum number of additional verifiers that must be checked.</p>
SearchFilter	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Conditions to filter the search results.  For example, if you want to perform the search only on Person Account records, enter <code>isPersonAccount = true</code>.</p>
SearchRecordUniqueIdField	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The field storing the unique identifier of records displayed in the search results.</p>
SearchResultSortBy	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The values that are used to sort the search results.  For example, if you want to sort the results by policy date, enter <code>PolicyDate__c Desc</code>.</p>

Field	Details
SearchSequenceNumber	<p><b>Type</b> int</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The sequence in which the search is performed and the search result is displayed.</p>
SearchType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> The type of search being performed. Possible values are:</p> <ul style="list-style-type: none"> <li>• Object-Based</li> <li>• Text-Based</li> </ul>

## 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	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The custom label for the field that contains the verification data.</p>
DataSourceType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Restricted picklist, Sort, Update</p>

Field	Details
	<p><b>Description</b></p> <p>The source type of the data.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• External</li> <li>• Salesforce</li> </ul>
DeveloperName	<p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Sort, Update</p> <p><b>Description</b></p> <p>The developer name of a record.</p>
FieldDataType	<p><b>Type</b></p> <p>picklist</p> <p><b>Properties</b></p> <p>Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b></p> <p>The type of data stored in an external data source field.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• address</li> <li>• checkbox</li> <li>• currency</li> <li>• dateonly</li> <li>• datetime</li> <li>• email</li> <li>• number</li> <li>• other</li> <li>• percent</li> <li>• phone</li> <li>• picklist</li> <li>• reference</li> <li>• text</li> <li>• timeonly</li> <li>• url</li> </ul>
FieldName	<p><b>Type</b></p> <p>string</p>

Field	Details
	<p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The label of the field that contains the verification data based on the selected field type.</p>
FieldType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> The type of field. Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>additionalResultField</code>—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.</li> <li>• <code>optionalVerifier</code>—Displays additional verifiers on the verification screen. <ul style="list-style-type: none"> <li> <b>Note:</b> 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.</li> </ul> </li> <li>• <code>requiredVerifier</code>—Displays required verifiers on the verification screen. <ul style="list-style-type: none"> <li> <b>Note:</b> 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.</li> </ul> </li> <li>• <code>resultField</code>—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. <ul style="list-style-type: none"> <li> <b>Note:</b> 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.</li> </ul> </li> <li>• <code>searchField</code>—Performs object-based search.</li> <li>• <code>searchFilter</code>—Filters search results. When this is set as the field type, specify the field name to filter search results using the <code>FieldName</code> attribute. Both static and dynamic filtering are supported. For example, to search for Contacts whose related Account ID is always 001xx000003GZ4IAAG, set <code>AccountId</code> as the field name and the value of <code>FieldValueFormula</code> 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 <code>FieldName</code> to <code>PolicyHolder</code> and <code>FieldValueFormula</code> to</li> </ul>

Field	Details
	<p>the dynamic value <code>{!SelectedParentRecordId}</code>. This value is available from API version 56.0 and later.</p> <p> <b>Note:</b> You can only use record IDs to dynamically filter search results.</p>
FieldValueFormula	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Stores the formula that's applied to the field value.</p>
IdentityVerificationProcDtlId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The label of the relevant Identity Verification Process Detail record. This is a relationship field.</p> <p><b>Relationship Name</b> IdentityVerificationProcDtl</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> IdentityVerificationProcDtl</p>
IsActive	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> Indicates whether the record is active (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
IsManualInput	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> Indicates whether the user can manually enter the identity verification details (<code>true</code>) or not (<code>false</code>).</p>

Field	Details
	<p>The default value is <code>false</code>.</p> <p>This field is available in API version 58.0 and later.</p>
Language	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The languages in which translation of record labels is supported.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>da</code>—Danish</li> <li>• <code>de</code>—German</li> <li>• <code>en_US</code>—English</li> <li>• <code>es</code>—Spanish</li> <li>• <code>es_MX</code>—Spanish (Mexico)</li> <li>• <code>fi</code>—Finnish</li> <li>• <code>fr</code>—French</li> <li>• <code>it</code>—Italian</li> <li>• <code>ja</code>—Japanese</li> <li>• <code>ko</code>—Korean</li> <li>• <code>nl_NL</code>—Dutch</li> <li>• <code>no</code>—Norwegian</li> <li>• <code>pt_BR</code>—Portuguese (Brazil)</li> <li>• <code>ru</code>—Russian</li> <li>• <code>sv</code>—Swedish</li> <li>• <code>th</code>—Thai</li> <li>• <code>zh_CN</code>—Chinese (Simplified)</li> <li>• <code>zh_TW</code>—Chinese (Traditional)</li> </ul>
MasterLabel	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The label of the Identity Verification Process Field record.</p>
NamespacePrefix	<p><b>Type</b> string</p>

Field	Details
	<p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> 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 <b>namespacePrefix__componentName</b> notation.</p> <p>The namespace prefix can have one of the following values:</p> <ul style="list-style-type: none"> <li>• 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.</li> <li>• 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.</li> </ul>
SequenceNumber	<p><b>Type</b> int</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The sequence number of the field.</p>

## 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
<code>actionType</code>	<code>InvokableActionType</code> (enumeration of type string)	Required. The action type. Additional valid values only for Identity Verification include: <ul style="list-style-type: none"><li><code>saveMemberVerificationSteps</code>—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.</li></ul>

## 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
<code>identityVerificationProcDtls</code>	<b>Field Type</b> <code>IdentityVerificationProcDtl[]</code> <b>Description</b> A list of Identity Verification Process Detail elements.
<code>masterLabel</code>	<b>Field Type</b> string

Field Name	Description
	<b>Description</b> Required. The label of the Identity Verification Process Definition record.
searchLayoutType	<b>Field Type</b> IdentityVerificationSearchLayoutType (enumeration of type string) <b>Description</b> Required. The display layout of the search component. Valid values are: <ul style="list-style-type: none"><li>• Stack</li><li>• Tab</li></ul>

## IdentityVerificationProcDtl

Represents the verification-related details such as search criteria, verification criteria, or the custom apex class.

Field Name	Description
apexClass	<b>Field Type</b> string <b>Description</b> The Apex class that is used to search and verify data in an external system.
dataSourceType	<b>Field Type</b> IdentityVerificationDataSourceType (enumeration of type string) <b>Description</b> Required. The source type of the data. Valid values are: <ul style="list-style-type: none"><li>• External</li><li>• Salesforce</li></ul>
developerName	<b>Field Type</b> string <b>Description</b> 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

Field Name	Description
	letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.
displayRecordFieldName	<b>Field Type</b> string <b>Description</b> 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	<b>Field Type</b> <a href="#">IdentityVerificationProcFld[]</a> <b>Description</b> A list of Identity Verification Process Field elements.
isActive	<b>Field Type</b> boolean <b>Description</b> Indicates whether the record is active ( <code>true</code> ) or not ( <code>false</code> ).
isRetryAllowedAfterLimit	<b>Field Type</b> boolean <b>Description</b> For internal use only.
linkedIdVerfProcessDet	<b>Field Type</b> string <b>Description</b> The record containing the details of the linked identity verification process. Available in API version 58.0 and later.
masterLabel	<b>Field Type</b> string <b>Description</b> Required. The label of the Identity Verification Process Detail record.
objectName	<b>Field Type</b> string <b>Description</b> The name of the object on which the search is performed and data is verified.

Field Name	Description
optionalVerifiersMinVerfCount	<b>Field Type</b> int <b>Description</b> The number of optional verifiers that must be checked.
retryLimit	<b>Field Type</b> int <b>Description</b> For internal use only.
searchFilter	<b>Field Type</b> string <b>Description</b> A comma-separated list of predefined filter conditions that are used to refine the scope of the search.
searchRecordUniqueIdField	<b>Field Type</b> string <b>Description</b> The field storing the unique identifier of a record displayed in the search results.
searchResultSortBy	<b>Field Type</b> string <b>Description</b> The values that are used to sort the search results.
searchSequenceNumber	<b>Field Type</b> int <b>Description</b> Required. The sequence in which the search is performed and the search result is displayed.
searchType	<b>Field Type</b> IdentityVerificationSearchType (enumeration of type string) <b>Description</b> Required. The type of search being performed. Valid values are: <ul style="list-style-type: none"><li>• Object-Based</li><li>• Text-Based</li></ul>

## 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	<b>Field Type</b> string <b>Description</b> The custom label for the field that contains the verification data.
dataSourceType	<b>Field Type</b> IdentityVerificationProcFldDataSourceType (enumeration of type string) <b>Description</b> Required. The source type of the data. Valid values are: <ul style="list-style-type: none"><li>• External</li><li>• Salesforce</li></ul>
developerName	<b>Field Type</b> string <b>Description</b> 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	<b>Field Type</b> IdentityVerificationProcFldFieldDataType (enumeration of type string) <b>Description</b> 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: <ul style="list-style-type: none"><li>• address</li><li>• checkbox</li><li>• currency</li><li>• dateonly</li><li>• datetime</li><li>• email</li></ul>

Field Name	Description
	<ul style="list-style-type: none"> <li>• number</li> <li>• other</li> <li>• percent</li> <li>• phone</li> <li>• picklist</li> <li>• reference</li> <li>• text</li> <li>• timeonly</li> <li>• url</li> </ul>
fieldName	<p><b>Field Type</b> string</p> <p><b>Description</b> 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.</p>
fieldType	<p><b>Field Type</b> IdentityVerificationProcFldFieldType (enumeration of type string)</p> <p><b>Description</b> Required.  Indicates the type of field.  Valid values are:</p> <ul style="list-style-type: none"> <li>• additionalResultField</li> <li>• optionalVerifier</li> <li>• requiredVerifier</li> <li>• resultField</li> <li>• searchField</li> <li>• searchFilter</li> </ul>
fieldValueFormula	<p><b>Field Type</b> string</p> <p><b>Description</b> Stores the formula that is applied to the field value.</p>
isActive	<p><b>Field Type</b> boolean</p> <p><b>Description</b> Indicates whether the record is active (<code>true</code>) or not (<code>false</code>).</p>

Field Name	Description
isManualInput	<p><b>Field Type</b> boolean</p> <p><b>Description</b> Indicates whether the user can manually enter the identity verification details (<code>true</code>) or not (<code>false</code>).  The default value of this field is <code>false</code>.  Available in API version 58.0 and later.</p>
masterLabel	<p><b>Field Type</b> string</p> <p><b>Description</b> Required.  A user-friendly name for Identity Verification Process Field.</p>
sequenceNumber	<p><b>Field Type</b> int</p> <p><b>Description</b> Required.  The sequence number of the field.</p>

## 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>
  </identityVerificationProcDtls>
  <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>

```

```
</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	<b>Type</b> string
	<b>Properties</b> Filter, Group, Sort

Field	Details
	<p><b>Description</b></p> <p>The unique name of the object in the API. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization. Label is <b>Record Type Name</b>. This field is automatically generated, but you can supply your own value if you create the record using the API.</p> <p> <b>Note:</b> When creating large sets of data, always specify a unique <code>DeveloperName</code> for each record. If no <code>DeveloperName</code> is specified, performance may slow while Salesforce generates one for each record.</p>
FullName	<p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Create, Group, Nillable</p> <p><b>Description</b></p> <p>The full name of the associated <code>IdentityVerificationProcDef</code> in Metadata API. The full name can include a namespace prefix.</p> <p>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.</p>
Language	<p><b>Type</b></p> <p>picklist</p> <p><b>Properties</b></p> <p>Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b></p> <p>The languages of the <code>IdentityVerificationProcDef</code>.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>da</code>—Danish</li> <li>• <code>de</code>—German</li> <li>• <code>en_US</code>—English</li> <li>• <code>es</code>—Spanish</li> <li>• <code>es_MX</code>—Spanish (Mexico)</li> <li>• <code>fi</code>—Finnish</li> <li>• <code>fr</code>—French</li> <li>• <code>it</code>—Italian</li> <li>• <code>ja</code>—Japanese</li> <li>• <code>ko</code>—Korean</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>nl_NL—Dutch</li> <li>no—Norwegian</li> <li>pt_BR—Portuguese (Brazil)</li> <li>ru—Russian</li> <li>sv—Swedish</li> <li>th—Thai</li> <li>zh_CN—Chinese (Simplified)</li> <li>zh_TW—Chinese (Traditional)</li> </ul>
ManageableState	<p><b>Type</b> ManageableState enumerated list</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Indicates the manageable state of the specified component that is contained in a package:</p> <ul style="list-style-type: none"> <li>beta</li> <li>deleted</li> <li>deprecated</li> <li>deprecatedEditable</li> <li>installed</li> <li>installedEditable</li> <li>released</li> <li>unmanaged</li> </ul>
MasterLabel	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> The label for IdentityVerificationProcDef.</p>
Metadata	<p><b>Type</b> complexvalue</p> <p><b>Properties</b> Create, Nillable, Update</p> <p><b>Description</b> The IdentityVerificationProcDef's metadata.</p> <p>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.</p>


Field	Details
NamespacePrefix	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> 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 <b><i>namespacePrefix__componentName</i></b> notation.</p> <p>The namespace prefix can have one of the following values:</p> <ul style="list-style-type: none"> <li>• In Developer Edition organizations, the namespace prefix is set to the namespace prefix of the organization for all objects that support it. There is an exception if an object is in an installed managed package. In that case, the object has the namespace prefix of the installed managed package. This field's value is the namespace prefix of the Developer Edition organization of the package developer.</li> <li>• In organizations that are not Developer Edition organizations, <b>NamespacePrefix</b> is only set for objects that are part of an installed managed package. There is no namespace prefix for all other objects.</li> </ul>
SearchLayoutType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Restricted picklist, Sort</p> <p><b>Description</b> The display layout of the search component.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• Stack</li> <li>• Tab</li> </ul> <p> <b>Note:</b> As of API version 56.0, Tab isn't supported.</p>

## 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()`, `describeObjects()`, `query()`, `retrieve()`, `update()`, `upsert()`

## Supported REST API Methods

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


## Fields

Field	Details
<code>DataSourceType</code>	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Restricted picklist, Sort</p> <p><b>Description</b> The source type of the data. Possible values are:</p> <ul style="list-style-type: none"> <li>• External</li> <li>• Salesforce</li> </ul>
<code>DeveloperName</code>	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> The unique name of the object in the API. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization. Label is <b>Record Type Name</b>. This field is automatically generated, but you can supply your own value if you create the record using the API.</p> <p> <b>Note:</b> When creating large sets of data, always specify a unique <code>DeveloperName</code> for each record. If no <code>DeveloperName</code> is specified, performance may slow while Salesforce generates one for each record.</p>
<code>DisplayRecordFieldName</code>	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p>

Field	Details
	<p><b>Description</b></p> <p>The name of the field that contains information about the record that's shown to the user after identity verification is successful.</p> <p>This field is available in API version 58.0 and later.</p>
FullName	<p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Create, Group, Nillable</p> <p><b>Description</b></p> <p>The full name of the associated IdentityVerificationProcDtl in Metadata API. The full name can include a namespaceprefix.</p> <p>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.</p>
IdentityVerificationProcDefId	<p><b>Type</b></p> <p>reference</p> <p><b>Properties</b></p> <p>Filter, Group, Sort</p> <p><b>Description</b></p> <p>The label of the relevant Identity Verification Process Definition record.</p> <p>This field is a relationship field.</p> <p><b>Relationship Name</b></p> <p>IdentityVerificationProcDef</p> <p><b>Relationship Type</b></p> <p>Lookup</p> <p><b>Refers To</b></p> <p>IdentityVerificationProcDef</p>
IsActive	<p><b>Type</b></p> <p>boolean</p> <p><b>Properties</b></p> <p>Defaulted on create, Filter, Group, Sort</p> <p><b>Description</b></p> <p>Indicates whether the record is active (<code>true</code>) or not (<code>false</code>).</p> <p>The default value is <code>false</code>.</p>
Language	<p><b>Type</b></p> <p>picklist</p>

Field	Details
	<p><b>Properties</b> Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> The languages of the IdentityVerificationProcDtl. Possible values are:</p> <ul style="list-style-type: none"> <li>• da—Danish</li> <li>• de—German</li> <li>• en_US—English</li> <li>• es—Spanish</li> <li>• es_MX—Spanish (Mexico)</li> <li>• fi—Finnish</li> <li>• fr—French</li> <li>• it—Italian</li> <li>• ja—Japanese</li> <li>• ko—Korean</li> <li>• nl_NL—Dutch</li> <li>• no—Norwegian</li> <li>• pt_BR—Portuguese (Brazil)</li> <li>• ru—Russian</li> <li>• sv—Swedish</li> <li>• th—Thai</li> <li>• zh_CN—Chinese (Simplified)</li> <li>• zh_TW—Chinese (Traditional)</li> </ul>
LinkIdVerfProcessDetId	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> 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 <code>LinkIdVerfProcessDetId</code> 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.</p>

Field	Details
	<p><b>Relationship Name</b> LinkedIdVerfProcessDet</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> IdentityVerificationProcDtl</p>
ManageableState	<p><b>Type</b> ManageableState enumerated list</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Indicates the manageable state of the specified component that is contained in a package:</p> <ul style="list-style-type: none"> <li>• beta</li> <li>• deleted</li> <li>• deprecated</li> <li>• deprecatedEditable</li> <li>• installed</li> <li>• installedEditable</li> <li>• released</li> <li>• unmanaged</li> </ul>
MasterLabel	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> The label for IdentityVerificationProcDtl.</p>
Metadata	<p><b>Type</b> complexvalue</p> <p><b>Properties</b> Create, Nillable, Update</p> <p><b>Description</b> The IdentityVerificationProcDtl's metadata.</p> <p>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.</p>

Field	Details
NamespacePrefix	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> 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 <b><i>namespacePrefix__componentName</i></b> notation.</p> <p>The namespace prefix can have one of the following values:</p> <ul style="list-style-type: none"> <li>• In Developer Edition organizations, the namespace prefix is set to the namespace prefix of the organization for all objects that support it. There is an exception if an object is in an installed managed package. In that case, the object has the namespace prefix of the installed managed package. This field's value is the namespace prefix of the Developer Edition organization of the package developer.</li> <li>• In organizations that are not Developer Edition organizations, <code>NamespacePrefix</code> is only set for objects that are part of an installed managed package. There is no namespace prefix for all other objects.</li> </ul>
ObjectName	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The name of the object on which the search is performed and data is verified.</p>
OptionalVerifiersMinVerfCount	<p><b>Type</b> int</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The minimum number of additional verifiers that must be checked.</p>
SearchFilter	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> Conditions to filter the search results. For example, if you want to perform the search only on Person Account records, enter <code>isPersonAccount = true</code>.</p> <p> <b>Note:</b> Use the AND operator to enter multiple conditions. The OR operator isn't supported.</p>

Field	Details
SearchRecordUniqueIdField	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The field storing the unique identifier of records displayed in the search results.</p>
SearchResultSortBy	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The values that are used to sort the search results. For example, if you want to sort the results by policy date, enter <code>PolicyDate__c Desc</code>.</p>
SearchSequenceNumber	<p><b>Type</b> int</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> The sequence in which the search is performed and the search result is displayed.</p>
SearchType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Restricted picklist, Sort</p> <p><b>Description</b> The type of search being performed. Possible values are:</p> <ul style="list-style-type: none"> <li>• Object-Based</li> <li>• Text-Based</li> </ul> <p>Text-based search enables users to enter search keywords in the search field. In object-based search, users search for data using available fields.</p>

## 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()`, `describeObjects()`, `query()`, `retrieve()`, `update()`, `upsert()`





### Supported REST API Methods

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

### Fields

Field	Details
<code>DataSourceType</code>	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Restricted picklist, Sort</p> <p><b>Description</b> The source type of the data. Possible values are:</p> <ul style="list-style-type: none"> <li>• External</li> <li>• Salesforce</li> </ul>
<code>DeveloperName</code>	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> The unique name of the object in the API. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization. Label is <b>Record Type Name</b>. This field is automatically generated, but you can supply your own value if you create the record using the API.</p> <p> <b>Note:</b> When creating large sets of data, always specify a unique <code>DeveloperName</code> for each record. If no <code>DeveloperName</code> is specified, performance may slow while Salesforce generates one for each record.</p>

Field	Details
FieldDataType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> The type of data stored in an external data source field. Possible values are:</p> <ul style="list-style-type: none"> <li>• address</li> <li>• checkbox</li> <li>• currency</li> <li>• dateonly</li> <li>• datetime</li> <li>• email</li> <li>• number</li> <li>• other</li> <li>• percent</li> <li>• phone</li> <li>• picklist</li> <li>• reference</li> <li>• text</li> <li>• timeonly</li> <li>• url</li> </ul>
FieldName	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> The label of the field that contains the verification data based on the selected field type.</p>
FieldType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Restricted picklist, Sort</p> <p><b>Description</b> The type of field. Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>additionalResultField</code>—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</li> </ul>

Field	Details
	<p>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.</p> <ul style="list-style-type: none"> <li>• <code>optionalVerifier</code>—Displays additional verifiers on the verification screen. <ul style="list-style-type: none"> <li> <b>Note:</b> 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.</li> </ul> </li> <li>• <code>requiredVerifier</code>—Displays required verifiers on the verification screen. <ul style="list-style-type: none"> <li> <b>Note:</b> 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.</li> </ul> </li> <li>• <code>resultField</code>—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. <ul style="list-style-type: none"> <li> <b>Note:</b> 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.</li> </ul> </li> <li>• <code>searchField</code>—Performs object-based search.</li> <li>• <code>searchFilter</code>—Filters search results. When this is set as the field type, specify the field name to filter search results using the <code>FieldName</code> attribute. Both static and dynamic filtering are supported. For example, to search for Contacts whose related Account ID is always 001xx000003GZ4IAAG, set <code>AccountId</code> as the field name and the value of <code>FieldValueFormula</code> 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 <code>FieldName</code> to <code>PolicyHolder</code> and <code>FieldValueFormula</code> to the dynamic value <code>{!SelectedParentRecordId}</code>. This value is available from API version 56.0 and later. <ul style="list-style-type: none"> <li> <b>Note:</b> You can only use record IDs to dynamically filter search results.</li> </ul> </li> </ul>
<code>FieldValueFormula</code>	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> Stores the formula that's applied to the field value.</p>
<code>FullName</code>	<p><b>Type</b> string</p>

Field	Details
	<p><b>Properties</b> Create, Group, Nillable</p> <p><b>Description</b> The full name of the associated IdentityVerificationProcFld in Metadata API. The full name can include a namespaceprefix.</p> <p>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.</p>
IdentityVerificationProcDtlId	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> The label of the relevant Identity Verification Process Detail record.</p> <p>This field is a relationship field.</p> <p><b>Relationship Name</b> IdentityVerificationProcDtl</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> IdentityVerificationProcDtl</p>
IsActive	<p><b>Type</b> boolean</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Sort</p> <p><b>Description</b> Indicates whether the record is active (<code>true</code>) or not (<code>false</code>).</p> <p>The default value is <code>false</code>.</p>
IsManualInput	<p><b>Type</b> boolean</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Sort</p> <p><b>Description</b> Indicates whether the user can manually enter the identity verification details (<code>true</code>) or not (<code>false</code>).</p> <p>The default value is <code>false</code>.</p> <p>This field is available in API version 58.0 and later.</p>

Field	Details
Language	<p><b>Type</b> picklist</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> The languages in which translation of record labels is supported. Possible values are:</p> <ul style="list-style-type: none"> <li>• da—Danish</li> <li>• de—German</li> <li>• en_US—English</li> <li>• es—Spanish</li> <li>• es_MX—Spanish (Mexico)</li> <li>• fi—Finnish</li> <li>• fr—French</li> <li>• it—Italian</li> <li>• ja—Japanese</li> <li>• ko—Korean</li> <li>• nl_NL—Dutch</li> <li>• no—Norwegian</li> <li>• pt_BR—Portuguese (Brazil)</li> <li>• ru—Russian</li> <li>• sv—Swedish</li> <li>• th—Thai</li> <li>• zh_CN—Chinese (Simplified)</li> <li>• zh_TW—Chinese (Traditional)</li> </ul>
ManageableState	<p><b>Type</b> ManageableState enumerated list</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Indicates the manageable state of the specified component that is contained in a package:</p> <ul style="list-style-type: none"> <li>• beta</li> <li>• deleted</li> <li>• deprecated</li> <li>• deprecatedEditable</li> <li>• installed</li> <li>• installedEditable</li> <li>• released</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>unmanaged</li> </ul>
MasterLabel	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> The label for IdentityVerificationProcFld.</p>
Metadata	<p><b>Type</b> complexvalue</p> <p><b>Properties</b> Create, Nillable, Update</p> <p><b>Description</b> 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.</p>
NamespacePrefix	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> 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 <b><i>namespacePrefix__componentName</i></b> notation.  The namespace prefix can have one of the following values:</p> <ul style="list-style-type: none"> <li>In Developer Edition organizations, the namespace prefix is set to the namespace prefix of the organization for all objects that support it. There is an exception if an object is in an installed managed package. In that case, the object has the namespace prefix of the installed managed package. This field's value is the namespace prefix of the Developer Edition organization of the package developer.</li> <li>In organizations that are not Developer Edition organizations, <b>NamespacePrefix</b> is only set for objects that are part of an installed managed package. There is no namespace prefix for all other objects.</li> </ul>
SequenceNumber	<p><b>Type</b> int</p> <p><b>Properties</b> Filter, Group, Sort</p>

Field	Details
	<b>Description</b> The sequence number of the field.

## Intelligent Document Reader

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.

### [Apex Reference](#)

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

### [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.

### [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](#).

### [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](#).

### [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.

## 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 document 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 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	<b>Type</b> reference

Field	Details
	<p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> ID of the content document associated with the OCR document scan result. This field is a relationship field.</p> <p><b>Relationship Name</b> ContentDocument</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> ContentDocument</p>
ContentVersionId	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> ID of the content document associated with the OCR document scan result. This field is a relationship field.</p> <p><b>Relationship Name</b> ContentDocument</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> ContentDocument</p>
DocumentTypeId	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Nillable, Update</p> <p><b>Description</b> The document type of the OCR'd 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.</p>
ErrorMessage	<p><b>Type</b> textarea</p> <p><b>Properties</b> Create, Nillable, Update</p> <p><b>Description</b> The message with information about the failure of OCR API calls during extraction.</p>

Field	Details
ExtractedItemData	<p><b>Type</b> textarea</p> <p><b>Properties</b> Nillable</p> <p><b>Description</b> 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.</p>
ExtractedValues	<p><b>Type</b> textarea</p> <p><b>Properties</b> Nillable</p> <p><b>Description</b> The information extracted from the document.  This field is encryptable with Salesforce Platform Encryption.</p>
ExtractedRawData	<p><b>Type</b> textarea</p> <p><b>Properties</b> Nillable</p> <p><b>Description</b> A JSON string from the OCR service response containing data extracted from the document in a raw format.</p>
LastReferencedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp when the current user last accessed this record, a record related to this record, or a list view.</p>
LastViewedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp when the current user last viewed this record or list view. If this value is null, the user might have only accessed this record or list view (<code>LastReferencedDate</code>) but not viewed it.</p>

Field	Details
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, idLookup, Sort, Update</p> <p><b>Description</b> Name of the OCR document scan result.</p>
OcrService	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> The name of the OCR service that extracts information from the document and maps it to the Salesforce object.  Possible values are:</p> <ul style="list-style-type: none"><li>• AMAZON_TEXTTRACT</li><li>• AMAZON_TEXTTRACT_ANALYZED_ID—Available in API version 57.0 and later.</li><li>• PDF_DOCX_EXTRACT_TEXT</li></ul>
OcrStatus	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> Status of the extraction and mapping of information from the document field.  Possible values are:</p> <ul style="list-style-type: none"><li>• ERROR</li><li>• OCR_ENQUEUE</li><li>• SUCCESS</li></ul>
PageNumber	<p><b>Type</b> int</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort</p> <p><b>Description</b> The number of the page in the document in which the extracted value is available.</p>
Rotation	<p><b>Type</b> int</p>

Field	Details
	<b>Properties</b> Filter, Group, Nillable, Sort
	<b>Description</b> 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()`, `describeObjects()`, `query()`, `retrieve()`, `update()`, `upsert()`

## Fields

Field	Details
ApplicationType	<b>Type</b> picklist
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	<b>Description</b> The application associated with the OCR sample document. Possible values are: <ul style="list-style-type: none"> <li>• <code>EinsteinDocumentReader</code></li> <li>• <code>Industries</code></li> </ul> The default value is <code>Industries</code> .
ContentAssetId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update

Field	Details
	<p><b>Description</b> ID of the content asset associated with the OCR sample document. This field is a relationship field.</p> <p><b>Relationship Name</b> ContentAsset</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> ContentAsset</p>
DeveloperName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> <b>Description</b> 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.</p> <p> <b>Note:</b> When creating large sets of data, always specify a unique <code>DeveloperName</code> for each record. If no <code>DeveloperName</code> is specified, performance slows down while Salesforce generates one for each record.</p>
DocumentHeight	<p><b>Type</b> double</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The normalized height of the document page assuming 1.0 as the fixed width for all the documents.</p>
DocumentSignature	<p><b>Type</b> textarea</p> <p><b>Properties</b> Create, Nillable, Update</p> <p><b>Description</b> 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</p>

Field	Details
	<p>the several specific samples associated with a single template. Such classification is necessary for supporting key-less values in non-fixed documents.</p>
DocumentTypeId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The ID of the document type associated with the OCR sample document. This field is a relationship field.</p> <p><b>Relationship Name</b> DocumentType</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> DocumentType</p>
Language	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The combined language and locale ISO code, which controls the language of the OCR sample document.</p>
MasterLabel	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The label for the OCR sample document. This display value is the internal label that doesn't get translated.</p>
NamespacePrefix	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> For managed packages, this field is the namespace prefix assigned to the package. For unmanaged packages, this field is blank.</p>

## 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()`, `describeObjects()`, `query()`, `retrieve()`, `update()`, `upsert()`

### Fields

Field	Details
CellColumnNumber	<p><b>Type</b> int</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> 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.</p>
CellColumnSpanValue	<p><b>Type</b> int</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> 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.</p>
CellRowNumber	<p><b>Type</b> int</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> 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.</p>
CellRowSpanValue	<p><b>Type</b> int</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> 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.</p>

Field	Details
FieldLabelMaxX	<p><b>Type</b> double</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> A normalized coordinate representing the right edge of the bounding box of the key.</p>
FieldLabelMaxY	<p><b>Type</b> double</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> A normalized coordinate representing the bottom edge of the bounding box of the key.</p>
FieldLabelMinX	<p><b>Type</b> double</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> A normalized coordinate representing the left edge of the bounding box of the key.</p>
FieldLabelMinY	<p><b>Type</b> double</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> A normalized coordinate representing the top edge of the bounding box of the key.</p>
FieldValueMaxY	<p><b>Type</b> double</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> A normalized coordinate representing the bottom edge of the bounding box of the value.</p>
IsAutoExtracted	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p>

Field	Details
	<p><b>Description</b></p> <p>Indicates whether the OCR sample document field is auto-extracted by the OCR service (<code>true</code>) or not (<code>false</code>). Available in API version 57.0 and later.</p> <p>The default value is <code>false</code>.</p>
ItemType	<p><b>Type</b></p> <p>picklist</p> <p><b>Properties</b></p> <p>Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b></p> <p>The type of item associated with the OCR sample document field. Available in API version 56.0 and later.</p> <p>Possible value is <code>TABLE</code>.</p>
KeyContent	<p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b></p> <p>Content in a particular area of the document.</p>
OcrSampleDocumentId	<p><b>Type</b></p> <p>reference</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Sort</p> <p><b>Description</b></p> <p>ID of the OCR sample document with the field. Available in API version 56.0 and later.</p> <p>This field is a relationship field.</p> <p><b>Relationship Name</b></p> <p>OcrSampleDocument</p> <p><b>Relationship Type</b></p> <p>Lookup</p> <p><b>Refers To</b></p> <p>OcrSampleDocument</p>
OcrSampleDocumentPageId	<p><b>Type</b></p> <p>reference</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b></p> <p>ID of the OCR sample document page on which the OCR sample document field is available.</p>

Field	Details
	<p>This field is a relationship field.</p> <p><b>Relationship Name</b> OcrSampleDocumentPage</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> OcrSampleDocumentPage</p>
OcrSampleDocumentPageItemId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> 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.</p> <p><b>Relationship Name</b> OcrSampleDocumentPageItem</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> OcrSampleDocumentPageItem</p>

## 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()`, `describeObjects()`, `query()`, `retrieve()`, `update()`, `upsert()`

### Fields

Field	Details
OcrSampleDocumentId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> The ID of the OCR sample document associated with the page.</p>

Field	Details
	<p>This is a relationship field.</p> <p><b>Relationship Name</b> OcrSampleDocument</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> OcrSampleDocument</p>
PageHeight	<p><b>Type</b> double</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The normalized height of the OCR sample document page.</p>
PageNumber	<p><b>Type</b> int</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The page number of the page in the associated sample document.</p>
PageSignature	<p><b>Type</b> textarea</p> <p><b>Properties</b> Create, Nillable, Update</p> <p><b>Description</b> The signature created from a collection of fields to identify the page in an OCR sample document.</p>

## 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()`, `describeObjects()`, `query()`, `retrieve()`, `update()`, `upsert()`

## Fields

Field	Details
HasHeader	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> Indicates whether the OCR sample document page item has a header. The default value is <code>false</code>.</p>
OcrSampleDocumentPageId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> ID of the OCR sample document page associated with the page item. This field is a relationship field.</p> <p><b>Relationship Name</b> OcrSampleDocumentPage</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> OcrSampleDocumentPage</p>
SequenceNumber	<p><b>Type</b> int</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The sequence number of the item on an OCR sample document page with multiple items.</p>
Title	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Title of the OCR sample document page item.</p>
Type	<p><b>Type</b> picklist</p>

Field	Details
	<b>Properties</b> Create, Filter, Group, Restricted picklist, Sort, Update
	<b>Description</b> 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()`, `describeObjects()`, `query()`, `retrieve()`, `update()`, `upsert()`

### Fields

Field	Details
OcrTemplateId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Sort
	<b>Description</b> ID of the OCR template with the target object's fields mapped. This field is a relationship field.
	<b>Relationship Name</b> OcrTemplate
	<b>Relationship Type</b> Lookup
	<b>Refers To</b> OcrTemplate
TargetObject	<b>Type</b> picklist
	<b>Properties</b> Create, Filter, Group, Restricted picklist, Sort, Update
	<b>Description</b> The object to which information from a document is mapped.

Field	Details
TargetObjectRecordType	<b>Type</b> picklist <b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update <b>Description</b> 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()`, `describeObjects()`, `query()`, `retrieve()`, `update()`, `upsert()`

### Fields

Field	Details
IsActive	<b>Type</b> boolean <b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update <b>Description</b> Indicates if the OCR target object field mapping is available for use. The default value is <code>false</code> .
OcrSampleDocFieldId	<b>Type</b> reference <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> ID of the OCR sample document field associated with the field mapping. This field is a relationship field. <b>Relationship Name</b> OcrSampleDocField <b>Relationship Type</b> Lookup <b>Refers To</b> OcrSampleDocumentField

Field	Details
OcrTargetObjectId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> ID of the OCR target object associated with the field mapping. This field is a relationship field.</p> <p><b>Relationship Name</b> OcrTargetObject</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> OcrTargetObject</p>
TargetField	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> The field of a target object's record, which is mapped to a document field to store the information extracted from that document field.</p>
Type	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> Specifies the type of field mapping. Available in API version 56.0 and later. Possible values are:</p> <ul style="list-style-type: none"> <li>• FormField</li> <li>• TableColumn</li> </ul> <p>The default value is FormField.</p>


## 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()`, `describeObjects()`, `query()`, `retrieve()`, `update()`, `upsert()`

## Fields

Field	Details
Description	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The description of the OCR template. Available in API version 56.0 and later.</p>
DeveloperName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> 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.</p> <p> <b>Note:</b> When creating large sets of data, always specify a unique <code>DeveloperName</code> for each record. If no <code>DeveloperName</code> is specified, performance slows down while Salesforce generates one for each record.</p>
DocumentTypeId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> ID of the document type associated with the OCR template.  This field is a relationship field.</p> <p><b>Relationship Name</b> DocumentType</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> DocumentType</p>
IsActive	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p>

Field	Details
	<b>Description</b> Indicates whether the OCR template is active.
Language	<b>Type</b> picklist <b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update <b>Description</b> The combined language and locale ISO code, which controls the language of the OCR template.
MasterLabel	<b>Type</b> string <b>Properties</b> Create, Filter, Group, Sort, Update <b>Description</b> Label for the OCR target object. This display value is the internal label that doesn't get translated.
NamespacePrefix	<b>Type</b> string <b>Properties</b> Filter, Group, Nillable, Sort <b>Description</b> For managed packages, this field is the namespace prefix assigned to the package. For unmanaged packages, this field is blank.
PageCount	<b>Type</b> int <b>Properties</b> Filter, Group, Nillable, Sort <b>Description</b> 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	<b>Type</b> string <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> 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()`, `describeObjects()`, `query()`, `retrieve()`, `update()`, `upsert()`

### Fields

Field	Details
OcrSampleDocumentId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> ID of the OCR sample document associated with the OCR template sample document. This field is a relationship field.</p> <p><b>Relationship Name</b> OcrSampleDocument</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> OcrSampleDocument</p>
OcrTemplateId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> ID of the OCR template associated with the OCR template sample document. This field is a relationship field.</p> <p><b>Relationship Name</b> OcrTemplate</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> OcrTemplate</p>

## 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	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> 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.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>IDENTITY_DOCUMENT</code>—Identity Document</li> <li>• <code>USER_DEFINED_TYPE</code>—Other Forms</li> </ul>

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
<a href="#">connect/form-reader/mapping</a>	Retrieve the mappings between the values of the keys extracted from the document to the Salesforce object fields with respect to a given template.
<a href="#">/connect/form-reader/contentDocuments/{contentDocumentId}/ocrTemplates/{ocrTemplateId}/targetObjectFieldMappings</a>	Retrieve mapping between the values of the keys extracted from the document with respect to an OCR template.
<a href="#">/connect/form-reader/ocrTemplates</a>	Retrieve a list of active OCR templates.
<a href="#">/connect/form-reader/ocrTemplates/{ocrTemplateId}</a>	Retrieve the details of an active OCR template by the template ID.
<a href="#">/connect/form-reader/contentDocuments/{contentDocumentId}/ocrDocumentScanResults</a>	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.
<a href="#">/connect/form-reader/contentDocuments/{contentDocumentId}/record</a>	Create records in Salesforce objects using a document based on a content document record.
<a href="#">/connect/form-reader/contentDocuments/{contentDocumentId}/record/{targetRecordId}</a>	Update an existing record in a Salesforce object using a document based on a content document record.
<a href="#">/connect/form-reader/receivedDocuments/{receivedDocumentId}/record</a>	Create records in Salesforce objects using a document based on a received document record.
<a href="#">/connect/form-reader/receivedDocuments/{receivedDocumentId}/record/{targetRecordId}</a>	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.

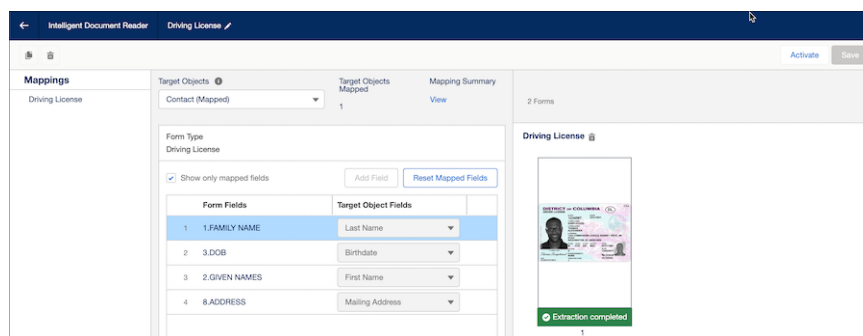
### Permission

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" : "48tS700000004C9DIAU"
}
```

**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 ( <code>true</code> ) or not ( <code>false</code> ).  Default value is <code>true</code> .	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 ( <code>true</code> ) or not ( <code>false</code> ).  The default value is <code>false</code> .   <b>Note:</b> 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

<pre>{   "startPageIndex" : 4,   "endPageIndex" : 4 }</pre>
<pre>{   "startPageIndex" : 4 }</pre>
<pre>{   "endPageIndex" : 4 }</pre>
<pre>{   "ocrService" : "AMAZON_TEXTTRACT_ANALYZED_ID" }</pre>
<pre>{   "startPageIndex" : 4,   "endPageIndex" : 4,   "ocrService" : "AMAZON_TEXTTRACT_ANALYZED_ID" }</pre>

Parameter Name	Type	Description	Required or Optional	Available Version
endPageIndex	Integer	Page number in the document to end extraction.	Optional	55.0
ocrService	String	<p>Name of the service that gets the extraction results.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> <li>• <code>AMAZON_TEXTTRACT</code>—Indicates AWS Document service.</li> <li>• <code>AMAZON_TEXTTRACT_ANALYZED_ID</code>—Indicates AWS Analyze ID service.</li> </ul> <p>The default value is <code>AMAZON_TEXTTRACT</code>.</p>	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": "0dextx0000000001",
  "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 ( <code>true</code> ) or not ( <code>false</code> ).  Default value is <code>false</code> .	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	<a href="#">Fields Without Conflict Input</a> []	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 ( <code>true</code> ) or not ( <code>false</code> ). Default value is <code>false</code> .	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
<del>overrideConfidence</del> ScoreThreshold	Integer	Conflict confidence score threshold value for the extracted value.   <b>Note:</b> 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/0iox0000000001AAA/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 ( <code>true</code> ) or not ( <code>false</code> ). Default value is <code>false</code> .	Optional	55.0
documentTypeId	String	ID of the document type for the document checklist item.	Optional	55.0
fieldsWithoutConflictList	<a href="#">Fields Without Conflict Input</a> []	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
ignoreFieldValue Conflict	Boolean	Indicates whether to ignore conflicts in OCR ( <code>true</code> ) or not ( <code>false</code> ).  Default value is <code>false</code> .	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
overrideConfidence ScoreThreshold	Integer	Conflict confidence score threshold value for the extracted value.   <b>Note:</b> 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**


&lt;DocumentProcessInput&gt;

**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 ( <code>true</code> ) or not ( <code>false</code> ).  Default value is <code>false</code> .	Optional	55.0
documentTypeId	String	ID of the document type for the document checklist item.	Optional	55.0
fieldsWithoutConflictList	<a href="#">Fields Without Conflict Input[]</a>	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 ( <code>true</code> ) or not ( <code>false</code> ).  Default value is <code>false</code> .	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
<code>overrideConfidenceScoreThreshold</code>	Integer	Conflict confidence score threshold value for the extracted value.   <b>Note:</b> The value of this field overrides the confidence score threshold value set on the user interface.	Optional	55.0
<code>recordTypeId</code>	String	ID of the record type of the target object.	Optional	55.0
<code>templateApiName</code>	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 ( <code>true</code> ) or not ( <code>false</code> ).  Default value is <code>false</code> .	Optional	55.0
documentTypeId	String	ID of the document type for the document checklist item.	Optional	55.0
fieldsWithoutConflictList	<a href="#">Fields Without Conflict Input[]</a>	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 ( <code>true</code> ) or not ( <code>false</code> ).  Default value is <code>false</code> .	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
<del>overrideConfidence</del> ScoreThreshold	Integer	Conflict confidence score threshold value for the extracted value.   <b>Note:</b> 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
<code>templateApiName</code>	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
<code>additionalFields</code>	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
<code>attachDocument</code>	Boolean	Indicates whether to automatically create the DocumentCheckListItem (DCI) and ContentDocumentLink records to link the document to the target object ( <code>true</code> ) or not ( <code>false</code> ).  Default value is <code>false</code> .	Optional	55.0
<code>documentTypeId</code>	String	ID of the document type for the document checklist item.	Optional	55.0
<code>fieldsWithoutConflictList</code>	<a href="#">Fields Without Conflict Input</a> []	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
ignoreFieldValue Conflict	Boolean	Indicates whether to ignore conflicts in OCR ( <code>true</code> ) or not ( <code>false</code> ).  Default value is <code>false</code> .	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
overrideConfidence ScoreThreshold	Integer	Conflict confidence score threshold value for the extracted value.   <b>Note:</b> 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 ( <code>true</code> ) or not ( <code>false</code> ). Default value is <code>true</code> .	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": "0ixRM0000004DP1",
  "ocrService": "AMAZON_TEXTTRACT",
  "pageNumber": 1,
  "status": "SUCCESS"
}

```

```

    ],
    "status": {
      "code": "SUCCESS",
      "message": "API call has been executed successfully."
    }
  }
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
ocrDocument ScanResults	<a href="#">ODSR Detailed Output[]</a>	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	<a href="#">Document Conflict Field[]</a>	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	<a href="#">Document Conflict Field List</a>	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 ( <code>true</code> ) or not ( <code>false</code> ).	Small, 55.0	55.0
message	String	The message of the create or update API request.	Small, 55.0	55.0
objectFieldList	<a href="#">Object Field List</a>	The list of fields that are created or updated in the target object record.	Small, 55.0	55.0
ocrDocumentScanResultIdList	<a href="#">OCR Document Scan Result List</a>	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	<a href="#">Form Reader Target Object Mappings[]</a>	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	<a href="#">Form Reader Object Field Mapping[]</a>	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	<a href="#">Object Field[]</a>	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	<a href="#">OCR Document Scan Result[]</a>	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.	Small, 56.0	56.0

 **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.

## 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.  <b>Note:</b> 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	<a href="#">Document Field</a>	Details of the field in a form whose value is extracted and mapped to a Salesforce object field.	Small, 55.0	55.0
ocrTargetObjectFields	<a href="#">OCR Target Object Field</a> on page 1147[]	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.  <b>Note:</b> 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	<p>Name of the service that gets the extraction results.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> <li>AMAZON_TEXTTRACT—Indicates AWS Document service.</li> <li>AMAZON_TEXTTRACT_ANALYZED_ID—Indicates AWS Analyze ID service.</li> </ul> <p>The default value is AMAZON_TEXTTRACT.</p>	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": "97hRM00000004Cii",
          "targetObject": "Employee__c",
          "targetObjectRecordType" : null
        },
        {
          "ocrTargetObjectId": "97hRM000000000i1",
          "targetObject": "Account",
          "targetObjectRecordType" : "AccountRecordType1"
        }
      ],
      "ocrTemplateId": "48tRM00000000Yr"
    },
    {
      "apiName": "testemp",
      "documentTypeId": "0deRM00000000Dj",
      "name": "testemp",
      "ocrTargetObjects": [
        {
          "ocrTargetObjectId": "97hRM00000004ChL",
          "targetObject": "Account",
          "targetObjectRecordType" : "AccountRecordType1"
        },
        {
          "ocrTargetObjectId": "97hRM00000004Ckj",
          "targetObject": "Employee__c",
          "targetObjectRecordType" : null
        },
        {
          "ocrTargetObjectId": "97hRM000000000hD",
          "targetObject": "Contact",
          "targetObjectRecordType" : "ContactRecordType1"
        },
        {
          "ocrTargetObjectId": "97hRM000000000hE",
          "targetObject": "Lead",
          "targetObjectRecordType" : "LeadRecordType1"
        },
        {
          "ocrTargetObjectId": "97hRM000000000hF",
          "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	<a href="#">OCR Template Output[]</a>	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	<a href="#">OCR Sample Document[]</a>	List of OCR sample documents associated with the OCR template.   <b>Note:</b> 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	<a href="#">OCR Target Object Field Mapping[]</a>	List of OCR target object field mappings in the OCR template.   <b>Note:</b> Specifies how information from a form field is mapped to fields in an object.	Small, 55.0	55.0
ocrTargetObjects	<a href="#">OCR Target Object[]</a>	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": "97hRM00000004Cii",
        "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	<a href="#">Template Detail</a>	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
<del>ocrDocumentScanResultInfo</del>	<a href="#">OCR Document Scan Result Info[]</a>	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
<code>actionType</code>	InvokableActionType (enumeration of type string)	Required. The action type. Additional valid values only for Intelligent Document Reader include: <ul style="list-style-type: none"> <li><code>fetchActiveOcrTemplates</code>—Fetch all the active OCR templates present in an org. Available in API version 58.0 and later.</li> <li><code>fetchExtractedText</code>—Fetch the text extracted from an uploaded document. Available in API version 58.0 and later.</li> <li><code>initiateTextExtraction</code>—Extract text from the pages of an uploaded document. Available in API version 58.0 and later.</li> </ul>

## 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
<code>contentAsset</code>	string	The ID of the OCR sample document asset. <div>  <b>Note:</b> This field is null if the OcrSampleDocument is an abstract document representing the DocumentType.         </div>


Field Name	Field Type	Description
documentHeight	double	The normalized height of the OCR sample document page.   <b>Note:</b> This field is null if the <code>OcrSampleDocument</code> is an abstract document representing the <code>DocumentType</code> .
documentType	string	Required. The type of the OCR sample document.
masterLabel	string	Required. The label for the OCR sample document.
ocrSampleDocumentFields	<a href="#">OcrSampleDocumentField</a>	The details of the field in a form whose value is extracted and mapped to a Salesforce object field.
ocrSampleDocumentPages	<a href="#">OcrSampleDocumentPage</a>	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 3: 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 ( <code>true</code> ) or not ( <code>false</code> ). Available in API version 57.0 and later.   <b>Note:</b> 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.  <b>Note:</b> This field is null if the OcrSampleDocument is an abstract document representing the DocumentType.
ocrSampleDocumentPageItem	<a href="#">OcrSampleDocumentPageItem</a>	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 4: 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	<a href="#">OcrSampleDocumentPageItem</a>	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 5: Fields**

Field Name	Field Type	Description
hasHeader	boolean	Indicates whether the OCR sample document page item has a header ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> . 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	<a href="#">OcrTargetObject[]</a>	Represents the details of the object to which information from a form is extracted and mapped.
ocrTemplateSampleDocuments	<a href="#">OcrTemplateSampleDocument[]</a>	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 6: Fields**

Field Name	Field Type	Description
ocrTargetObjectFieldMappings	<a href="#">OcrTargetObjFieldMapping[]</a>	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 7: Fields**

Field Name	Field Type	Description
ocrSampleDocField	<a href="#">OcrSampleDocumentField[]</a>	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: <ul style="list-style-type: none"> <li>• <code>FormField</code></li> <li>• <code>TableColumn</code></li> </ul> The default value is <code>FormField</code> .

## OcrSampleDocumentField

Represents the details of the field in a form whose value is extracted and mapped to a Salesforce object field.

Table 8: 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	<a href="#">OcrSampleDocumentPageItem</a>	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 9: Fields

Field Name	Field Type	Description
hasHeader	boolean	Indicates whether the OCR sample document page item has a header ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> . 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 10: 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>
    </ocrTargetObjFieldMappings>
  </ocrTargetObjects>
</OcrTemplate>
```

```

    <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	<p><b>Field Type</b></p> <p>double</p> <p><b>Description</b></p> <p>Required.</p> <p>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.</p>

## 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()`, `describeObjects()`, `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	<p><b>Type</b> picklist</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> The application associated with the OCR sample document.  Possible values are:</p> <ul style="list-style-type: none"> <li>• EinsteinDocumentReader</li> <li>• Industries</li> </ul>
DeveloperName	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> 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.</p> <p> <b>Note:</b> 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.</p>
DocumentHeight	<p><b>Type</b> double</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> Normalized height of the OCR sample document page.</p>
FullName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Group, Nillable</p>

Field	Details
	<p><b>Description</b></p> <p>Full name of the associated metadata type in Metadata API.</p> <p>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.</p>
Language	<p><b>Type</b></p> <p>picklist</p> <p><b>Properties</b></p> <p>Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b></p> <p>Language of the OCR sample document.</p>
ManageableState	<p><b>Type</b></p> <p>picklist</p> <p><b>Properties</b></p> <p>Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b></p> <p>Indicates the manageable state of the specified component that is contained in a package.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• beta—Managed-Beta</li> <li>• deleted—Managed-Proposed-Deleted</li> <li>• deprecated—Managed-Proposed-Deprecated</li> <li>• deprecatedEditable—SecondGen-Installed-Deprecated</li> <li>• installed—Managed-Installed</li> <li>• installedEditable—SecondGen-Installed-Editable</li> <li>• released—Managed-Released</li> <li>• unmanaged—Unmanaged</li> </ul>
MasterLabel	<p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Filter, Group, Sort</p> <p><b>Description</b></p> <p>Label of the OCR sample document.</p>
Metadata	<p><b>Type</b></p> <p>complexvalue</p> <p><b>Properties</b></p> <p>Create, Nillable, Update</p>

Field	Details
	<b>Description</b> OCR sample document metadata.
NamespacePrefix	<b>Type</b> string  <b>Properties</b> Filter, Group, Nillable, Sort  <b>Description</b> 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()`, `describeObjects()`, `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	<b>Type</b> int  <b>Properties</b> Create, Filter, Group, in Nillable, Sort, Update  <b>Description</b> 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	<b>Type</b> int

Field	Details
	<p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> 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.</p>
CellRowNumber	<p><b>Type</b> int</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> 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.</p>
CellRowSpanValue	<p><b>Type</b> int</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> 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.</p>
FieldLabelMaxX	<p><b>Type</b> double</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> A normalized coordinate representing the right edge of the bounding box of the key.</p>
FieldLabelMaxY	<p><b>Type</b> double</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> A normalized coordinate representing the bottom edge of the bounding box of the key.</p>
FieldLabelMinX	<p><b>Type</b> double</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> A normalized coordinate representing the left edge of the bounding box of the key.</p>

Field	Details
FieldLabelMinY	<p><b>Type</b> double</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> A normalized coordinate representing the top edge of the bounding box of the key.</p>
IsAutoExtracted	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> Indicates whether the OCR sample document field is auto-extracted by the OCR service (<code>true</code>) or not (<code>false</code>). Available in API version 57.0 and later.  The default value is <code>false</code>.</p>
ItemType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> The type of item associated with the OCR sample document field. Available in API version 56.0 and later.  Possible value is <code>TABLE</code>.</p>
KeyContent	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Content in a particular area of the document.</p>
ManageableState	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Indicates the manageable state of the specified component that is contained in a package.  Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>beta</code>—Managed-Beta</li> <li>• <code>deleted</code>—Managed-Proposed-Deleted</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>• deprecated—Managed-Proposed-Deprecated</li> <li>• deprecatedEditable—SecondGen-Installed-Deprecated</li> <li>• installed—Managed-Installed</li> <li>• installedEditable—SecondGen-Installed-Editable</li> <li>• released—Managed-Released</li> <li>• unmanaged—Unmanaged</li> </ul>
OcrSampleDocumentId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> ID of the associated OCR sample document. This is a relationship field.</p> <p><b>Relationship Name</b> OcrSampleDocument</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> OcrSampleDocument</p>
OcrSampleDocumentPageId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> ID of the associated OCR sample document page. This is a relationship field.</p> <p><b>Relationship Name</b> OcrSampleDocumentPage</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> OcrSampleDocumentPage</p>
OcrSampleDocumentPageItemId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p><b>Description</b></p> <p>The ID of the OCR sample document page item with the field. Available in API version 56.0 and later.</p> <p>This is a relationship field.</p> <p><b>Relationship Name</b></p> <p>OcrSampleDocumentPageItem</p> <p><b>Relationship Type</b></p> <p>Lookup</p> <p><b>Refers To</b></p> <p>OcrSampleDocumentPageItem</p>

## 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()`, `describeObjects()`, `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	<p><b>Type</b></p> <p>picklist</p> <p><b>Properties</b></p> <p>Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b></p> <p>Indicates the manageable state of the specified component that is contained in a package.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>beta</code>—Managed-Beta</li> <li>• <code>deleted</code>—Managed-Proposed-Deleted</li> <li>• <code>deprecated</code>—Managed-Proposed-Deprecated</li> <li>• <code>deprecatedEditable</code>—SecondGen-Installed-Deprecated</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>• <code>installed</code>—Managed-Installed</li> <li>• <code>installedEditable</code>—SecondGen-Installed-Editable</li> <li>• <code>released</code>—Managed-Released</li> <li>• <code>unmanaged</code>—Unmanaged</li> </ul>
<code>OcrSampleDocumentId</code>	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> ID of the OCR sample document. This is a relationship field.</p> <p><b>Relationship Name</b> OcrSampleDocument</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> OcrSampleDocument</p>
<code>PageHeight</code>	<p><b>Type</b> double</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> Normalized height of the OCR sample document page.</p>
<code>PageNumber</code>	<p><b>Type</b> int</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Page number of the page in the associated OCR sample document.</p>

## 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()`, `describeObjects()`, `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	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> Indicates whether the OCR sample document page item has a header. The default value is <code>false</code>.</p>
ManageableState	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Indicates the manageable state of the specified component that is contained in a package. Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>beta</code>—Managed-Beta</li> <li>• <code>deleted</code>—Managed-Proposed-Deleted</li> <li>• <code>deprecated</code>—Managed-Proposed-Deprecated</li> <li>• <code>deprecatedEditable</code>—SecondGen-Installed-Deprecated</li> <li>• <code>installed</code>—Managed-Installed</li> <li>• <code>installedEditable</code>—SecondGen-Installed-Editable</li> <li>• <code>released</code>—Managed-Released</li> <li>• <code>unmanaged</code>—Unmanaged</li> </ul>
OcrSampleDocumentPageId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> ID of the OCR sample document page associated with the page item. This field is a relationship field.</p>

Field	Details
	<b>Relationship Name</b> OcrSampleDocumentPage <b>Relationship Type</b> Lookup <b>Refers To</b> OcrSampleDocumentPage
SequenceNumber	<b>Type</b> int <b>Properties</b> Create, Filter, Group, Sort, Update <b>Description</b> The sequence number of the item on an OCR sample document page with multiple items.
Title	<b>Type</b> string <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> Title of the OCR sample document page item.
Type	<b>Type</b> picklist <b>Properties</b> Create, Filter, Group, Restricted picklist, Sort, Update <b>Description</b> 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()`, `describeObjects()`, `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	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Indicates the manageable state of the specified component that is contained in a package. Possible values are:</p> <ul style="list-style-type: none"> <li>• beta—Managed-Beta</li> <li>• deleted—Managed-Proposed-Deleted</li> <li>• deprecated—Managed-Proposed-Deprecated</li> <li>• deprecatedEditable—SecondGen-Installed-Deprecated</li> <li>• installed—Managed-Installed</li> <li>• installedEditable—SecondGen-Installed-Editable</li> <li>• released—Managed-Released</li> <li>• unmanaged—Unmanaged</li> </ul>
OcrTemplateId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> The ID of the associated OCR template. This is a relationship field.</p> <p><b>Relationship Name</b> OcrTemplate</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> OcrTemplate</p>
TargetObject	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Restricted picklist, Sort, Update</p>

Field	Details
	<b>Description</b> 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	<b>Type</b> picklist  <b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update  <b>Description</b> 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	<b>Type</b> boolean  <b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update  <b>Description</b> Indicates if the OCR target object field mapping is available for use.  The default value is <code>false</code> .

Field	Details
ManageableState	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Indicates the manageable state of the specified component that is contained in a package. Possible values are:</p> <ul style="list-style-type: none"> <li>• beta—Managed-Beta</li> <li>• deleted—Managed-Proposed-Deleted</li> <li>• deprecated—Managed-Proposed-Deprecated</li> <li>• deprecatedEditable—SecondGen-Installed-Deprecated</li> <li>• installed—Managed-Installed</li> <li>• installedEditable—SecondGen-Installed-Editable</li> <li>• released—Managed-Released</li> <li>• unmanaged—Unmanaged</li> </ul>
OcrSampleDocFieldId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> ID of the associated OCR sample document field. This is a relationship field.</p> <p><b>Relationship Name</b> OcrSampleDocField</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> OcrSampleDocumentField</p>
OcrTargetObjectId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> ID of the target object. This is a relationship field.</p> <p><b>Relationship Name</b> OcrTargetObject</p>

Field	Details
	<b>Relationship Type</b> Lookup <b>Refers To</b> OcrTargetObject
TargetField	<b>Type</b> picklist <b>Properties</b> Create, Filter, Group, Restricted picklist, Sort, Update <b>Description</b> 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 <code>TargetObject</code> field of <code>OcrTargetObject</code> . Not all fields of these supported objects are available for mapping.
Type	<b>Type</b> picklist <b>Properties</b> Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update <b>Description</b> Specifies the type of field mapping.. Available in API version 56.0 and later. Possible values are: <ul style="list-style-type: none"> <li>• <code>FormField</code></li> <li>• <code>TableColumn</code></li> </ul> The default value is <code>FormField</code> .

## 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()`, `describeObjects()`, `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	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> Description of the OCR template.</p>
DeveloperName	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> 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.</p> <p> <b>Note:</b> When creating large sets of data, always specify a unique <code>DeveloperName</code> for each record. If no <code>DeveloperName</code> is specified, performance slows down while Salesforce generates one for each record.</p>
FullName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Group, Nillable</p> <p><b>Description</b> 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.</p>
IsActive	<p><b>Type</b> boolean</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Sort</p>

Field	Details
	<b>Description</b> Indicates whether this OCR template is active ( <code>true</code> ) or not ( <code>false</code> ).
Language	<b>Type</b> picklist <b>Properties</b> Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort <b>Description</b> Language of the OCR template.
ManageableState	<b>Type</b> picklist <b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort <b>Description</b> Indicates the manageable state of the specified component that is contained in a package. Possible values are: <ul style="list-style-type: none"> <li>• <code>beta</code>—Managed-Beta</li> <li>• <code>deleted</code>—Managed-Proposed-Deleted</li> <li>• <code>deprecated</code>—Managed-Proposed-Deprecated</li> <li>• <code>deprecatedEditable</code>—SecondGen-Installed-Deprecated</li> <li>• <code>installed</code>—Managed-Installed</li> <li>• <code>installedEditable</code>—SecondGen-Installed-Editable</li> <li>• <code>released</code>—Managed-Released</li> <li>• <code>unmanaged</code>—Unmanaged</li> </ul>
MasterLabel	<b>Type</b> string <b>Properties</b> Filter, Group, Sort <b>Description</b> Label of the optical character reader (OCR) template.
Metadata	<b>Type</b> complexvalue <b>Properties</b> Create, Nillable, Update <b>Description</b> OCR template metadata.

Field	Details
NamespacePrefix	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> Namespace prefix associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix.</p>
PageCount	<p><b>Type</b> int</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> Number of pages in the document from which information is extracted.</p>
TemplateName	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> Name of the OCR template.</p>

## 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	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Indicates the manageable state of the specified component that is contained in a package. Possible values are:</p> <ul style="list-style-type: none"> <li>• beta—Managed-Beta</li> <li>• deleted—Managed-Proposed-Deleted</li> <li>• deprecated—Managed-Proposed-Deprecated</li> <li>• deprecatedEditable—SecondGen-Installed-Deprecated</li> <li>• installed—Managed-Installed</li> <li>• installedEditable—SecondGen-Installed-Editable</li> <li>• released—Managed-Released</li> <li>• unmanaged—Unmanaged</li> </ul>
OcrSampleDocumentId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> ID of the associated OCR sample document. This is a relationship field.</p> <p><b>Relationship Name</b> OcrSampleDocument</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> OcrSampleDocument</p>
OcrTemplateId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> ID of the associated OCR template. This is a relationship field.</p>

Field	Details
	<b>Relationship Name</b> OcrTemplate
	<b>Relationship Type</b> Lookup
	<b>Refers To</b> 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	<p><b>Type</b></p> <p>string</p> <p><b>Description</b></p> <p>Optional. The ID of the document type associated with the OCR template.</p> <p> <b>Note:</b> You can specify up to 20 document type IDs.</p>
targetObjects	<p><b>Type</b></p> <p>string</p> <p><b>Description</b></p> <p>Optional. The comma-separated list of target object API names associated with the OCR template.</p>

Outputs

Output	Details
ocrTemplates	<p><b>Type</b></p> <p>string</p> <p><b>Description</b></p> <p>The comma-separated list of OCR template records that match the specified document type ID and target objects.</p>

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/vxx.x/actions/standard/fetchExtractedText`

#### Formats

JSON, XML


#### HTTP Methods


POST

#### Authentication

Authorization: Bearer *token*

### Inputs

Input	Details
<code>contentDocumentId</code>	<p><b>Type</b> string</p> <p><b>Description</b> Required. The unique content document ID of the uploaded document to get the extracted text.</p> <p> <b>Note:</b> You can specify up to 20 content Document IDs.</p>
<code>endPageIndex</code>	<p><b>Type</b> Integer</p> <p><b>Description</b> 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.</p>
<code>startPageIndex</code>	<p><b>Type</b> Integer</p> <p><b>Description</b> Optional. The page number to start fetching the extracted text. The default value is 1.</p>

Input	Details
	<div> <b>Note:</b> You can fetch the extracted text from up to 20 pages in a specified document.</div>

Outputs

Output	Details
ocrDocumentScanResultDetails	<div><b>Type</b> string</div> <div><b>Description</b> 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 <a href="#">OcrDocumentScanResultDetailsList</a> Apex class. Each element in this array corresponds to an input contentDocumentId in the same order as they were provided in the request.</div>

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_TEXTTRACT",
            "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_TEXTTRACT_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
<code>configurationAPIName</code>	<p><b>Type</b> string</p> <p><b>Description</b> For internal use only.</p>
<code>contentDocumentId</code>	<p><b>Type</b> string</p> <p><b>Description</b> Required. The unique content document ID of the uploaded document to initiate text extraction.  You can specify up to 20 content Document IDs.</p>
<code>documentTypeId</code>	<p><b>Type</b> string</p> <p><b>Description</b> 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.</p>
<code>endPageIndex</code>	<p><b>Type</b> integer</p> <p><b>Description</b> Optional. The page number up to which the text must be extracted. The default value is the last page number in the specified document.</p>
<code>ocrService</code>	<p><b>Type</b> picklist</p> <p><b>Description</b> Optional. The name of the OCR service that extracts text from the document. Valid values are:</p> <ul style="list-style-type: none"> <li>• <code>AMAZON_TEXTTRACT</code>—Indicates the AWS Document service.</li> <li>• <code>AMAZON_TEXTTRACT_ANALYZE_ID</code>—Indicates the AWS Analyze ID service.</li> <li>• <code>AMAZON_TEXTTRACT_DETECT_TEXT</code>—Indicates the AWS Detect service that displays the text detected in a document.</li> <li>• <code>PDF_DOCX_EXTRACT_TEXT</code>—Indicates the AWS Extract service that automatically extracts content from PDF files.</li> </ul> <p>Required if the <code>documentTypeId</code> property isn't specified. The <code>ocrService</code> is retrieved based on the <code>documentTypeId</code> property.</p>
<code>startPageIndex</code>	<p><b>Type</b> integer</p>

Input	Details
	<p><b>Description</b></p> <p>Optional. The page number to start text extraction. By default, the starting page number is 1.</p> <p>You can extract text from up to 20 pages in a specified document.</p>

Outputs

Output	Details
ocrDocumentScanResultDetails	<p><b>Type</b></p> <p>string</p> <p><b>Description</b></p> <p>A comma-separated list containing an OcrDocumentScanResult ID and a page number for each extracted page of the specified document.</p>

Example

Sample Request

```
{
  "inputs": [
    {
      "contentDocumentId": "069T10000004FnoIAE",
      "startPageIndex": 1,
      "endPageIndex": 20,
      "ocrService": "AMAZON_TEXTTRACT",
      "documentTypeId": "0deT10000004CCbIAM"
    }
  ]
}
```

Sample Response

```
[
  {
    "actionName": "initiateTextExtraction",
    "errors": null,
    "isSuccess": true,
    "outputValues": {
      "ocrDocumentScanResultDetails": {
        "ocrDocumentScanResults": [
          {
            "pageNumber": 1,
            "ocrDocumentScanResultId": "0ixT100000000bv"
          }
        ]
      }
    }
  },
]
```

```
    "version":1
  }
]
```

## Intelligent Form Reader

---

Intelligent Form 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.

### [Intelligent Form Reader Standard Objects](#)

Use standard objects to create, update, and activate intelligent form reader.

### [Intelligent Form Reader Business APIs](#)

Use the Intelligent Form Reader Business APIs to read the mapping details of the extracted text that is stored in a Salesforce object. Intelligent Form reader uses optical character recognition to automatically extract data from documents. You specify the kind of form you are getting data from, then map fields in the form to the appropriate fields in the Salesforce objects.

### [Intelligent Form Reader 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](#).

### [Intelligent Form Reader 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](#).

### [Intelligent Form Reader Standard Invocable Actions](#)

Intelligent Form 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

## Intelligent Form Reader Standard Objects

Use standard objects to create, update, and activate intelligent form reader.

### [OcrDocumentScanResult](#)

Represents the details of the information extracted from the document. This object is available in API version 50.0 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 50.0 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 50.0 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 52.0 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 50.0 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 50.0 and later.

[OcrTemplate](#)

Represents the details of the mapping between the document and the Salesforce object using Einstein Form Reader. This object is available in API version 50.0 and later.

[OcrTemplateSampleDocument](#)

Represents a relationship between an OCR template and an OCR sample document. This object is available in API version 50.0 and later.

[Intelligent Form Reader Field on DocumentType](#)

Standard and custom fields extend the standard DocumentType object for use in Intelligent Form Reader to represent information about document types for identity documents or other documents with information that you want to extract. This field is available in API version 57.0 and later.

## OcrDocumentScanResult

Represents the details of the information extracted from the document. 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()`

### 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	<b>Type</b> reference  <b>Properties</b> Filter, Group, Sort

Field	Details
	<p><b>Description</b> ID of the content document associated with the OCR document scan result. This field is a relationship field.</p> <p><b>Relationship Name</b> ContentDocument</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> ContentDocument</p>
ContentVersionId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> ID of the content version associated with the OCR document scan result.</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> ContentVersion</p>
ErrorMessage	<p><b>Type</b> textarea</p> <p><b>Properties</b> Create, Nillable, Update</p> <p><b>Description</b> The message with information about the failure of OCR API calls during extraction. Available in API version 54.0 and later.</p>
ExtractedItemData	<p><b>Type</b> textarea</p> <p><b>Properties</b> Nillable</p> <p><b>Description</b> 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.</p>
ExtractedValues	<p><b>Type</b> textarea</p> <p><b>Properties</b> Nillable</p>

Field	Details
	<p><b>Description</b></p> <p>The information extracted from the document.</p> <p> <b>Note:</b> This field is encryptable with Salesforce Platform Encryption.</p>
LastReferencedDate	<p><b>Type</b></p> <p>dateTime</p> <p><b>Properties</b></p> <p>Filter, Nillable, Sort</p> <p><b>Description</b></p> <p>The timestamp when the current user last accessed this record, a record related to this record, or a list view.</p>
LastViewedDate	<p><b>Type</b></p> <p>dateTime</p> <p><b>Properties</b></p> <p>Filter, Nillable, Sort</p> <p><b>Description</b></p> <p>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.</p>
Name	<p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Create, Filter, Group, idLookup, Sort, Update</p> <p><b>Description</b></p> <p>Name of the OCR document scan result.</p>
OcrService	<p><b>Type</b></p> <p>picklist</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b></p> <p>The name of the OCR service that extracts information from the form and maps it to the Salesforce object.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• AMAZON_TEXTTRACT</li> <li>• AMAZON_TEXTTRACT_ANALYZED_ID—Available in API version 57.0 and later.</li> </ul>
OcrStatus	<p><b>Type</b></p> <p>picklist</p>

Field	Details
	<p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> Status of the extraction and mapping of information from the form field.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• ERROR</li> <li>• OCR_ENQUEUE</li> <li>• SUCCESS</li> </ul>
PageNumber	<p><b>Type</b> int</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort</p> <p><b>Description</b> The number of the page in the form in which the extracted value is available.</p>
Rotation	<p><b>Type</b> int</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> Angle of the document at which it's scanned.</p>

## Associated Objects

This object has the following associated objects. If the API version isn'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](#) on page 1589**

Feed tracking is available for the object.

**[OcrDocumentScanResultHistory](#) on page 1597**

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 50.0 and later.

## Supported Calls

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

## Fields

Field	Details
ApplicationType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The application associated with the OCR sample document. Available in API version 54.0 and later.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• EinsteinDocumentReader</li> <li>• Industries</li> </ul> <p>The default value is Industries.</p>
ContentAssetId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> ID of the content asset associated with the OCR sample document.</p> <p>This field is a relationship field.</p> <p><b>Relationship Name</b> ContentAsset</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> ContentAsset</p>
DeveloperName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> <b>Description</b> 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.</p>

Field	Details
	 <b>Note:</b> When creating large sets of data, always specify a unique <code>DeveloperName</code> for each record. If no <code>DeveloperName</code> is specified, performance slows down while Salesforce generates one for each record.
DocumentHeight	<p><b>Type</b> double</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The normalized height of the document page assuming 1.0 as the fixed width for all the documents. Available in API version 52.0 and later.</p>
DocumentTypeId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The ID of the document type associated with the OCR sample document. This field is a relationship field.</p> <p><b>Relationship Name</b> DocumentType</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> DocumentType</p>
Language	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The combined language and locale ISO code, which controls the language of the OCR sample document.</p>
MasterLabel	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The label for the OCR sample document. This display value is the internal label that doesn't get translated.</p>

Field	Details
NamespacePrefix	<p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Sort, Update</p> <p><b>Description</b></p> <p>For managed packages, this field is the namespace prefix assigned to the package. For unmanaged packages, this field is blank.</p>

## 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 50.0 and later.

### Supported Calls

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

### Fields

Field	Details
CellColumnNumber	<p><b>Type</b></p> <p>int</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b></p> <p>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.</p>
CellColumnSpanValue	<p><b>Type</b></p> <p>int</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b></p> <p>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.</p>
CellRowNumber	<p><b>Type</b></p> <p>int</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p><b>Description</b></p> <p>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.</p>
CellRowSpanValue	<p><b>Type</b></p> <p>int</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b></p> <p>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.</p>
FieldLabelMaxX	<p><b>Type</b></p> <p>double</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b></p> <p>A normalized coordinate representing the right edge of the bounding box of the key. Available in API version 52.0 and later.</p>
FieldLabelMaxY	<p><b>Type</b></p> <p>double</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b></p> <p>A normalized coordinate representing the bottom edge of the bounding box of the key. Available in API version 52.0 and later.</p>
FieldLabelMinX	<p><b>Type</b></p> <p>double</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b></p> <p>A normalized coordinate representing the left edge of the bounding box of the key. Available in API version 52.0 and later.</p>
FieldLabelMinY	<p><b>Type</b></p> <p>double</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p><b>Description</b></p> <p>A normalized coordinate representing the top edge of the bounding box of the key. Available in API version 52.0 and later.</p>
IsAutoExtracted	<p><b>Type</b></p> <p>boolean</p> <p><b>Properties</b></p> <p>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b></p> <p>Indicates whether the OCR sample document field is auto-extracted by the OCR service (<code>true</code>) or not (<code>false</code>). Available in API version 57.0 and later.</p> <p>The default value is <code>false</code>.</p>
ItemType	<p><b>Type</b></p> <p>picklist</p> <p><b>Properties</b></p> <p>Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b></p> <p>The type of item associated with the OCR sample document field. Available in API version 56.0 and later.</p> <p>Possible value is <code>TABLE</code>.</p>
KeyContent	<p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b></p> <p>Content in a particular area of the document.</p>
OcrSampleDocumentId	<p><b>Type</b></p> <p>reference</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Sort</p> <p><b>Description</b></p> <p>ID of the OCR sample document with the field.</p> <p>This field is a relationship field.</p> <p><b>Relationship Name</b></p> <p>OcrSampleDocument</p> <p><b>Relationship Type</b></p> <p>Lookup</p>

Field	Details
	<b>Refers To</b> OcrSampleDocument
OcrSampleDocumentPageId	<b>Type</b> reference <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> ID of the OCR sample document page on which the OCR sample document field is available. Available in API version 52.0 and later. This field is a relationship field. <b>Relationship Name</b> OcrSampleDocumentPage <b>Relationship Type</b> Lookup <b>Refers To</b> OcrSampleDocumentPage
OcrSampleDocumentPageItemId	<b>Type</b> reference <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> 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. <b>Relationship Name</b> OcrSampleDocumentPageItem <b>Relationship Type</b> Lookup <b>Refers To</b> OcrSampleDocumentPageItem

## OcrSampleDocumentPage

Represents the details of the fields that define a page in the OCR sample document. This object is available in API version 52.0 and later.

### Supported Calls

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

## Fields

Field	Details
OcrSampleDocumentId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> The ID of the OCR sample document associated with the page. This is a relationship field.</p> <p><b>Relationship Name</b> OcrSampleDocument</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> OcrSampleDocument</p>
PageHeight	<p><b>Type</b> double</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The normalized height of the sample document page.</p>
PageNumber	<p><b>Type</b> int</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The page number of the page in the associated sample document.</p>

## 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()`, `describeObjects()`, `query()`, `retrieve()`, `update()`, `upsert()`

## Fields

Field	Details
HasHeader	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> Indicates whether the OCR sample document page item has a header (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
OcrSampleDocumentPageId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> ID of the OCR sample document page associated with the page item. This field is a relationship field.</p> <p><b>Relationship Name</b> OcrSampleDocumentPage</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> OcrSampleDocumentPage</p>
SequenceNumber	<p><b>Type</b> int</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> Sequence number of the item on an OCR sample document page with multiple items.</p>
Title	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Title of the OCR sample document page item.</p>
Type	<p><b>Type</b> picklist</p>

Field	Details
	<b>Properties</b> Create, Filter, Group, Restricted picklist, Sort, Update
	<b>Description</b> Specifies the type of OCR sample document page item. Possible value is <code>TABLE</code> .

## OcrTargetObject

Represents the details of the object to which information from a document is extracted and mapped. This object is available in API version 50.0 and later.

### Supported Calls

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

### Fields

Field	Details
OcrTemplateId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Sort
	<b>Description</b> ID of the OCR template with the target object's fields mapped. This field is a relationship field.
	<b>Relationship Name</b> OcrTemplate
	<b>Relationship Type</b> Lookup
	<b>Refers To</b> OcrTemplate
TargetObject	<b>Type</b> picklist
	<b>Properties</b> Create, Filter, Group, Restricted picklist, Sort, Update
	<b>Description</b> The object to which information from a document is mapped.

Field	Details
TargetObjectRecordType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The record type ID of the OCR target object. Available in API version 56.0 and later.</p>

## 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 50.0 and later.

### Supported Calls

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

### Fields

Field	Details
IsActive	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> Indicates whether the OCR target object field mapping is available for use (<code>true</code>) or not (<code>false</code>).  The default value is <code>false</code>.</p>
OcrSampleDocFieldId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> ID of the OCR sample document field associated with the field mapping.  This field is a relationship field.</p> <p><b>Relationship Name</b> OcrSampleDocField</p> <p><b>Relationship Type</b> Lookup</p>

Field	Details
	<b>Refers To</b> OcrSampleDocumentField
OcrTargetObjectId	<b>Type</b> reference <b>Properties</b> Create, Filter, Group, Sort <b>Description</b> ID of the OCR target object associated with the field mapping. This field is a relationship field. <b>Relationship Name</b> OcrTargetObject <b>Relationship Type</b> Lookup <b>Refers To</b> OcrTargetObject
TargetField	<b>Type</b> picklist <b>Properties</b> Create, Filter, Group, Restricted picklist, Sort, Update <b>Description</b> 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	<b>Type</b> picklist <b>Properties</b> Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update <b>Description</b> Specifies the type of field mapping. Available in API version 56.0 and later. Possible values are: <ul style="list-style-type: none"> <li>FormField</li> <li>TableColumn</li> </ul> The default value is FormField.


## OcrTemplate

Represents the details of the mapping between the document and the Salesforce object using Einstein Form Reader. This object is available in API version 50.0 and later.

## Supported Calls

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

## Fields

Field	Details
Description	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The description of the OCR template. Available in API version 56.0 and later.</p>
DeveloperName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> 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.</p> <p> <b>Note:</b> When creating large sets of data, always specify a unique <code>DeveloperName</code> for each record. If no <code>DeveloperName</code> is specified, performance slows down while Salesforce generates one for each record.</p>
DocumentTypeId	<p><b>Type</b> reference</p> <p><b>Relationship Name</b> DocumentType</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> DocumentType</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> ID of the associated document type. This is a relationship field.</p>
IsActive	<p><b>Type</b> boolean</p>

Field	Details
	<p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> Indicates whether this OCR template is active.</p>
Language	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> Language of the OCR template.</p>
MasterLabel	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The label for the OCR template.</p>
NamespacePrefix	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> For managed packages, this field is the namespace prefix assigned to the package. For unmanaged packages, this field is blank. Available in API version 52.0 and later.</p>
PageCount	<p><b>Type</b> int</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> Number of pages in the document from which information is extracted.</p>
TemplateName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Name of the OCR template.</p>

## OcrTemplateSampleDocument

Represents a relationship between an OCR template and an OCR sample document. This object is available in API version 50.0 and later.

### Supported Calls

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

### Fields

Field	Details
OcrSampleDocumentId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> ID of the OCR sample document associated with the OCR template sample document. This field is a relationship field.</p> <p><b>Relationship Name</b> OcrSampleDocument</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> OcrSampleDocument</p>
OcrTemplateId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> ID of the OCR template associated with the OCR template sample document. This field is a relationship field.</p> <p><b>Relationship Name</b> OcrTemplate</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> OcrTemplate</p>

## Intelligent Form Reader Field on DocumentType

Standard and custom fields extend the standard DocumentType object for use in Intelligent Form Reader to represent information about document types for identity documents or other documents with information that you want to extract. This field is available in API version 57.0 and later.

### Supported Calls

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

### Fields

Field	Details
FormType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> 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.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>IDENTITY_DOCUMENT</code>—Identity Document</li> <li>• <code>USER_DEFINED_TYPE</code>—Other Forms</li> </ul>

#### SEE ALSO:

[Financial Services Cloud Developer Guide: DocumentType](#)

## Intelligent Form Reader Business APIs

Use the Intelligent Form Reader Business APIs to read the mapping details of the extracted text that is stored in a Salesforce object. Intelligent Form reader uses optical character recognition to automatically extract data from documents. You specify the kind of form you are getting data from, then map fields in the form to the appropriate fields in the Salesforce objects.

### Available Resources

Resource	Description
<a href="#">connect/form-reader/mapping</a>	Retrieve the mappings between the values of the keys extracted from the document to the Salesforce object fields with respect to a given template.
<a href="#">/connect/form-reader/contentDocuments/{contentDocumentId}/ocrTemplates/{ocrTemplateId}/targetObjectFieldMappings</a>	Retrieve mapping between the values of the keys extracted from the document with respect to an OCR template.
<a href="#">/connect/form-reader/ocrTemplates</a>	Retrieve a list of active OCR templates.

Resource	Description
<a href="#">/connect/form-reader/ocrTemplates/\${ocrTemplateId}</a>	Retrieve the details of an active OCR template by the template ID.
<a href="#">/connect/form-reader/contentDocuments/\${contentDocumentId}/ocrDocumentScanResults</a>	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.
<a href="#">/connect/form-reader/contentDocuments/\${contentDocumentId}/record</a>	Create records in Salesforce objects using a document based on a content document record.
<a href="#">/connect/form-reader/contentDocuments/\${contentDocumentId}/record/\${targetRecordId}</a>	Update an existing record in a Salesforce object using a document based on a content document record.
<a href="#">/connect/form-reader/receivedDocuments/\${receivedDocumentId}/record</a>	Create records in Salesforce objects using a document based on a received document record.
<a href="#">/connect/form-reader/receivedDocuments/\${receivedDocumentId}/record/\${targetRecordId}</a>	Update an existing record in a Salesforce object using a document based on a received document record.

#### REST Reference

You can access Intelligent Form Reader APIs using REST endpoints. These REST APIs follow similar conventions as Connect REST APIs.

## REST Reference

You can access Intelligent Form 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 Form Reader API resources.

#### Request Bodies

Here's a list of Intelligent Form Reader API request bodies.

#### Response Bodies

Here's a list of Intelligent Form Reader API response bodies.

#### SEE ALSO:

[Connect REST API Developer Guide](#)

## Resources

Here's a list of Intelligent Form Reader API resources.

#### Form 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.

## Form 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.

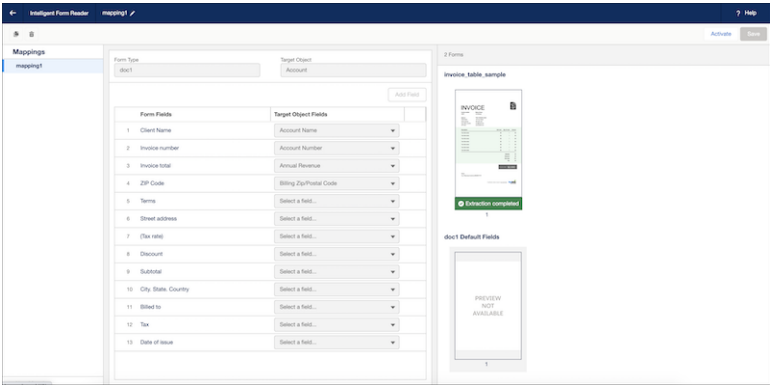
### Permission

To use this resource, you must have the EinsteinDocReader permission and the Intelligent Form 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

54.0

Requires Chatter

No

HTTP methods

POST

Request body for POST

JSON example

```
{
  "scanResultId" : "0ixS7000000001TIAQ",
  "templateId" : "48tS700000004C9DIAU"
}
```

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 ( <code>true</code> ) or not ( <code>false</code> ).  Default value is <code>true</code> .	Optional	55.0
scanResultId	String	The ID of the OCR document scan result. The scan result contains the contents of	Required	54.0

Name	Type	Description	Required or Optional	Available Version
		a document after optical character recognition (OCR) processing.		
templateId	String	The ID of the OCR template. This represents the details of the mapping between a document and a Salesforce object using Intelligent Form Reader.	Required	54.0

**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 ( <code>true</code> ) or not ( <code>false</code> ).  The default value is <code>false</code> .   <b>Note:</b> 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
startPageIndex	Integer	Page number in the document to start extraction.	Optional	55.0
ocrService	String	<div>Name of the service that gets the extraction results.</div> <div>Valid values are:</div> <ul style="list-style-type: none"><li>AMAZON_TEXTRACT—Indicates AWS Document service.</li><li>AMAZON_TEXTRACT_ANALYZED_ID—Indicates AWS Analyze ID service.</li></ul> <div>The default value is AMAZON_TEXTRACT.</div>	Optional	58.0

**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/48tRM000000000YN
```

**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 Form 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 ( <code>true</code> ) or not ( <code>false</code> ).  Default value is <code>false</code> .	Optional	55.0
documentTypeId	String	ID of the document type for the document checklist item.	Optional	55.0
fieldsWithoutConflictList	<a href="#">Fields Without Conflict Input[]</a>	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 ( <code>true</code> ) or not ( <code>false</code> ).  Default value is <code>false</code> .	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
<del>overrideConfidence</del> ScoreThreshold	Integer	Conflict confidence score threshold value for the extracted value.   <b>Note:</b> 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 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 Form 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 ( <code>true</code> ) or not ( <code>false</code> ).  Default value is <code>false</code> .	Optional	55.0
documentTypeId	String	ID of the document type for the document checklist item.	Optional	55.0
fieldsWithoutConflictList	<a href="#">Fields Without Conflict Input[]</a>	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 ( <code>true</code> ) or not ( <code>false</code> ).  Default value is <code>false</code> .	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
<del>overrideConfidence</del> ScoreThreshold	Integer	Conflict confidence score threshold value for the extracted value.   <b>Note:</b> 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": "0dexx00000000001",  
  "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	Optional	55.0

Name	Type	Description	Required or Optional	Available Version
		which are not present in the Intelligent Form Reader field mappings.		
attachDocument	Boolean	Indicates whether to automatically create the DocumentChecklistItem (DCI) and ContentDocumentLink records to link the document to the target object ( <code>true</code> ) or not ( <code>false</code> ).  Default value is <code>false</code> .	Optional	55.0
documentTypeId	String	ID of the document type for the document checklist item.	Optional	55.0
fieldsWithoutConflictList	<a href="#">Fields Without Conflict Input[]</a>	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 ( <code>true</code> ) or not ( <code>false</code> ).  Default value is <code>false</code> .	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.   <b>Note:</b> 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**


&lt;DocumentProcessInput&gt;

**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 Form 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 ( <code>true</code> ) or not ( <code>false</code> ).  Default value is <code>false</code> .	Optional	55.0

Name	Type	Description	Required or Optional	Available Version
documentTypeId	String	ID of the document type for the document checklist item.	Optional	55.0
fieldsWithoutConflictList	<a href="#">Fields Without Conflict Input[]</a>	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 ( <code>true</code> ) or not ( <code>false</code> ). Default value is <code>false</code> .	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
<del>overrideConfidence</del> ScoreThreshold	Integer	Conflict confidence score threshold value for the extracted value.   <b>Note:</b> 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](#)**Request Bodies**

Here's a list of Intelligent Form 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
<code>additionalFields</code>	<code>Map&lt;String, Object&gt;</code>	List of additional fields that you want to create or update in the target object and which are not present in the Intelligent Form Reader field mappings.	Optional	55.0
<code>attachDocument</code>	Boolean	Indicates whether to automatically create the <code>DocumentCheckListItem</code> (DCI) and <code>ContentDocumentLink</code> records to link the document to the target object ( <code>true</code> ) or not ( <code>false</code> ).  Default value is <code>false</code> .	Optional	55.0
<code>documentTypeId</code>	String	ID of the document type for the document checklist item.	Optional	55.0
<code>fieldsWithoutConflictList</code>	<a href="#">Fields Without Conflict Input</a>	List of fields that must not have any conflicts for the record creation or update process.	Optional	55.0
<code>ignoreFieldValueConflict</code>	Boolean	Indicates whether to ignore conflicts in OCR ( <code>true</code> ) or not ( <code>false</code> ).  Default value is <code>false</code> .	Optional	55.0
<code>linkedObjectId</code>	String	ID of the linked object record.	Optional	55.0
<code>objectApiName</code>	String	API name of the target object in which you want to create or update a record.	Optional	55.0
<code>overrideConfidenceScoreThreshold</code>	Integer	Conflict confidence score threshold value for the extracted value.   <b>Note:</b> The value of this field overrides the confidence score threshold value set on the user interface.	Optional	55.0
<code>recordTypeId</code>	String	ID of the record type of the target object.	Optional	55.0
<code>templateApiName</code>	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 ( <code>true</code> ) or not ( <code>false</code> ).  Default value is <code>true</code> .	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	54.0
templateId	String	The ID of the OCR template. This represents the details of the mapping between a document and a Salesforce object using Intelligent Form Reader.	Required	54.0

### Response Bodies

Here's a list of Intelligent Form 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 textextract.

[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 form 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 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 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": "0ixRM0000004DP1",
"ocrService": "AMAZON_TEXTTRACT",
"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	<a href="#">ODSR Detailed Output[]</a>	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

Property Name	Type	Description	Filter Group and Version	Available Version
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	<a href="#">Document Conflict Field[]</a>	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	<a href="#">Document Conflict Field List</a>	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 ( <code>true</code> ) or not ( <code>false</code> ).	Small, 55.0	55.0
message	String	The message of the create or update API request.	Small, 55.0	55.0
objectFieldList	<a href="#">Object Field List</a>	The list of fields that are created or updated in the target object record.	Small, 55.0	55.0

Property Name	Type	Description	Filter Group and Version	Available Version
ocrDocumentScanResultIdList	<a href="#">OCR Document Scan Result List</a>	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 textract.

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
formReaderTarget ObjectMappings	<a href="#">Form Reader Target Object Mappings[]</a>	List of mappings between the values of the keys extracted from the document to the Salesforce object fields for the given template.	Small, 54.0	54.0
status	Status	Indicates whether the request succeeded or failed, and also provides a message if there's failure.	Small, 54.0	54.0

## Form Reader Target Object Mappings

Output representation of the mappings between the text extracted by the form reader and the Salesforce object.

Property Name	Type	Description	Filter Group and Version	Available Version
formReaderObject FieldMapping	<a href="#">Form Reader Object Field Mapping[]</a>	List of mappings between the extracted text values and the fields of the Salesforce object.	Small, 54.0	54.0
targetObjectName	String	Name of the target object to which mappings are done.	Small, 54.0	54.0

Property Name	Type	Description	Filter Group and Version	Available Version
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, 54.0	54.0
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, 54.0	54.0
value	String	Value extracted from the form that is filled in the target field.	Small, 54.0	54.0

## Object Field

Output representation of 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	<a href="#">Object Field[]</a>	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 List

Output representation of the list of the OCR document scan results IDs.

Property Name	Type	Description	Filter Group and Version	Available Version
ocrDocumentScanResultIdList	<a href="#">OCR Document Scan Result[]</a>	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.	Small, 56.0	56.0
 <b>Note:</b> 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.				

## 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.	Small, 56.0	56.0
 <b>Note:</b> 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.				


## 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	<a href="#">Document Field</a>	Details of the field in a form whose value is extracted and mapped to a Salesforce object field.	Small, 55.0	55.0
ocrTargetObjectFields	<a href="#">OCR Target Object Field</a> on page 1243[]	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.	Small, 56.0	56.0
 <b>Note:</b> 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.				

## 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	<a href="#">OCR Target Object Output[]</a>	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	<a href="#">Key Value Pair[]</a>	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

Property Name	Type	Description	Filter Group and Version	Available Version
ocrService	String	<p>Name of the service that gets the extraction results.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> <li>• <code>AMAZON_TEXTTRACT</code>—Indicates AWS Document service.</li> <li>• <code>AMAZON_TEXTTRACT_ANALYZED_ID</code>—Indicates AWS Analyze ID service.</li> </ul> <p>The default value is <code>AMAZON_TEXTTRACT</code>.</p>	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	<a href="#">OCR Template Output[]</a>	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	<a href="#">OCR Sample Document[]</a>	List of OCR sample documents associated with the OCR template.	Small, 55.0	55.0



**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.

Property Name	Type	Description	Filter Group and Version	Available Version
ocrTargetObjectFieldMappings	OCR Target Object Field Mapping[]	List of OCR target object field mappings in the OCR template.   <b>Note:</b> 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	<a href="#">Template Detail</a>	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": "POST_SUCCESS",
    "message": "API call has been executed Successfully."
  }
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
<del>ocrDocumentScanResultInfos</del>	<a href="#">OCR Document Scan Result Info[]</a>	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

## Intelligent Form Reader 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 Form 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 Form Reader. This type extends the Metadata metadata type and inherits its `fullName` field.

## Flow for Intelligent Form 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 Form 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
<code>actionType</code>	InvokableActionType (enumeration of type string)	Required. The action type. Additional valid values only for Intelligent Form Reader include: <ul style="list-style-type: none"> <li><code>fetchActiveOcrTemplates</code>—Fetch all the active OCR templates present in an org. Available in API version 58.0 and later.</li> <li><code>fetchExtractedText</code>—Fetch the text extracted from an uploaded document. Available in API version 58.0 and later.</li> <li><code>initiateTextExtraction</code>—Extract text from the pages of an uploaded document. Available in API version 58.0 and later.</li> </ul>

## 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 52.0 and later.

## Special Access Rules

To use this metadata type, your Salesforce org must have the AWSTextract1000LimitAddOn license.

## Fields

Field Name	Field Type	Description
applicationType	OcrApplicationType (enumeration of type string)	The type of application using the OCR sample document.  Possible values are: <ul style="list-style-type: none"> <li>EinsteinDocumentReader</li> <li>Industries</li> </ul>
contentAsset	string	The ID of the OCR sample document asset.  This field is null if the OcrSampleDocument is an abstract document representing the DocumentType.
documentHeight	double	The normalized height of the OCR sample document page.  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	<a href="#">OcrSampleDocumentField</a>	The details of the field in a form whose value is extracted and mapped to a Salesforce object field.
ocrSampleDocumentPages	<a href="#">OcrSampleDocumentPage</a>	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 11: 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.

Field Name	Field Type	Description
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 ( <code>true</code> ) or not ( <code>false</code> ). Available in API version 57.0 and later.  This field helps to distinguish auto-extracted keys from manual ones.
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.  This field is null if the <code>OcrSampleDocument</code> is an abstract document representing the <code>DocumentType</code> .
ocrSampleDocumentPageItem	<a href="#">OcrTemplate</a>	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 12: 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	<a href="#">OcrSampleDocument</a>	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.

Field Name	Field Type	Description
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 13: Fields**

Field Name	Field Type	Description
hasHeader	boolean	Indicates whether the OCR sample document page item has a header ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> . 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.
type	ItemType (enumeration of type string)	Required. Specifies the type of OCR sample document page item. Available in API version 56.0 and later. Valid value is <code>TABLE</code> .

## 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>
  </ocrSampleDocumentFields>
  <ocrSampleDocument>image240</ocrSampleDocument>
  <ocrSampleDocumentPage>1</ocrSampleDocumentPage>
  <ocrSampleDocumentPageItem>
    <hasHeader>false</hasHeader>
    <sequenceNumber>1</sequenceNumber>
  </ocrSampleDocumentPageItem>
</OcrSampleDocument>
```

```

        <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 Form 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 52.0 and later.

## Special Access Rules

To use this metadata type, your Salesforce org must have the AWSTextract1000LimitAddOn license.

## Fields

Field Name	Field Type	Description
active	boolean	Indicates whether the OCR template is active ( <code>true</code> ) or not ( <code>false</code> ).
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.
ocrTargetObjects	<a href="#">OcrTargetObject[]</a>	Represents the details of the object to which information from a form is extracted and mapped.
ocrTemplateSampleDocuments	<a href="#">OcrTemplateSampleDocument[]</a>	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 14: Fields**

Field Name	Field Type	Description
ocrTargetObjectFieldMappings	<a href="#">OcrTargetObjFieldMapping[]</a>	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 15: Fields**

Field Name	Field Type	Description
ocrSampleDocField	<a href="#">OcrSampleDocumentField</a>	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: <ul style="list-style-type: none"> <li>FormField</li> <li>TableColumn</li> </ul> The default value is <code>FormField</code> .

## OcrSampleDocumentField

Represents the details of the field in a form whose value is extracted and mapped to a Salesforce object field.

**Table 16: 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.
isAutoExtractedValue	boolean	Indicates whether the key is automatically extracted ( <code>true</code> ) or not ( <code>false</code> ). Available in API version 57.0 and later.  This field helps to distinguish auto-extracted keys from manual ones.

Field Name	Field Type	Description
<code>keyContent</code>	string	The content in a particular area of the form, representing the field that is extracted by OCR.
<code>ocrSampleDocument</code>	string	Required. The associated OCR sample document is used as a reference while extracting and mapping information from a customer form.
<code>ocrSampleDocumentPage</code>	string	A collection of fields that define a page in the OCR sample document.
<code>ocrSampleDocumentPageItem</code>	<a href="#">OcrSampleDocumentPageItem</a>	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 17: Fields**

Field Name	Field Type	Description
<code>hasHeader</code>	boolean	Indicates whether the OCR sample document page item has a header ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> . Available in API version 56.0 and later.
<code>sequenceNumber</code>	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.
<code>title</code>	string	The title of the OCR sample document page item. Available in API version 56.0 and later.
<code>type</code>	ItemType (enumeration of type string)	Required. Specifies the type of OCR sample document page item. Valid value is <code>TABLE</code> . 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 18: Fields**

Field Name	Field Type	Description
<code>ocrSampleDocument</code>	string	The associated OCR sample document is 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](#).

## Intelligent Form Reader 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 52.0 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 52.0 and later.

### [OcrSampleDocumentPage](#)

Represents a collection of fields that define a page in the OCR sample document. This object is available in API version 52.0 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 52.0 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 52.0 and later.

### [OcrTemplate](#)

Represents the details of the mapping between a document and a Salesforce object using Intelligent Form Reader. This object is available in API version 52.0 and later.

### [OcrTemplateSampleDocument](#)

Represents a relationship between an OCR template and an OCR sample document. This object is available in API version 52.0 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 52.0 and later.



**Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

## Supported SOAP API Calls

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


## Supported REST API Methods

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

## Special Access Rules

To use this tooling API object, your Salesforce org must have the AWSTextract1000LimitAddOn license.

## Fields

Field	Details
ApplicationType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> The application associated with the OCR sample document. Available in API version 54.0 and later.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• EinsteinDocumentReader</li> <li>• Industries</li> </ul>
DeveloperName	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> 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.</p> <p> <b>Note:</b> 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.</p>
DocumentHeight	<p><b>Type</b> double</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> Normalized height of the OCR sample document page.</p>
FullName	<p><b>Type</b> string</p>

Field	Details
	<p><b>Properties</b> Create, Group, Nillable</p> <p><b>Description</b> Full name of the associated metadata type in Metadata API.</p> <p>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.</p>
Language	<p><b>Type</b> picklist</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Language of the OCR sample document.</p>
ManageableState	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Indicates the manageable state of the specified component that is contained in a package.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>beta</code>—Managed-Beta</li> <li>• <code>deleted</code>—Managed-Proposed-Deleted</li> <li>• <code>deprecated</code>—Managed-Proposed-Deprecated</li> <li>• <code>deprecatedEditable</code>—SecondGen-Installed-Deprecated</li> <li>• <code>installed</code>—Managed-Installed</li> <li>• <code>installedEditable</code>—SecondGen-Installed-Editable</li> <li>• <code>released</code>—Managed-Released</li> <li>• <code>unmanaged</code>—Unmanaged</li> </ul>
MasterLabel	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> Label of the OCR sample document.</p>
Metadata	<p><b>Type</b> complexvalue</p>

Field	Details
	<b>Properties</b> Create, Nillable, Update  <b>Description</b> OCR sample document metadata.
NamespacePrefix	<b>Type</b> string  <b>Properties</b> Filter, Group, Nillable, Sort  <b>Description</b> 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 52.0 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	<b>Type</b> int  <b>Properties</b> Create, Filter, Group, in Nillable, Sort, Update  <b>Description</b> 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.

Field	Details
CellColumnSpanValue	<p><b>Type</b> int</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> 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.</p>
CellRowNumber	<p><b>Type</b> int</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> 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.</p>
CellRowSpanValue	<p><b>Type</b> int</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> 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.</p>
FieldLabelMaxX	<p><b>Type</b> double</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> A normalized coordinate representing the right edge of the bounding box of the key.</p>
FieldLabelMaxY	<p><b>Type</b> double</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> A normalized coordinate representing the bottom edge of the bounding box of the key.</p>
FieldLabelMinX	<p><b>Type</b> double</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p>

Field	Details
	<b>Description</b> A normalized coordinate representing the left edge of the bounding box of the key.
FieldLabelMinY	<b>Type</b> double <b>Properties</b> Create, Filter, Nillable, Sort, Update <b>Description</b> A normalized coordinate representing the top edge of the bounding box of the key.
IsAutoExtracted	<b>Type</b> boolean <b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update <b>Description</b> Indicates whether the OCR sample document field is auto-extracted by the OCR service ( <code>true</code> ) or not ( <code>false</code> ). Available in API version 57.0 and later. The default value is <code>false</code> .
ItemType	<b>Type</b> picklist <b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort <b>Description</b> The type of item associated with the OCR sample document field. Available in API version 56.0 and later. Possible value is <code>TABLE</code> .
KeyContent	<b>Type</b> string <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> Content located in a particular area of the document.
OcrSampleDocumentId	<b>Type</b> reference <b>Properties</b> Create, Filter, Group, Sort <b>Description</b> ID of the associated OCR sample document.

Field	Details
	<p>This is a relationship field.</p> <p><b>Relationship Name</b> OcrSampleDocument</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> OcrSampleDocument</p>
OcrSampleDocumentPageId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> ID of the associated OCR sample document page.  This is a relationship field.</p> <p><b>Relationship Name</b> OcrSampleDocumentPage</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> OcrSampleDocumentPage</p>
OcrSampleDocumentPageItemId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> 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.</p> <p><b>Relationship Name</b> OcrSampleDocumentPageItem</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> OcrSampleDocumentPageItem</p>

## OcrSampleDocumentPage

Represents a collection of fields that define a page in the OCR sample document. This object is available in API version 52.0 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
<code>ManageableState</code>	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Indicates the manageable state of the specified component that is contained in a package. Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>beta</code>—Managed-Beta</li> <li>• <code>deleted</code>—Managed-Proposed-Deleted</li> <li>• <code>deprecated</code>—Managed-Proposed-Deprecated</li> <li>• <code>deprecatedEditable</code>—SecondGen-Installed-Deprecated</li> <li>• <code>installed</code>—Managed-Installed</li> <li>• <code>installedEditable</code>—SecondGen-Installed-Editable</li> <li>• <code>released</code>—Managed-Released</li> <li>• <code>unmanaged</code>—Unmanaged</li> </ul>
<code>OcrSampleDocumentId</code>	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> ID of the OCR sample document. This is a relationship field.</p> <p><b>Relationship Name</b> <code>OcrSampleDocument</code></p> <p><b>Relationship Type</b> Lookup</p>

Field	Details
	<b>Refers To</b> OcrSampleDocument
PageHeight	<b>Type</b> double <b>Properties</b> Create, Filter, Nillable, Sort, Update <b>Description</b> Normalized height of the OCR sample document page.
PageNumber	<b>Type</b> int <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> 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()`, `describeObjects()`, `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	<b>Type</b> boolean <b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update <b>Description</b> Indicates whether the OCR sample document page item has a header.

Field	Details
	The default value is <code>false</code> .
<code>ManageableState</code>	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Indicates the manageable state of the specified component that is contained in a package. Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>beta</code>—Managed-Beta</li> <li>• <code>deleted</code>—Managed-Proposed-Deleted</li> <li>• <code>deprecated</code>—Managed-Proposed-Deprecated</li> <li>• <code>deprecatedEditable</code>—SecondGen-Installed-Deprecated</li> <li>• <code>installed</code>—Managed-Installed</li> <li>• <code>installedEditable</code>—SecondGen-Installed-Editable</li> <li>• <code>released</code>—Managed-Released</li> <li>• <code>unmanaged</code>—Unmanaged</li> </ul>
<code>OcrSampleDocumentPageId</code>	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> ID of the OCR sample document page associated with the page item. This field is a relationship field.</p> <p><b>Relationship Name</b> <code>OcrSampleDocumentPage</code></p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> <code>OcrSampleDocumentPage</code></p>
<code>SequenceNumber</code>	<p><b>Type</b> int</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The sequence number of the item on an OCR sample document page with multiple items.</p>

Field	Details
Title	<b>Type</b> string <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> Title of the OCR sample document page item.
Type	<b>Type</b> picklist <b>Properties</b> Create, Filter, Group, Restricted picklist, Sort, Update <b>Description</b> Specifies the type of OCR sample document page item. Possible values is <code>TABLE</code> .

## OcrTargetObject

Represents the details of the object to which information from a document is extracted and mapped. This object is available in API version 52.0 and later.

### Supported SOAP API Calls

`create()`, `delete()`, `describeObjects()`, `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	<b>Type</b> picklist <b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort <b>Description</b> Indicates the manageable state of the specified component that is contained in a package.

Field	Details
	<p>Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>beta</code>—Managed-Beta</li> <li>• <code>deleted</code>—Managed-Proposed-Deleted</li> <li>• <code>deprecated</code>—Managed-Proposed-Deprecated</li> <li>• <code>deprecatedEditable</code>—SecondGen-Installed-Deprecated</li> <li>• <code>installed</code>—Managed-Installed</li> <li>• <code>installedEditable</code>—SecondGen-Installed-Editable</li> <li>• <code>released</code>—Managed-Released</li> <li>• <code>unmanaged</code>—Unmanaged</li> </ul>
<code>OcrTemplateId</code>	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> The ID of the associated OCR template. This is a relationship field.</p> <p><b>Relationship Name</b> OcrTemplate</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> OcrTemplate</p>
<code>TargetObject</code>	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> The object to which information from a document is mapped. The list below is only a representative list of objects. The exact list of supported objects depends on the license configuration in the org.</p>
<code>TargetObjectRecordType</code>	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> 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.</p>

## 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 52.0 and later.

### Supported SOAP API Calls

`create()`, `delete()`, `describeObjects()`, `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
<code>IsActive</code>	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> Indicates whether the field mapping is active. The default value is <code>false</code>.</p>
<code>ManageableState</code>	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Indicates the manageable state of the specified component that is contained in a package. Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>beta</code>—Managed-Beta</li> <li>• <code>deleted</code>—Managed-Proposed-Deleted</li> <li>• <code>deprecated</code>—Managed-Proposed-Deprecated</li> <li>• <code>deprecatedEditable</code>—SecondGen-Installed-Deprecated</li> <li>• <code>installed</code>—Managed-Installed</li> <li>• <code>installedEditable</code>—SecondGen-Installed-Editable</li> <li>• <code>released</code>—Managed-Released</li> <li>• <code>unmanaged</code>—Unmanaged</li> </ul>

Field	Details
OcrSampleDocFieldId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> ID of the associated OCR sample document field. This is a relationship field.</p> <p><b>Relationship Name</b> OcrSampleDocField</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> OcrSampleDocumentField</p>
OcrTargetObjectId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> ID of the target object. This is a relationship field.</p> <p><b>Relationship Name</b> OcrTargetObject</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> OcrTargetObject</p>
TargetField	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> 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 <code>TargetObject</code> field of <code>OcrTargetObject</code>. Not all fields of these supported objects are available for mapping.</p>
Type	<p><b>Type</b> picklist</p>

Field	Details
	<p><b>Properties</b> Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> The type of document field that's mapped to the target object. Available in API version 56.0 and later.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>FormField</code></li> <li>• <code>TableColumn</code></li> </ul> <p>The default value is <code>FormField</code>.</p>

## OcrTemplate

Represents the details of the mapping between a document and a Salesforce object using Intelligent Form Reader. This object is available in API version 52.0 and later.



**Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

## Supported SOAP API Calls

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

## Supported REST API Methods


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

## Special Access Rules

To use this tooling API object, your Salesforce org must have the `AWSTextract1000LimitAddOn` license.

## Fields

Field	Details
Description	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> Description of the OCR template.</p>
DeveloperName	<p><b>Type</b> string</p>

Field	Details
	<p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> 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.</p> <p> <b>Note:</b> When creating large sets of data, always specify a unique <code>DeveloperName</code> for each record. If no <code>DeveloperName</code> is specified, performance slows down while Salesforce generates one for each record.</p>
FullName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Group, Nillable</p> <p><b>Description</b> The full name of the associated metadata type in Metadata API.</p> <p>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.</p>
IsActive	<p><b>Type</b> boolean</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Sort</p> <p><b>Description</b> Indicates whether this OCR template is active (<code>true</code>) or not (<code>false</code>).</p>
Language	<p><b>Type</b> picklist</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Language of the OCR template.</p>
ManageableState	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p>

Field	Details
	<p><b>Description</b></p> <p>Indicates the manageable state of the specified component that is contained in a package.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>beta</code>—Managed-Beta</li> <li>• <code>deleted</code>—Managed-Proposed-Deleted</li> <li>• <code>deprecated</code>—Managed-Proposed-Deprecated</li> <li>• <code>deprecatedEditable</code>—SecondGen-Installed-Deprecated</li> <li>• <code>installed</code>—Managed-Installed</li> <li>• <code>installedEditable</code>—SecondGen-Installed-Editable</li> <li>• <code>released</code>—Managed-Released</li> <li>• <code>unmanaged</code>—Unmanaged</li> </ul>
MasterLabel	<p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Filter, Group, Sort</p> <p><b>Description</b></p> <p>Label of the optical character reader (OCR) template.</p>
Metadata	<p><b>Type</b></p> <p>complexvalue</p> <p><b>Properties</b></p> <p>Create, Nillable, Update</p> <p><b>Description</b></p> <p>OCR template metadata.</p>
NamespacePrefix	<p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Filter, Group, Nillable, Sort</p> <p><b>Description</b></p> <p>Namespace prefix associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix.</p>
PageCount	<p><b>Type</b></p> <p>int</p> <p><b>Properties</b></p> <p>Filter, Group, Nillable, Sort</p> <p><b>Description</b></p> <p>Number of pages in the document from which information is extracted.</p>

Field	Details
TemplateName	<b>Type</b> string <b>Properties</b> Filter, Group, Nillable, Sort <b>Description</b> 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 52.0 and later.

### Supported SOAP API Calls

`create()`, `delete()`, `describeObjects()`, `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	<b>Type</b> picklist <b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort <b>Description</b> Indicates the manageable state of the specified component that is contained in a package. Possible values are: <ul style="list-style-type: none"> <li>• <code>beta</code>—Managed-Beta</li> <li>• <code>deleted</code>—Managed-Proposed-Deleted</li> <li>• <code>deprecated</code>—Managed-Proposed-Deprecated</li> <li>• <code>deprecatedEditable</code>—SecondGen-Installed-Deprecated</li> <li>• <code>installed</code>—Managed-Installed</li> <li>• <code>installedEditable</code>—SecondGen-Installed-Editable</li> <li>• <code>released</code>—Managed-Released</li> <li>• <code>unmanaged</code>—Unmanaged</li> </ul>

Field	Details
OcrSampleDocumentId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> ID of the associated OCR sample document. This is a relationship field.</p> <p><b>Relationship Name</b> OcrSampleDocument</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> OcrSampleDocument</p>
OcrTemplateId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> ID of the associated OCR template. This is a relationship field.</p> <p><b>Relationship Name</b> OcrTemplate</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> OcrTemplate</p>

## Intelligent Form Reader Standard Invocable Actions

Intelligent Form 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/vxx.x/actions/standard/fetchActiveOcrTemplates`

**Formats**

JSON, XML


**HTTP Methods**

POST

**Authentication**

Authorization: Bearer *token*

### Inputs

Input	Details
documentTypeId	<b>Type</b> string  <b>Description</b> Optional. The ID of the document type associated with the OCR template.   <b>Note:</b> You can specify up to 20 document type IDs.
targetObjects	<b>Type</b> string  <b>Description</b> Optional. The comma-separated list of target object API names associated with the OCR template.

## Outputs

Output	Details
ocrTemplates	<p><b>Type</b></p> <p>string</p> <p><b>Description</b></p> <p>The comma-separated list of OCR template records that match the specified document type ID and target objects.</p>

## 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/vXX.X/actions/standard/fetchExtractedText`

### Formats

JSON, XML



### HTTP Methods

POST

### Authentication

Authorization: Bearer *token*

Inputs

Input	Details
contentDocumentId	<p><b>Type</b></p> <p>string</p> <p><b>Description</b></p> <p>Required. The unique content document ID of the uploaded document to get the extracted text.</p> <p> <b>Note:</b> You can specify up to 20 content document IDs.</p>
endPageIndex	<p><b>Type</b></p> <p>Integer</p> <p><b>Description</b></p> <p>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.</p>
startPageIndex	<p><b>Type</b></p> <p>Integer</p> <p><b>Description</b></p> <p>Optional. The page number to start fetching the extracted text. The default value is 1.</p> <p> <b>Note:</b> You can fetch the extracted text from up to 20 pages of a specified document.</p>

Outputs

Output	Details
ocrDocumentScanResultDetails	<p><b>Type</b></p> <p>string</p> <p><b>Description</b></p> <p>The details of the extracted document including key value pairs of the extracted text, bounding box coordinates, and extraction confidence for the specified documents.</p> <p>This output is an Apex output type that contains nested arrays in JSON format. The <code>ocrDocumentScanResultDetails</code> output contains an array of the <code>OcrDocumentScanResultDetailsList</code> Apex class.</p>

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_TEXTTRACT",
            "ocrDocumentScanResultId":"0ixT100000000bv",
            "keyValuePair":{
              {
                "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 Form 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/vXX.X/actions/standard/initiateTextExtraction`

**Formats**  
JSON, XML

**HTTP Methods**  
POST

**Authentication**  
`Authorization: Bearer token`

Inputs

Input	Details
configurationAPIName	<p><b>Type</b> string</p> <p><b>Description</b> For internal use only.</p>
contentDocumentId	<p><b>Type</b> string</p> <p><b>Description</b> Required. The unique content document ID of the uploaded document to initiate text extraction.</p> <p>You can specify up to 20 content Document IDs.</p>
documentTypeId	<p><b>Type</b> string</p> <p><b>Description</b> 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.</p>
endPageIndex	<p><b>Type</b> integer</p> <p><b>Description</b> Optional. The page number up to which the text must be extracted. The default value is the last page number in the specified document.</p>

Input	Details
ocrService	<p><b>Type</b></p> <p>picklist</p> <p><b>Description</b></p> <p>Optional. The name of the OCR service that extracts text from the document. Valid values are:</p> <ul style="list-style-type: none"><li>• AMAZON_TEXTTRACT—Indicates the AWS Document service.</li><li>• AMAZON_TEXTTRACT_ANALYZE_ID—Indicates the AWS Analyze ID service.</li><li>• AMAZON_TEXTTRACT_DETECT_TEXT—Indicates the AWS Detect service that displays the text detected in a document.</li><li>• PDF_DOCX_EXTRACT_TEXT—Indicates the AWS Extract service that automatically extracts content from PDF files.</li></ul> <p>Required if the documentTypeId property isn't specified. The ocrService is retrieved based on the documentTypeId property.</p>
startPageIndex	<p><b>Type</b></p> <p>integer</p> <p><b>Description</b></p> <p>Optional. The page number to start text extraction. By default, the starting page number is 1.</p> <p>You can extract text from up to 20 pages in a specified document.</p>

## Outputs

Output	Details
ocrDocumentScanResultDetails	<p><b>Type</b></p> <p>string</p> <p><b>Description</b></p> <p>A comma-separated list containing an OcrDocumentScanResult ID and a page number for each extracted page of the specified document.</p>

## Example

### Sample Request

```
{
  "inputs": [
    {
      "contentDocumentId": "069T10000004FnoIAE",
      "startPageIndex": 1,
      "endPageIndex": 20,
      "ocrService": "AMAZON_TEXTTRACT",
      "documentTypeId": "0deT10000004CCbIAM"
    }
  ]
}
```

```
    }
  ]
}
```

Sample Response

```
[
  {
    "actionName": "initiateTextExtraction",
    "errors": null,
    "isSuccess": true,
    "outputValues": {
      "ocrDocumentScanResultDetails": {
        "ocrDocumentScanResults": [
          {
            "pageNumber": 1,
            "ocrDocumentScanResultId": "0ixT100000000bv"
          }
        ]
      }
    },
    "version": 1
  }
]
```

# Interest Tagging

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

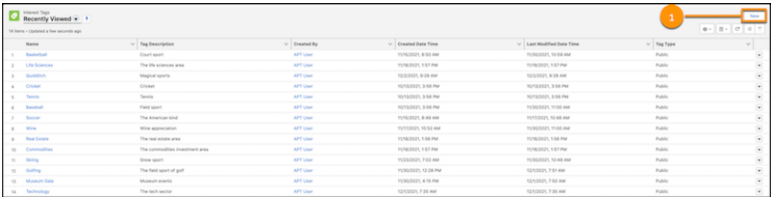
Use the Interest Tagging Business APIs to give users a seamless API experience for Interest Tags.

# 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:

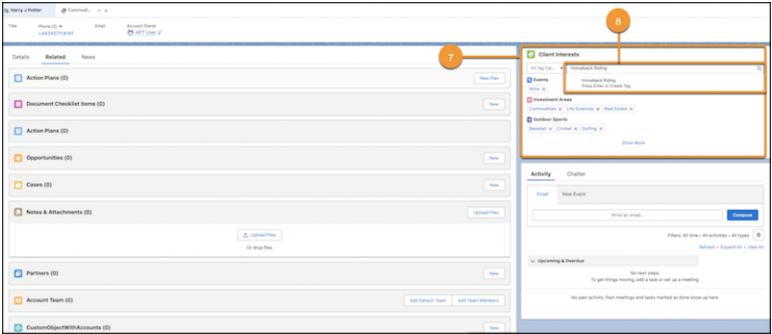
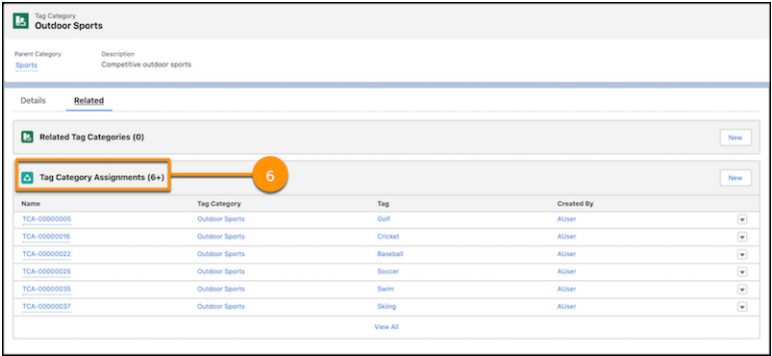
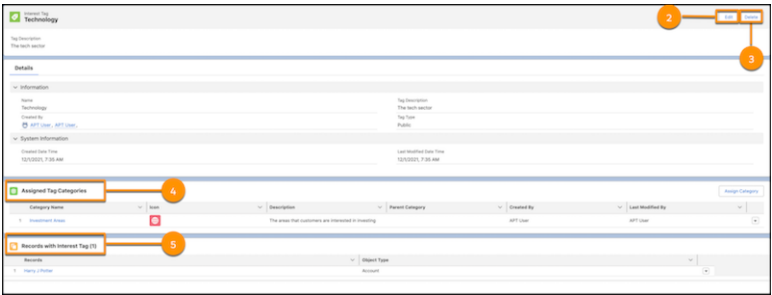


Name	Tag Description	Created By	Created Date Time	Last Modified Date Time	Tag Type
1. Bookshelf	Book shelf	API User	15/03/2015, 9:10 AM	15/03/2015, 9:10 AM	Public
2. Life Insurance	The life insurance area	API User	15/03/2015, 9:10 AM	15/03/2015, 9:10 AM	Public
3. Quilted	Quilted words	API User	15/03/2015, 9:10 AM	15/03/2015, 9:10 AM	Public
4. Carpet	Carpet	API User	15/03/2015, 9:10 AM	15/03/2015, 9:10 AM	Public
5. Tennis	Tennis	API User	15/03/2015, 9:10 AM	15/03/2015, 9:10 AM	Public
6. Bookshelf	Book shelf	API User	15/03/2015, 9:10 AM	15/03/2015, 9:10 AM	Public
7. Carpet	The carpeted area	API User	15/03/2015, 9:10 AM	15/03/2015, 9:10 AM	Public
8. Tennis	Tennis	API User	15/03/2015, 9:10 AM	15/03/2015, 9:10 AM	Public
9. Bookshelf	Book shelf	API User	15/03/2015, 9:10 AM	15/03/2015, 9:10 AM	Public
10. Carpet	The carpeted area	API User	15/03/2015, 9:10 AM	15/03/2015, 9:10 AM	Public
11. Tennis	Tennis	API User	15/03/2015, 9:10 AM	15/03/2015, 9:10 AM	Public
12. Bookshelf	Book shelf	API User	15/03/2015, 9:10 AM	15/03/2015, 9:10 AM	Public
13. Carpet	The carpeted area	API User	15/03/2015, 9:10 AM	15/03/2015, 9:10 AM	Public
14. Tennis	Tennis	API User	15/03/2015, 9:10 AM	15/03/2015, 9:10 AM	Public
15. Bookshelf	Book shelf	API User	15/03/2015, 9:10 AM	15/03/2015, 9:10 AM	Public
16. Carpet	The carpeted area	API User	15/03/2015, 9:10 AM	15/03/2015, 9:10 AM	Public
17. Tennis	Tennis	API User	15/03/2015, 9:10 AM	15/03/2015, 9:10 AM	Public

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	<a href="/connect/interest-tags/tags">/connect/interest-tags/tags</a>	Create an Interest Tag.
2	<a href="/connect/interest-tags/tags/\${tagId}">/connect/interest-tags/tags/\${tagId}</a>	Update an Interest Tag.
3	<a href="/connect/interest-tags/tags?tagId=tagId1">/connect/interest-tags/tags?tagId=tagId1</a>	Delete Interest Tags by tag IDs.

Label Number in the UI	Resource	Description
4	<a href="#">/connect/interest-tags/categories</a>	Retrieve a list of categories assigned to an Interest Tag.
5	<a href="#">/connect/interest-tags/assignments/tag/\${tagId}</a>	Retrieve a list of assignments by an Interest Tag ID.
6	<a href="#">/connect/interest-tags/tags?categoryId={categoryId}</a>	Retrieve a list of Interest Tags by a tag category ID.
7	<a href="#">/connect/interest-tags/assignments/entity/\${recordId}</a>	Retrieve a list of interest tags grouped by tag categories that are assigned to a Salesforce object record.
8	<a href="#">/connect/interest-tags/assignments</a>	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: <ul style="list-style-type: none"> <li>Request the first 15 with an offset of 0.</li> <li>Request the second 15 with an offset of 15.</li> </ul>	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

Name	Type	Description	Required or Optional	Available Version
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 network group",
  "tagName": "High network",
  "addCategoryIds": [
    "0ZOi000001CkbWugnd",
    "0ZOi000001CkbWugne",
    "0ZOi000001CkbWugnfn"
  ],
  "removeCategoryIds": [
    "0ZOi000001CkbWnnnnn",
  ]
}
```

**Properties**

Name	Type	Description	Required or Optional	Available Version
addCategoryIds	String[]	The categories to assign to an Interest Tag.	Optional	54.0

Name	Type	Description	Required or Optional	Available Version
<code>removeCategoryIds</code>	String[]	The categories to remove from an Interest Tag.	Optional	54.0
<code>tagDescription</code>	String	The description of an Interest Tag.	Optional	54.0
<code>tagName</code>	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
<code>limit</code>	Integer	The maximum number of tag categories to return in the response.	Optional	54.0
<code>offset</code>	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 tag categories at a time: <ul style="list-style-type: none"> <li>Request the first 15 with an offset of 0.</li> <li>Request the second 15 with an offset of 15.</li> </ul>	Optional	54.0
<code>orderBy</code>	String	Order the results to display by the tag category name.	Optional	54.0

Parameter Name	Type	Description	Required or Optional	Available Version
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 last batch retrieved. For example, to retrieve 15 Interest Tags at a time: <ul style="list-style-type: none"> <li>Request the first 15 with an offset of 0.</li> <li>Request the second 15 with an offset of 15.</li> </ul>	Optional	54.0
orderBy	String	Order the results to display by Interest Tags name.	Optional	54.0

Parameter Name	Type	Description	Required or Optional	Available Version
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: <ul style="list-style-type: none"> <li>Request the first 15 with an offset of 0.</li> <li>Request the second 15 with an offset of 15.</li> </ul>	Optional	54.0
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/v**XX.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	<a href="#">Records For Tag Input</a>	List of Salesforce object record IDs to assign to an Interest Tag.	Optional	54.0
tagsForRecord	<a href="#">Tags For Record Input</a>	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	<a href="#">Records For Tag Input</a>	List of Salesforce object record IDs to assign to an Interest Tag.	Optional	54.0
tagsForRecord	<a href="#">Tags For Record Input</a>	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

Name	Type	Description	Required or Optional	Available Version
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	<a href="#">Tag Category</a> []	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 ( <code>true</code> ) or not ( <code>false</code> ).	Small, 54.0	54.0
isSuccess	Boolean	Indicates whether the assignment request was successful ( <code>true</code> ) or not ( <code>false</code> ).	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	<a href="#">Interest Tag Create Result</a> []	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 ( <code>true</code> ) or not ( <code>false</code> ).	Small, 54.0	54.0
isSuccess	Boolean	Indicates whether the create request was successful ( <code>true</code> ) or not ( <code>false</code> ).	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" : "0qRxx0000000001dEAA",
      "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	<a href="#">Interest Tag[]</a>	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 ( <code>true</code> ) or not ( <code>false</code> ).	Small, 54.0	54.0
isUpdated	Boolean	Indicates whether an Interest Tag was updated ( <code>true</code> ) or not ( <code>false</code> ).	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" : "0qRxx000000004TREAY",
    "icon" : "custom:custom45",
    "name" : "LiCate13",
    "parentCategoryId" : "0qRxx000000004GXEAY",
    "tagCategoryAssignmentId" : "0qTx000000006JxEAI"
  } ]
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
categories	<a href="#">Tag Category with Parent</a> []	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" : "0qRxx000000004TREAY",
  "icon" : "custom:custom45",
  "name" : "LiCate13",
  "parentCategoryId" : "0qRxx000000004GXEAY",
}
```

```
{
  "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
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	<a href="#">Tag Record Assignment[]</a>	List of record assignments for an Interest Tag.	Small, 54.0	54.0

## Omnistudio Business APIs

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.

### [REST Reference](#)

You can access Omnistudio APIs using REST endpoints. These REST APIs follow similar conventions as Connect REST APIs.

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/01Ixx000000001dEAA
```

#### 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": "0k0xx00000000H1AAI",
  "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
<del>calculationProcedureId</del>	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	<a href="#">Calculation Procedure Resource[]</a>	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 ( <code>true</code> ) for execution or not ( <code>false</code> ). The default is <code>false</code> .  <b>Note:</b> 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	Type	Description	Required or Optional	Available Version
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, <a href="#">Calculation Procedure Step Input</a> >	The list of steps defined in the expression set version record.	Optional	53.0
variables	<a href="#">Calculation Procedure Resource</a> []	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	<a href="#">Simulation Config Input</a>	Configuration details for the simulation.	Required	53.0
contextInput	<a href="#">Simulation Context Input</a>	Context details for the simulation.	Required	58.0
input	<a href="#">Simulation Variable Input[]</a>	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": "0k0xx00000000H1AAI",
  "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\": \"0klxx00000000KzAAI\",
    \"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



Name	Type	Description	Required or Optional	Available Version
constants	<a href="#">Calculation Procedure Resource[]</a>	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 ( <code>true</code> ) for execution or not ( <code>false</code> ). The default is <code>false</code> .   <b>Note:</b> 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, <a href="#">Calculation Procedure Step Input</a> >	The list of steps defined in the expression set version record.	Optional	53.0
variables	<a href="#">Calculation Procedure Resource[]</a>	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




## 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  <b>Note:</b> This field is required when the step type is <code>MatrixLookup</code> .	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 <code>childStepIds</code> that is marked to bypass. Specify <code>"conditionUiFormattedText":{"bypass":{"0x00000000A"}}"</code> 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  <b>Note:</b> This field is required for the update request.	53.0
inputVariablesFormattedText	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 <code>false</code> .	Optional	53.0

Name	Type	Description	Required or Optional	Available Version
name	String	The name of the expression set version record step.	Optional	53.0
outputVariablesFormat	String	The output variables in JSON format returned by an expression set version record step.	Required	53.0
outputVariableMapping	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  <b>Note:</b> This field is required when the step type is <code>MatrixLookup</code> or <code>ReferenceProcedure</code> .	53.0
referenceCalculationProcedureId	String	The ID of the sub-calculation procedure version record.	Optional  <b>Note:</b> This field is required when the step type is <code>ReferenceProcedure</code> .	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.   <b>Note:</b> In version 53.0 and later, only calculation is supported.	Required	53.0
stepType	String	Specify the step type in the expression set version. Possible values are: <ul style="list-style-type: none"> <li>• <code>Condition</code></li> <li>• <code>Calculation</code></li> <li>• <code>MatrixLookup</code></li> <li>• <code>ReferenceProcedure</code></li> <li>• <code>Branch</code></li> <li>• <code>ConditionalGroup</code></li> </ul>	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
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: <ul style="list-style-type: none"><li>• Boolean</li><li>• Currency</li><li>• Date</li><li>• Number</li><li>• Percent</li><li>• Text</li></ul>	Required	53.0

Name	Type	Description	Required or Optional	Available Version
defaulttValue	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	53.0
			 <b>Note:</b> This field is required for the update request.	
isEditable	Boolean	Indicates whether the variable or constant is editable.	Optional	53.0
		 <b>Note:</b> This field is for user-interface use only.		
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	53.0
			 <b>Note:</b> This field is required when the data type is number, currency, or percentage	
uiDisplayOrder	Integer	The display order of the variable or constant in the UI.	Optional	53.0
		 <b>Note:</b> Reserved for future use.		

## 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	<a href="#">Simulation Version Info Input</a>	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	<a href="#">Simulation Config Input</a>	Configuration details for the simulation.	Required	53.0
contextInput	<a href="#">Simulation Context Input</a>	Context details for the simulation.	Required	58.0
input	<a href="#">Simulation Variable Input[]</a>	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: <ul style="list-style-type: none"><li>• Boolean</li><li>• Currency</li><li>• Date</li><li>• Number</li><li>• Percent</li><li>• Text</li></ul>	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
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	<a href="#">Calculation Procedure Variable Output[]</a>	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
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	<a href="#">Calculation Procedure Variable Output[]</a>	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	<a href="#">Calculation Procedure Output[]</a>	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": "0k0xx00000000H1AAI",
  "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": "0klxx00000000KzAAI",
  "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
constants	<a href="#">Resource List Output</a>	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,	Small, 53.0	53.0

Property Name	Type	Description	Filter Group and Version	Available Version
		the record that's ranked higher takes precedence. 1 denotes the highest rank.		
root	<a href="#">Root Step List Output</a>	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	<a href="#">Calculation Procedure Step Map Output</a>	The list of steps defined in the expression set version record.	Small, 53.0	53.0
variables	<a href="#">Resource List Output</a>	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	<a href="#">Resource Output []</a>	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

Property Name	Type	Description	Filter Group and Version	Available Version
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, <a href="#">Calculation Procedure Step Output</a> >	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
calculation MatrixId	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
conditions ExpressionText	String	User-defined expression text used in a condition step.	Small, 53.0	53.0
conditionsUi FormattedText	String	Additional information required to render the condition expression text. For example, when the current step has a subset of <code>childStepIds</code> that is marked to bypass. The code <code>"conditionsUi": {"bypass": [{"childStepId": "00000000000000000000000000000000"}]}</code> 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
failed Explainer TemplateId	String	ID of the failed explainability message template in the Decision Table lookup procedure step.	Small, 56.0	56.0
failedMessage TokenMappings	<a href="#">Expression Set DES Token Mapping</a>	List of the token resource mappings of the failed explainability message template.	Small, 59.0	59.0
formula Expression Text	String	The formula used in a calculation step.	Small, 53.0	53.0
formulaUi FormattedText	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
inputVariables FormatText	String	The input variables in JSON format required to execute an expression set version record step.	Small, 53.0	53.0
isResult Included	Boolean	Indicates whether the result of a step execution is returned to the user. The default is <code>false</code> .	Small, 53.0	53.0

Property Name	Type	Description	Filter Group and Version	Available Version
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	<a href="#">Expression Set DES Token Mapping</a>	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	<a href="#">Expression Set DES Token Mapping</a>	List of the token resource mappings of the passed explainability message template.	Small, 59.0	59.0
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.  <b>Note:</b> This field is applicable when the step type is <code>Condition</code> .	Small, 53.0	53.0
stage	String	Indicates whether the expression set version step is a calculation or an aggregation.  <b>Note:</b> 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: <ul style="list-style-type: none"><li>• <code>Condition</code></li><li>• <code>Calculation</code></li><li>• <code>MatrixLookup</code></li><li>• <code>ReferenceProcedure</code></li></ul>	Small, 53.0	53.0

Property Name	Type	Description	Filter Group and Version	Available Version
		<ul style="list-style-type: none"><li>• Branch</li><li>• ConditionalGroup</li></ul>		

## 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	<a href="#">Simulation Error Output</a>	Error details of the simulation, if any.	Small, 53.0	53.0

Property Name	Type	Description	Filter Group and Version	Available Version
executionId	String	Execution ID generated after a successful request.	Small, 53.0	53.0
output	<a href="#">Simulation Runtime Output</a> on page 1343	Results of the expression set from the simulation.	Small, 54.0	54.0
simulationResults	<a href="#">Simulation Variable Output</a> []	List of output variables of the simulation.	Small, 53.0	53.0
simulationStepResults	Map<String, <a href="#">Simulation Step Result Output</a> >	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 <code>Aggregation</code> .	Small, 54.0	54.0
calculationResults	Map<String, String>[]	Calculation results of the expression set from the simulation when the step type is <code>Calculation</code> .	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
contextTag Messages	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
showCondition Details	Boolean	For the <code>Condition</code> step type, this property indicates whether the decision explanation includes the condition's details ( <code>true</code> ) or not ( <code>false</code> ). The default value for this field is <code>false</code> .	Small, 56.0	56.0
showOnly ExecutedPath Message	Boolean	For the <code>Branch</code> step type, this property indicates whether the decision explanation includes information about the executed	Small, 56.0	56.0

Property Name	Type	Description	Filter Group and Version	Available Version
		path only ( <code>true</code> ) or not ( <code>false</code> ). The default value for this field is <code>true</code> .		
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: <ul style="list-style-type: none"><li>• Boolean</li><li>• Currency</li><li>• Date</li><li>• Number</li><li>• Percent</li><li>• Text</li></ul>	Small, 53.0	53.0
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
inputVariables	<a href="#">Simulation Input Variables Basic[]</a>	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: <ul style="list-style-type: none"> <li>DecisionMatrix</li> <li>SubProcedure</li> </ul>	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	<a href="#">Simulation Step Additional Info Output</a>	Additional information if the step type is decision matrix or sub expression.	Small, 53.0	53.0
explainabilityMessage	<a href="#">Simulation Step Explainability Message Output</a>	Decision explanation message for a step.	Small, 56.0	56.0
isDefaulted	Boolean	Indicates whether the step has default values ( <code>true</code> ) or not ( <code>false</code> ).	Small, 57.0	57.0
stepErrors	Map<String, String>	Errors occurred in a step.	Small, 54.0	54.0
stepInputs	<a href="#">Simulation Variable Output[]</a>	Input variables of a step.	Small, 53.0	53.0
stepResults	<a href="#">Simulation Variable Output[]</a>	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: <ul style="list-style-type: none"> <li>• Boolean</li> <li>• Currency</li> <li>• Date</li> <li>• Number</li> <li>• Percent</li> <li>• Text</li> </ul>	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

Property Name	Type	Description	Filter Group and Version	Available Version
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/01Ix0000000000zEAA
```

### 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/01IR000000000u0MAA/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	<a href="#">Decision Matrix Column Input[]</a>	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/01IR000000000u0MAA  
/versions/01NR000000000rFMAQ/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 ( <code>true</code> ) or fetching the rows in JSON	Optional	53.0

Parameter Name	Type	Description	Required or Optional	Available Version
		format ( <code>false</code> ). The default value is <code>false</code> .		

**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 <a href="#">Content Document Version</a> that contains the rows details to be added or updated in a decision matrix version.	Optional  <b>Note:</b> This field is required if you're using a CVS file to add or update rows.	53.0
rows	<a href="#">Decision Matrix Row Input</a> []	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" : "01JR0000000014bMAA"
  } ]
}
```

Update a column:

```
{
  "columns" : [ {
    "id" : "01JR0000000014hMAA",
    "action" : "update",
    "columnType" : "Input",
    "name" : "First Name"
  } ]
}
```

Properties


Name	Type	Description	Required or Optional	Available Version
columns	<a href="#">Decision Matrix Column Input[]</a>	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: <ul style="list-style-type: none"><li>delete</li><li>update</li></ul>	Required	53.0
apiName	String	The API name of a column.	Optional	53.0

 **Note:** Leave this field blank if you're adding a column in a decision matrix.

Name	Type	Description	Required or Optional	Available Version
columnType	String	The type of a column. Possible values are: <ul style="list-style-type: none"> <li>• Input</li> <li>• Output</li> </ul>	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	53.0
			 <b>Note:</b> Leave this field blank if you're adding a column in a decision matrix.	
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 <a href="#">Content Document Version</a> that contains the rows details to be added or updated in a decision matrix version.	Optional <div> <b>Note:</b> This field is required if you're using a CVS file to add or update rows.</div>	53.0
rows	<a href="#">Decision Matrix Row Input[]</a>	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: <ul style="list-style-type: none"><li>• delete</li><li>• update</li></ul>	Required  <b>Note:</b> 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  <b>Note:</b> 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" : "01Ix0000000001TEAQ",
    "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" : "01Ix0000000000zEAA",
  "inputVariables" : [ {
    "dataType" : "Number",
    "id" : "01Jx0000000000zEAA",
    "name" : "IN1"
  }, {
    "dataType" : "Text",
    "id" : "01Jx00000000010EAA",
    "name" : "IN2"
  }, {
    "dataType" : "Text",
    "id" : "01Jx00000000011EAA",
    "name" : "IN3"
  }, {
    "dataType" : "Text",
    "id" : "01Jx00000000012EAA",

```

```

        "name" : "IN4"
    } ],
    "isSuccess" : true,
    "message" : "",
    "name" : "DescisionMatrix2",
    "outputVariables" : [ {
        "dataType" : "Text",
        "id" : "01Jx00000000013EAA",
        "name" : "OUT1"
    }, {
        "dataType" : "Text",
        "id" : "01Jx00000000014EAA",
        "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	<a href="#">Decision Matrix Variable[]</a>	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	<a href="#">Decision Matrix Variable[]</a>	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" : "01Ix0000000001TEAQ",
        "name" : "Decision_Matrix_Test1"
    }, {
        "id" : "01Ix000000000pEAA",
        "name" : "Decision_Matrix_Test2"
    }, {
        "id" : "01Ix0000000001OEAQ",
        "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	<a href="#">Decision Matrix Basic[]</a>	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" : "01Jx00000000010EAA",
  "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	<a href="#">Decision Matrix Column Output[]</a>	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
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	<a href="#">Decision Matrix Row Output[]</a>	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

# Outcome Management Developer Guide

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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.

## [Outcome Management Data Model](#)

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

## [Outcome Management Standard Objects](#)

The Outcome Management data model provides objects and fields to define, measure, and evaluate an organization's outcome strategy.

## 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.

SEE ALSO:

[Salesforce Help: Outcome Management](#)

### EDITIONS

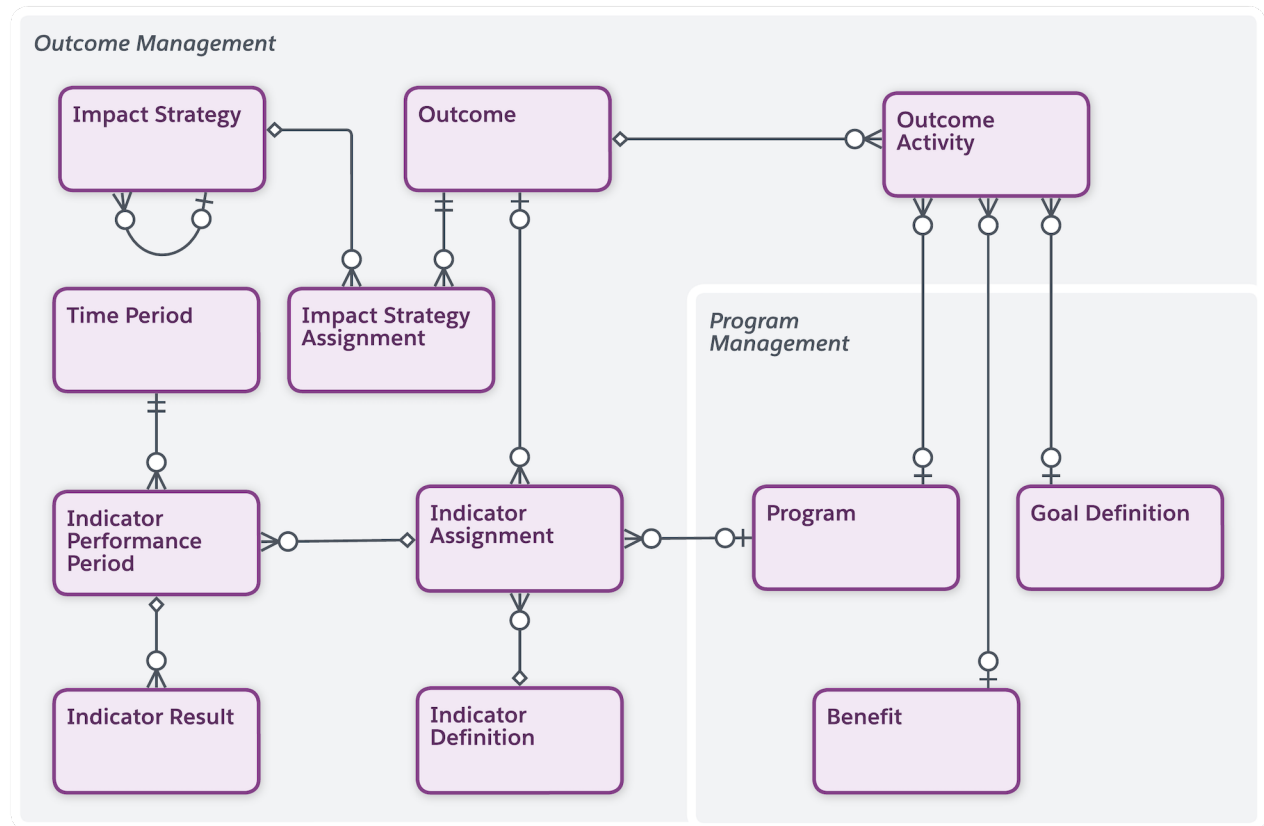
Available in: Lightning Experience. [View product and edition availability.](#)

## 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	<b>Type</b> textarea
	<b>Properties</b> Create, Nillable, Update
	<b>Description</b> The description about the impact strategy.

Field	Details
LastReferencedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> Date and time when a user last referenced this impact strategy.</p>
LastViewedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> Date and time when a user last viewed this impact strategy.</p>
Level	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Specifies the level or scope of the impact strategy.  Possible values are:</p> <ul style="list-style-type: none"> <li>• Department</li> <li>• Organizational</li> <li>• Program</li> </ul>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, idLookup, Sort, Update</p> <p><b>Description</b> The name of the impact strategy.</p>
OwnerId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> The ID of the user who owns the impact strategy.  This field is a polymorphic relationship field.</p> <p><b>Relationship Name</b> Owner</p>

Field	Details
	<b>Relationship Type</b> Lookup <b>Refers To</b> Group, User
ParentImpactStrategyId	<b>Type</b> reference <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> The associated parent impact strategy. This field is a relationship field. <b>Relationship Name</b> ParentImpactStrategy <b>Relationship Type</b> Lookup <b>Refers To</b> ImpactStrategy
Status	<b>Type</b> picklist <b>Properties</b> Create, Filter, Group, Sort, Update <b>Description</b> Specifies the status of the impact strategy. Possible values are: <ul style="list-style-type: none"> <li>• Active</li> <li>• Canceled</li> <li>• Completed</li> <li>• Planned</li> </ul>
Type	<b>Type</b> picklist <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> Specifies the type of the impact strategy. Possible values are: <ul style="list-style-type: none"> <li>• External Requirement</li> <li>• Logic Model</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>• Strategic Plan</li> <li>• Theory of Change</li> </ul>

## Associated Objects

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

### 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	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> The impact strategy associated with this impact strategy assignment.</p>

Field	Details
	<p>This field is a relationship field.</p> <p><b>Relationship Name</b> ImpactStrategy</p> <p><b>Relationship Type</b> Master-Detail</p> <p><b>Refers To</b> ImpactStrategy</p>
LastReferencedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> Date and time when a user last referenced this impact strategy assignment.</p>
LastViewedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> Date and time when a user last viewed this impact strategy assignment.</p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p><b>Description</b> The unique number of the impact strategy assignment.</p>
OutcomeId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The outcome associated with this impact strategy assignment. This field is a relationship field.</p> <p><b>Relationship Name</b> Outcome</p> <p><b>Relationship Type</b> Lookup</p>

Field	Details
	<b>Refers To</b> 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	<b>Type</b> picklist  <b>Properties</b> Create, Filter, Group, Sort, Update  <b>Description</b> Specifies the object that the indicator assignment measures. Possible values are: <ul style="list-style-type: none"> <li>• Outcome</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>Program</li> </ul>
IndicatorDefinitionId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> The indicator definition that's associated with the indicator assignment. This field is a relationship field.</p> <p><b>Relationship Name</b> IndicatorDefinition</p> <p><b>Relationship Type</b> Master-Detail</p> <p><b>Refers To</b> IndicatorDefinition</p>
IntendedDirection	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> Specifies the intended direction of change in the behavior, knowledge, skills, status, or level of functioning that's detailed in the parent indicator definition. Possible values are:</p> <ul style="list-style-type: none"> <li>Decrease</li> <li>Increase</li> <li>Maintain</li> </ul>
LastReferencedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p>

Field	Details
	<b>Description</b> The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.
Name	<b>Type</b> string <b>Properties</b> Create, Filter, Group, idLookup, Sort, Update <b>Description</b> The name of the indicator assignment.
OutcomeId	<b>Type</b> reference <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> The outcome that the indicator assignment measures. This field is a relationship field. <b>Relationship Name</b> Outcome <b>Relationship Type</b> Lookup <b>Refers To</b> Outcome
OwnerId	<b>Type</b> reference <b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update <b>Description</b> The owner of this indicator assignment. This field is a polymorphic relationship field. <b>Relationship Name</b> Owner <b>Relationship Type</b> Lookup <b>Refers To</b> Group, User
ProgramId	<b>Type</b> reference

Field	Details
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> The program that the indicator assignment measures. This field is a relationship field. <b>Relationship Name</b> Program <b>Relationship Type</b> Lookup <b>Refers To</b> Program
Status	<b>Type</b> picklist <b>Properties</b> Create, Filter, Group, Sort, Update <b>Description</b> Specifies the status of the indicator assignment. Possible values are: <ul style="list-style-type: none"> <li>• Active</li> <li>• Canceled</li> <li>• Completed</li> <li>• Planned</li> </ul>

## Associated Objects

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

### [IndicatorAssignmentFeed](#)

Feed tracking is available for the object.

### [IndicatorAssignmentHistory](#)

History is available for tracked fields of the object.

### [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

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## Fields

Field	Details
Description	<p><b>Type</b> textarea</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The description of the indicator definition.</p>
FlowDefinitionApiName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The API name of the flow definition associated with the indicator definition. This field is available from API version 60.0 and later.</p>
LastReferencedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> Date and time when a user last referenced this indicator definition.</p>
LastViewedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> Date and time when a user last viewed this indicator definition.</p>

Field	Details
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, idLookup, Sort, Update</p> <p><b>Description</b> The name of the indicator definition.</p>
OwnerId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> The ID of the user who owns the outcome. This field is a polymorphic relationship field.</p> <p><b>Relationship Name</b> Owner</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> Group, User</p>
Status	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> Specifies the status of the indicator definition. Possible values are:</p> <ul style="list-style-type: none"> <li>• Active</li> <li>• Canceled</li> <li>• Completed</li> <li>• Planned</li> </ul>
UnitOfMeasureId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The unit of measure for the target, baseline, and result values that are associated with this indicator definition.</p>

Field	Details
	This field is a relationship field.
	<b>Relationship Name</b> UnitOfMeasure
	<b>Relationship Type</b> Lookup
	<b>Refers To</b> 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	<p><b>Type</b> textarea</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The description of the baseline value.</p>
BaselineValue	<p><b>Type</b> double</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The value of the indicator assignment at the beginning of the indicator performance period.</p>
Description	<p><b>Type</b> textarea</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The description of the indicator performance period.</p>
IndicatorAssignmentId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> The indicator assignment that's associated with the indicator performance period. This field is a relationship field.</p> <p><b>Relationship Name</b> IndicatorAssignment</p> <p><b>Relationship Type</b> Master-Detail</p> <p><b>Refers To</b> IndicatorAssignment</p>
LastReferencedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p>

Field	Details
	<b>Description</b> The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastResultMeasurementDate	<b>Type</b> date  <b>Properties</b> Filter, Group, Nillable, Sort  <b>Description</b> The date when the last result value was measured.  This field is a calculated field.
LastResultValue	<b>Type</b> double  <b>Properties</b> Filter, Nillable, Sort  <b>Description</b> The result value from the most recently measured indicator result.  This field is a calculated field.
LastViewedDate	<b>Type</b> dateTime  <b>Properties</b> Filter, Nillable, Sort  <b>Description</b> The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate is not null, the user accessed this record or list view.
Name	<b>Type</b> string  <b>Properties</b> Create, Filter, Group, idLookup, Sort, Update  <b>Description</b> The name of the indicator performance period.
TargetProgress	<b>Type</b> picklist  <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update  <b>Description</b> Specifies the progress of the target within the time period.

Field	Details
	<p>Possible values are:</p> <ul style="list-style-type: none"> <li>• At Risk</li> <li>• Complete</li> <li>• Not Met</li> <li>• Not Started</li> <li>• On Track</li> </ul>
TargetValue	<p><b>Type</b> double</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The target value of the indicator assignment within the time period.</p>
TimePeriodId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The time period that is associated with the indicator performance period. This field is a relationship field.</p> <p><b>Relationship Name</b> TimePeriod</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> TimePeriod</p>

## Associated Objects

This object has the following associated objects. If the API version isn'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	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> Determines whether the indicator result was added manually or calculated by automation. This field is available from API version 60.0 and later.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>AutomaticallyCalculated</code></li> <li>• <code>Manual</code></li> </ul>
Denominator	<p><b>Type</b> double</p> <p><b>Properties</b> Create, Filter, Nillable, Sort</p> <p><b>Description</b> The denominator in automatically-calculated results that are an average or percent. This field is available from API version 60.0 and later.</p>
Description	<p><b>Type</b> textarea</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The description of the indicator result.</p>

Field	Details
FlowDefinitionApiName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort</p> <p><b>Description</b> The API name of the flow definition associated with this indicator result. This field is available from API version 60.0 and later.</p>
FlowVersion	<p><b>Type</b> int</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort</p> <p><b>Description</b> The version of the flow that calculated this result. This field is available from API version 60.0 and later.</p>
IndicatorPerformancePeriodId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> The indicator performance period for which the result is defined.  This field is a relationship field.</p> <p><b>Relationship Name</b> IndicatorPerformancePeriod</p> <p><b>Relationship Type</b> Master-Detail</p> <p><b>Refers To</b> IndicatorPerformancePeriod</p>
LastReferencedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> Date and time when a user last referenced this indicator result.</p>
LastViewedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p>

Field	Details
	<b>Description</b> Date and time when a user last viewed this indicator result.
MeasurementDate	<b>Type</b> date <b>Properties</b> Create, Filter, Group, Sort, Update <b>Description</b> The date on which the indicator result is measured.
Name	<b>Type</b> string <b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort <b>Description</b> The name of the indicator result.
Numerator	<b>Type</b> double <b>Properties</b> Create, Filter, Nillable, Sort <b>Description</b> The numerator in automatically-calculated results that are an average or percent. This field is available from API version 60.0 and later.
ResultValue	<b>Type</b> double <b>Properties</b> Create, Filter, Sort, Update <b>Description</b> The result for the indicator performance period.
Type	<b>Type</b> picklist <b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update <b>Description</b> Specifies the type of the result for the time period. Possible values are: <ul style="list-style-type: none"> <li>Final</li> <li>Interim</li> </ul>

## Associated Objects

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

### 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	<b>Type</b> textarea <b>Properties</b> Create, Filter, Nillable, Sort, Update <b>Description</b> The description of the outcome.
IntendedDirection	<b>Type</b> picklist <b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update <b>Description</b> Specifies the intended direction of change in the behavior, knowledge, skills, status, or level of functioning that's detailed in the outcome.  Possible values are: <ul style="list-style-type: none"> <li>Decrease</li> <li>Increase</li> <li>Maintain</li> </ul>

Field	Details
LastReferencedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> Date and time when a user last referenced this outcome.</p>
LastViewedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> Date and time when a user last viewed this outcome.</p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, idLookup, Sort, Update</p> <p><b>Description</b> The name of the outcome.</p>
OwnerId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> The ID of the user who owns the outcome. This field is a polymorphic relationship field.</p> <p><b>Relationship Name</b> Owner</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> Group, User</p>
SourceName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<b>Description</b> The name of the source that initially defined the outcome. For example, United Nations Sustainable Development Goals (UNSDG).
Status	<b>Type</b> picklist <b>Properties</b> Create, Filter, Group, Sort, Update <b>Description</b> Specifies the status of the outcome. Possible values are: <ul style="list-style-type: none"> <li>• Active</li> <li>• Canceled</li> <li>• Completed</li> <li>• Planned</li> </ul>
Term	<b>Type</b> picklist <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> Specifies the term for which the outcome is defined. Possible values are: <ul style="list-style-type: none"> <li>• Long-Term</li> <li>• Medium-Term</li> <li>• Short-Term</li> </ul>

## Associated Objects

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

### 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	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The benefit that's associated with the outcome. This field is a relationship field.</p> <p><b>Relationship Name</b> Benefit</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> Benefit</p>
GoalDefinitionId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The goal definition that's associated with the outcome. This field is available from API version 60.0 and later. This field is a relationship field.</p> <p><b>Relationship Name</b> GoalDefinition</p>

Field	Details
	<b>Relationship Type</b> Lookup <b>Refers To</b> GoalDefinition
LastReferencedDate	<b>Type</b> dateTime <b>Properties</b> Filter, Nillable, Sort <b>Description</b> Date and time when a user last referenced this outcome activity.
LastViewedDate	<b>Type</b> dateTime <b>Properties</b> Filter, Nillable, Sort <b>Description</b> Date and time when a user last viewed this outcome activity.
Name	<b>Type</b> string <b>Properties</b> Create, Filter, Group, idLookup, Sort, Update <b>Description</b> The name of the outcome activity.
OutcomeActivityType	<b>Type</b> picklist <b>Properties</b> Create, Filter, Group, Sort, Update <b>Description</b> The type of activity that's associated with the outcome, such as program, benefit. Possible values are: <ul style="list-style-type: none"> <li>Benefit</li> <li>Goal Definition This value is available from API version 60.0 and later.</li> <li>Program</li> </ul>
OutcomeId	<b>Type</b> reference <b>Properties</b> Create, Filter, Group, Sort

Field	Details
	<p><b>Description</b></p> <p>The outcome that's associated with the outcome activity.</p> <p>This field is a relationship field.</p> <p><b>Relationship Name</b></p> <p>Outcome</p> <p><b>Relationship Type</b></p> <p>Master-Detail</p> <p><b>Refers To</b></p> <p>Outcome</p>
OwnerId	<p><b>Type</b></p> <p>reference</p> <p><b>Properties</b></p> <p>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b></p> <p>The owner of the record.</p> <p>This field is a polymorphic relationship field.</p> <p>This field is available from API version 63.0 and later.</p> <p><b>Relationship Name</b></p> <p>Owner</p> <p><b>Refers To</b></p> <p>Group, User</p>
ProgramId	<p><b>Type</b></p> <p>reference</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b></p> <p>The program that's associated with the outcome.</p> <p>This field is a relationship field.</p> <p><b>Relationship Name</b></p> <p>Program</p> <p><b>Relationship Type</b></p> <p>Lookup</p> <p><b>Refers To</b></p> <p>Program</p>

## Associated Objects

This object has the following associated objects. If the API version isn'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	<b>Type</b> dateTime  <b>Properties</b> Create, Filter, Sort, Update  <b>Description</b> The end date and time of the time period.
LastReferencedDate	<b>Type</b> dateTime  <b>Properties</b> Filter, Nillable, Sort

Field	Details
	<b>Description</b> Date and time when a user last referenced this time period.
LastViewedDate	<b>Type</b> dateTime <b>Properties</b> Filter, Nillable, Sort <b>Description</b> Date and time when a user last viewed this time period.
Name	<b>Type</b> string <b>Properties</b> Create, Filter, Group, idLookup, Sort, Update <b>Description</b> The name of the time period.
OwnerId	<b>Type</b> reference <b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update <b>Description</b> The ID of the user who owns the time period. This field is a polymorphic relationship field. <b>Relationship Name</b> Owner <b>Relationship Type</b> Lookup <b>Refers To</b> Group, User
StartDate	<b>Type</b> dateTime <b>Properties</b> Create, Filter, Sort, Update <b>Description</b> 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	<b>Type</b> string  <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update  <b>Description</b> The description of this unit of measure.
LastReferencedDate	<b>Type</b> dateTime  <b>Properties</b> Filter, Nillable, Sort  <b>Description</b> The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	<b>Type</b> dateTime  <b>Properties</b> Filter, Nillable, Sort

Field	Details
	<b>Description</b> The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
Name	<b>Type</b> string <b>Properties</b> Create, Filter, Group, idLookup, Sort, Update <b>Description</b> The name of this unit of measure.
OwnerId	<b>Type</b> reference <b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update <b>Description</b> The ID of the user who owns this record.
Type	<b>Type</b> picklist <b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update <b>Description</b> The type of the unit of measure. For example, weight, distance, period.
UnitCode	<b>Type</b> string <b>Properties</b> Create, Filter, Group, Sort, Update <b>Description</b> The code for this unit of measure. For example, mm[Hg], mcg/mL, kgs, lbs.

## Associated Objects

This object has the following associated objects. If the API version isn'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.

## Outreach List

---

Help your sales or service agents get the most out of their prospect engagements with Outreach List in the split view. Agents can effortlessly and efficiently cross-sell products, collect outstanding dues, and provide advisory services to prospects, including existing customers.

### Outreach List Connect APIs

Use the Outreach List Connect APIs to get actionable lists and the associated metadata.

SEE ALSO:

[Outreach List](#)

## Outreach List Connect APIs

Use the Outreach List Connect APIs to get actionable lists and the associated metadata.

### Outreach List API Resources

Here's the list of the Outreach List API resources.

### Outreach List API Responses

Here's the list of the Outreach List API response bodies.

## Outreach List API Resources

Here's the list of the Outreach List API resources.

### Actionable Lists Assigned to an Agent (GET)

Retrieve the actionable lists that are assigned to the querying agent.

### Actionable List Metadata (GET)

Retrieve the actionable list member statuses, the count of actionable list members in each status, and the quick action metadata for a specified actionable list ID.

## Actionable Lists Assigned to an Agent (GET)

Retrieve the actionable lists that are assigned to the querying agent.

### Resource

```
/connect/sales-excellence/actionable-lists
```

### Resource Example

```
https://yourInstance.salesforce.com/services/data/v63.0/connect/sales-excellence/actionable-lists
```

Available version

58.0

Requires Chatter

No

HTTP methods

GET

Response body for GET

[Assigned Actionable Lists](#)

Actionable List Metadata (GET)

Retrieve the actionable list member statuses, the count of actionable list members in each status, and the quick action metadata for a specified actionable list ID.

Resource

```
/connect/sales-excellence/actionable-lists/metadata/${actionableListId}
```

Resource Example

```
https://your-instance.salesforce.com/services/data/v63.0/connect/sales-excellence/actionable-lists/metadata/0c910000000000000000000000000000?hasMemberStatus=true&hasQuickActions=true
```

Available version

58.0

Requires Chatter

No

HTTP methods

GET

Request parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
hasMemberStatus	Boolean	Indicates whether to include ( <code>true</code> ) actionable list member statuses and the count of actionable list members in each status in the response or not ( <code>false</code> ). Default value is <code>true</code> .	Optional	58.0
hasQuickActions	Boolean	Indicates whether to include ( <code>true</code> ) information about quick actions fields of the configured object in the response or not ( <code>false</code> ). Default value is <code>true</code> .	Optional	58.0
searchTerm	String	Object record's name that is configured in the actionable list for retrieving the actionable list member count for each status.	Optional	58.0

Response body for GET  
[Actionable List Metadata](#)

Outreach List API Responses

Here’s the list of the Outreach List API response bodies.

- [Assigned Actionable List](#)  
Output representation of the assigned actionable list request.
- [Assigned Actionable Lists](#)  
Output representation of the assigned actionable lists request.
- [Actionable List Member Status](#)  
Output representation of the actionable list member status request.
- [Actionable List Metadata](#)  
Output representation of the actionable list metadata request.
- [Metadata Detail](#)  
Output representation of the metadata detail request.
- [Quick Actions Metadata](#)  
Output representation of the quick actions metadata request.

Assigned Actionable List

Output representation of the assigned actionable list request.

JSON Example

```
{
  "id": "0woSG00000000knYAA",
  "memberSortBy": "ReferenceRecord.Industry",
  "memberSortOrder": "Ascending",
  "name": "Sales List",
  "objectName": "Account",
  "priority": "High"
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
id	String	ID of the actionable list.	Small, 58.0	58.0
memberSortBy	String	Actionable list field that is used to sort the actionable list members in Outreach List.	Small, 58.0	58.0
memberSortOrder	String	Order that is used to sort the actionable list members in Outreach List.  Possible values are: <ul style="list-style-type: none"><li>Ascending</li><li>Descending</li></ul>	Small, 58.0	58.0

Property Name	Type	Description	Filter Group and Version	Available Version
name	String	Name of an actionable list.	Small, 58.0	58.0
objectName	String	Name of the object configured in an actionable list, such as Account, Contact, or Lead.	Small, 58.0	58.0
priority	String	Priority of an actionable list.  Possible values are: <ul style="list-style-type: none"> <li>• High</li> <li>• Medium</li> <li>• Low</li> </ul>	Small, 58.0	58.0

## Assigned Actionable Lists

Output representation of the assigned actionable lists request.

### JSON Example

```
{
  "actionableLists": [
    {
      "id": "0woSG00000000knYAA",
      "memberSortBy": "ReferenceRecord.Industry",
      "memberSortOrder": "Ascending",
      "name": "Sales List",
      "objectName": "Account",
      "priority": "High"
    },
    {
      "id": "0woSG00000000mPYAQ",
      "memberSortBy": "ReferenceRecord.Industry",
      "memberSortOrder": "Ascending",
      "name": "Patient List",
      "objectName": "Account",
      "priority": "High"
    },
    {
      "id": "0woSG00000000zJYAQ",
      "memberSortBy": "ReferenceRecord.BillingCity",
      "memberSortOrder": "Ascending",
      "name": "Target List",
      "objectName": "Account",
      "priority": "High"
    }
  ]
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
actionableLists	<a href="#">Assigned Actionable List[]</a>	List of actionable lists assigned to an agent.	Small, 58.0	58.0

## Actionable List Member Status

Output representation of the actionable list member status request.

### JSON Example

```
"statusCountList": [
  {
    "count": 0,
    "iconName": "action:approval",
    "id": "0x5SG00000000XtYAI",
    "status": "Closed"
  },
  {
    "count": 0,
    "iconName": "action:preview",
    "id": "0x5SG00000000XuYAI",
    "status": "Triage"
  },
  {
    "count": 3,
    "iconName": "action:call",
    "id": "0x5SG00000000XvYAI",
    "status": "Call"
  },
  {
    "count": 0,
    "iconName": "action:new_event",
    "id": "0x5SG00000000XwYAI",
    "status": "Follow up"
  },
  {
    "count": 64,
    "iconName": "action:fallback",
    "id": "0x5SG00000000XxYAI",
    "status": "Lead"
  },
  {
    "count": 1,
    "iconName": null,
    "id": null,
    "status": null
  }
]
```

Property Name	Type	Description	Filter Group and Version	Available Version
count	Integer	Count of actionable list members in an actionable list member status.	Small, 58.0	58.0
iconName	String	Name of an actionable list member status icon.	Small, 58.0	58.0
id	String	ID of an actionable list member status.	Small, 58.0	58.0
status	String	Name of an actionable list member status.	Small, 58.0	58.0

## Actionable List Metadata

Output representation of the actionable list metadata request.

### JSON Example

```
{
  "quickActionList": [
    {
      "metadataDetailRepresentation": [
        {
          "column": "Phone",
          "label": "Account Phone"
        },
        {
          "column": "Home_Phone",
          "label": "Home Phone"
        }
      ],
      "quickActionType": "Phone"
    }
  ],
  "statusCountList": [
    {
      "count": 0,
      "iconName": "action:approval",
      "id": "0x5SG00000000XtYAI",
      "status": "Closed"
    },
    {
      "count": 0,
      "iconName": "action:preview",
      "id": "0x5SG00000000XuYAI",
      "status": "Triage"
    },
    {
      "count": 3,
      "iconName": "action:call",
      "id": "0x5SG00000000XvYAI",
      "status": "Call"
    }
  ]
}
```

```

    "count": 0,
    "iconName": "action:new_event",
    "id": "0x5SG00000000XwYAI",
    "status": "Follow up"
  },
  {
    "count": 64,
    "iconName": "action:fallback",
    "id": "0x5SG00000000XwYAI",
    "status": "Lead"
  },
  {
    "count": 1,
    "iconName": null,
    "id": null,
    "status": null
  }
]
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
quickActionList	<a href="#">Quick Actions Metadata[]</a>	List of quick actions with their metadata.	Small, 58.0	58.0
statusCountList	<a href="#">Actionable List Member Status[]</a>	List of actionable list member statuses and count of actionable list members in each status for the actionable list ID specified in the request.	Small, 58.0	58.0

## Metadata Detail

Output representation of the metadata detail request.

### JSON Example

```

"metadataDetailRepresentation": [
  {
    "column": "Phone",
    "label": "Account Phone"
  }
  {
    "column": "Home_Phone",
    "label": "Home Phone"
  }
]

```

Property Name	Type	Description	Filter Group and Version	Available Version
column	String	Developer name or API name of the configured object's column on which a quick action is performed.	Small, 58.0	58.0
label	String	Label name of the configured object's column on which a quick action is performed.	Small, 58.0	58.0

## Quick Actions Metadata

Output representation of the quick actions metadata request.

### JSON Example

```
"quickActionList": [
  {
    "metadataDetailRepresentation": [
      {
        "column": "Phone",
        "label": "Account Phone"
      },
      {
        "column": "Home_Phone",
        "label": "Home Phone"
      }
    ],
    "quickActionType": "Phone"
  }
]
```

Property Name	Type	Description	Filter Group and Version	Available Version
metadataDetailRepresentation	<a href="#">Metadata Detail[]</a>	List of metadata details for each quick action.	Small, 58.0	58.0
quickActionType	String	Type of quick action. Possible value is: <ul style="list-style-type: none"> <li>Phone</li> </ul>	Small, 58.0	58.0

## Record Alerts

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.

[Apex Reference](#)

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

[Record Alerts APIs](#)

Use the Record Alerts Business APIs to give users a seamless API experience for Record Alerts.

[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](#).

[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](#).

## 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	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> A unique name of a record alert expression set definition</p>
ExpressionSetDefinitionId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The expression set definition that's associated with the data source of a record alert. This field is a relationship field.</p> <p><b>Relationship Name</b> ExpressionSetDefinition</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> ExpressionSetDefinition</p>
ExpressionSetObject	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> Specifies the name of the object that's related to the expression set. Possible values are:</p> <ul style="list-style-type: none"> <li>Account</li> <li>AccountBrand—Account Brand</li> <li>AccountParticipant—Account Participant</li> <li>ActionPlan—Action Plan</li> <li>Activity</li> <li>Address</li> <li>AppFormProductParticipant—Application Form Product Participant</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>• Applicant</li> <li>• ApplicationActionItem—Application Action Item</li> <li>• ApplicationForm—Application Form</li> <li>• ApplicationFormEvaluation—Application Form Evaluation</li> <li>• ApplicationFormParticipant—Application Form Participant</li> <li>• ApplicationFormProduct—Application Form Product</li> <li>• ApplicationFormProductDev—Application Form Product Deviation</li> <li>• ApplicationFormProductFee—Application Form Product Fee</li> <li>• ApplicationFormProductProposal—Application Form Product Proposal</li> <li>• Asset</li> <li>• AssetRelationship—Asset Relationship</li> <li>• AssociatedLocation—Associated Location</li> <li>• AsyncOperationTracker—Async Operation Tracker</li> <li>• AttributeAdjustmentCondition—Attribute Adjustment Condition</li> <li>• AttributeBasedAdjRule—Attribute Based Adjustment Rule</li> <li>• AttributeBasedAdjustment—Attribute Based Adjustment</li> <li>• AttributeCategory—Attribute Category</li> <li>• AttributeCategoryAttribute—Attribute Category Attribute</li> <li>• AttributeDefinition—Attribute Definition</li> <li>• AttributePicklist—Attribute Picklist</li> <li>• AttributePicklistValue—Attribute Picklist Value</li> <li>• AuthFormRequestRecord—Authorizable Form Request Record</li> <li>• AuthorizationForm—Authorization Form</li> <li>• AuthorizationFormConsent—Authorization Form Consent</li> <li>• AuthorizationFormDataUse—Authorization Form Data Use</li> <li>• AuthorizationFormText—Authorization Form Text</li> <li>• AuthorizedInsuranceLine—Authorized Insurance Line</li> <li>• Award</li> <li>• Banker</li> <li>• BranchUnit—Branch Unit</li> <li>• BranchUnitBusinessMember—Branch Unit Business Member</li> <li>• BranchUnitCustomer—Branch Unit Customer</li> <li>• BranchUnitRelatedRecord—Branch Unit Related Record</li> <li>• BundleBasedAdjustment—Bundle Based Adjustment</li> <li>• BusinessBrand—Business Brand</li> <li>• BusinessLicense—Business License</li> <li>• BusinessMilestone—Business Milestone</li> <li>• BusinessProfile—Business Profile</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>• CalcMatrixColumnRange—Decision Matrix Column Range</li> <li>• CalcProcStepRelationship—Expression Set Step Relationship</li> <li>• CalculationMatrix—Decision Matrix</li> <li>• CalculationMatrixColumn—Decision Matrix Column</li> <li>• CalculationMatrixRow—Decision Matrix Row</li> <li>• CalculationMatrixVersion—Decision Matrix Version</li> <li>• CalculationProcedure—Calculation Procedure</li> <li>• CalculationProcedureStep—Calculation Procedure Step</li> <li>• CalculationProcedureVariable—Calculation Procedure Variable</li> <li>• CalculationProcedureVersion—Calculation Procedure Version</li> <li>• Case</li> <li>• CaseParticipant—Case Participant</li> <li>• Claim</li> <li>• ClaimCoverage—Claim Coverage</li> <li>• ClaimItem—Claim Item</li> <li>• ClaimParticipant—Claim Participant</li> <li>• ClaimPaymentSummary—Claim Payment Summary</li> <li>• ClaimTeamMember—Claim Team Member</li> <li>• CodeSet—Code Set</li> <li>• CodeSetBundle—Code Set Bundle</li> <li>• CommSubscription—Communication Subscription</li> <li>• CommSubscriptionChannelType—Communication Subscription Channel Type</li> <li>• CommSubscriptionConsent—Communication Subscription Consent</li> <li>• CommSubscriptionTiming—Communication Subscription Timing</li> <li>• ComplianceControl—Compliance Control</li> <li>• ComplianceProcedure—Compliance Procedure</li> <li>• ComplianceProcedureVersion—Compliance Procedure Version</li> <li>• Contact</li> <li>• ContactPointAddress—Contact Point Address</li> <li>• ContactPointConsent—Contact Point Consent</li> <li>• ContactPointEmail—Contact Point Email</li> <li>• ContactPointPhone—Contact Point Phone</li> <li>• ContactPointTypeConsent—Contact Point Type Consent</li> <li>• ContactRequest—Contact Request</li> <li>• ContentVersion—Content Version</li> <li>• Contract</li> <li>• CustomObjectParticipant—Participant</li> <li>• Customer</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>• CustomerProperty—Customer Property</li> <li>• DataUseLegalBasis—Data Use Legal Basis</li> <li>• DataUsePurpose—Data Use Purpose</li> <li>• DelegatedAccount—External Managed Account</li> <li>• Deviation</li> <li>• DistributorAuthorization—Distributor Authorization</li> <li>• DocChkItemValidatedTarget—Document Checklist Item Validated Target</li> <li>• DocumentChecklistItem—Document Checklist Item</li> <li>• DocumentDecisionRequirement—Document Decision Requirement</li> <li>• DuplicateRecordItem—Duplicate Record Item</li> <li>• DuplicateRecordSet—Duplicate Record Set</li> <li>• EmailMessage—Email Message</li> <li>• EngagementChannelType—Engagement Channel Type</li> <li>• Event</li> <li>• ExpressionSet—Expression Set</li> <li>• ExpressionSetVersion—Expression Set Version</li> <li>• FinancialGoal—Financial Goal</li> <li>• FinancialGoalFunding—Financial Goal Funding</li> <li>• FinancialGoalParty—Financial Goal Party</li> <li>• FinancialPlan—Financial Plan</li> <li>• FlowOrchestrationInstRelaObj—Flow Orchestration Instance Related Obj</li> <li>• FlowOrchestrationInstance—Orchestration Run</li> <li>• FlowOrchestrationStageInstance—Orchestration Stage Run</li> <li>• FlowOrchestrationStepInstance—Orchestration Step Run</li> <li>• FlowOrchestrationWorkItem—Orchestration Work Item</li> <li>• ForecastingCustomData—Forecasting Custom Data</li> <li>• ForecastingItem__hd—Forecasting Item (Historical)</li> <li>• Idea</li> <li>• IdentityDocument—Identity Document</li> <li>• Image</li> <li>• IndexRate—Index Rate</li> <li>• Individual</li> <li>• InfoAuthRequestForm—Info Authorization Request Form</li> <li>• InfoAuthorizationRequest—Info Authorization Request</li> <li>• InformationVerification—Information Verification</li> <li>• InsPolicyTransactionDetail—Insurance Policy Transaction Detail</li> <li>• InsurancePolicy—Insurance Policy</li> <li>• InsurancePolicyAsset—Insurance Policy Asset</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>InsurancePolicyCoverage—Insurance Policy Coverage</li> <li>InsurancePolicyParticipant—Insurance Policy Participant</li> <li>InsurancePolicySurcharge—Insurance Policy Surcharge</li> <li>InsurancePolicyTransaction—Insurance Policy Transaction</li> <li>InsuranceProfile—Insurance Profile</li> <li>Lead</li> <li>LegalEntity—Legal Entity</li> <li>LoanApplicant—Loan Applicant</li> <li>LoanApplicantAddress—Loan Applicant Address</li> <li>LoanApplicantAsset—Loan Applicant Asset</li> <li>LoanApplicantDeclaration—Loan Applicant Declaration</li> <li>LoanApplicantEmployment—Loan Applicant Employment</li> <li>LoanApplicantIncome—Loan Applicant Income</li> <li>LoanApplicantLiability—Loan Applicant Liability</li> <li>LoanApplicationAsset—Loan Application Asset</li> <li>LoanApplicationFinancial—Loan Application Financial</li> <li>LoanApplicationLiability—Loan Application Liability</li> <li>LoanApplicationProperty—Loan Application Property</li> <li>LoanApplicationTitleHolder—Loan Application Title Holder</li> <li>Location</li> <li>LocationTrustMeasure—Location Trust Measure</li> <li>MultipartyInfoAuthRequest—Multiparty Information Authorization Request</li> <li>OmniDataPack—Omni DataPack</li> <li>OmniDataTransform—Omni Data Transformation</li> <li>OmniDataTransformItem—Omni Data Transformation Item</li> <li>OmniESignatureTemplate—Omni Electronic Signature Template</li> <li>OmniProcess—Omni Process</li> <li>OmniProcessCompilation—Omni Process Compilation</li> <li>OmniProcessElement—Omni Process Element</li> <li>OmniProcessTransientData—Omni Process Transient Data</li> <li>OmniScriptSavedSession—OmniScript Saved Session</li> <li>OmniUiCard—Omni UI Card</li> <li>Opportunity</li> <li>OpportunityContactRole—Opportunity Contact Role</li> <li>OpportunityLineItem—Opportunity Product</li> <li>Order</li> <li>OrderItem—Order Product</li> <li>PartyConsent—Party Consent</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>• PartyCreditProfile—Party Credit Profile</li> <li>• PartyExpense—Party Expense</li> <li>• PartyFinancialLiability—Party Financial Liability</li> <li>• PartyFinclLiabAddlBrwr—Party Fincl Liability Addl Borrower</li> <li>• PartyIdentityVerification—Party Identity Verification</li> <li>• PartyIdentityVerificationStep—Party Identity Verification Step</li> <li>• PartyIncome—Party Income</li> <li>• PartyProfile—Party Profile</li> <li>• PartyProfileAddress—Party Profile Address</li> <li>• PartyProfileParticipant—Party Profile Participant</li> <li>• PartyProfileRisk—Party Profile Risk</li> <li>• PartyScreeningStep—Party Screening Step</li> <li>• PartyScreeningSummary—Party Screening Summary</li> <li>• PaymentMandate—Payment Mandate</li> <li>• PersonEducation—Person Education</li> <li>• PersonEmployment—Person Employment</li> <li>• PersonLifeEvent—Person Life Event</li> <li>• Pricebook2—Price Book</li> <li>• PricebookEntry—Price Book Entry</li> <li>• ProcessException—Process Exception</li> <li>• Producer</li> <li>• ProducerCommission—Producer Commission</li> <li>• Product2—Product</li> <li>• ProductAttributeDefinition—Product Attribute Definition</li> <li>• ProductCatalog—Catalog</li> <li>• ProductCategory—Category</li> <li>• ProductCategoryDisqual—Product Category Disqualification</li> <li>• ProductCategoryProduct—Product Category Product</li> <li>• ProductCategoryQualification—Product Category Qualification</li> <li>• ProductClassification—Product Classification</li> <li>• ProductClassificationAttr—Product Classification Attribute</li> <li>• ProductComponentGroup—Product Component Group</li> <li>• ProductComponentGrpOverride—Product Component Group Override</li> <li>• ProductDisqualification—Product Disqualification</li> <li>• ProductFee—Product Fee</li> <li>• ProductListRate—Product List Rate</li> <li>• ProductQualification—Product Qualification</li> <li>• ProductRelComponentOverride—Product Related Component Override</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>• ProfileSkill—Skill</li> <li>• ProfileSkillEndorsement—Endorsement</li> <li>• ProfileSkillUser—Skill User</li> <li>• PublicComplaint—Public Complaint</li> <li>• QuickText—Quick Text</li> <li>• RajAppForm__c—RajAppForm</li> <li>• ReceivedDocument—Received Document</li> <li>• ReceivedDocumentType—Received Document Type</li> <li>• Recommendation</li> <li>• RecordAction</li> <li>• RecordAggregationResult—Record Aggregation Result</li> <li>• RecordAlert—Record Alert</li> <li>• ResidentialLoanApplication—Residential Loan Application</li> <li>• RevenueAsyncOperation—Revenue Async Operation</li> <li>• RevenueTransactionErrorLog—Revenue Transaction Error Log</li> <li>• Scorecard</li> <li>• ScorecardAssociation—Scorecard Association</li> <li>• ScorecardMetric—Scorecard Metric</li> <li>• SecuritiesHolding—Securities Holding</li> <li>• Seller</li> <li>• SocialPersona—Social Persona</li> <li>• SocialPost—Social Post</li> <li>• Solution</li> <li>• TagCategory—Tag Category</li> <li>• Task</li> <li>• User</li> <li>• UserProvisioningRequest—User Provisioning Request</li> <li>• WorkBadge—Badge Received</li> <li>• WorkBadgeDefinition—Badge</li> <li>• WorkOrder—Work Order</li> <li>• WorkOrderLineItem—Work Order Line Item</li> <li>• WorkThanks—Thanks</li> <li>• WorkerCompCoverageClass—Worker Compensation Coverage Class</li> <li>• devopsimpkg13__DRBatchQueue__c—Vlocity Omnistudio Data Mapper Batch Queue</li> <li>• devopsimpkg13__DRBulkData__c—Omnistudio Data Mapper Bulk Data</li> <li>• devopsimpkg13__Interface_DRGeneric__c—Vlocity Omnistudio Data Mapper Object Interface</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>• <code>devopsimpkg13__PDFTronEncryptionKey__mdt</code>—PDFTron Encryption Key</li> <li>• <code>devopsimpkg13__TestResult__c</code>—Test Result</li> <li>• <code>devopsimpkg13__VlocityDataPack__c</code>—Vlocity DataPack Object</li> <li>• <code>devopsimpkg13__VlocityDocuSignTemplate__c</code>—Vlocity DocuSign Template</li> <li>• <code>devopsimpkg13__VlocityErrorLogEntry__c</code>—Vlocity Error Log Entry</li> <li>• <code>devopsimpkg13__VlocityScheduledJob__c</code>—Vlocity Scheduled Job</li> <li>• <code>devopsimpkg13__VlocityTrackingEntry__c</code>—Vlocity Tracking Entry</li> </ul>
IsActive	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> Indicates whether the record alert data source is active (true) or not (false).  The default value is <code>false</code>.</p>
Language	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The language of the expression set definition  Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>da</code>—Danish</li> <li>• <code>de</code>—German</li> <li>• <code>en_US</code>—English</li> <li>• <code>es</code>—Spanish</li> <li>• <code>es_MX</code>—Spanish (Mexico)</li> <li>• <code>fi</code>—Finnish</li> <li>• <code>fr</code>—French</li> <li>• <code>it</code>—Italian</li> <li>• <code>ja</code>—Japanese</li> <li>• <code>ko</code>—Korean</li> <li>• <code>nl_NL</code>—Dutch</li> <li>• <code>no</code>—Norwegian</li> <li>• <code>pt_BR</code>—Portuguese (Brazil)</li> <li>• <code>ru</code>—Russian</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>• sv—Swedish</li> <li>• th—Thai</li> <li>• zh_CN—Chinese (Simplified)</li> <li>• zh_TW—Chinese (Traditional)</li> </ul>
MasterLabel	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> A unique name of a record alert data source expression set definition.</p>
NamespacePrefix	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> A namespace prefix associated with this object.</p>
RecordAlertDataSourceId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The data source of the record alert that's associated with an expression set.  This field is a relationship field.</p> <p><b>Relationship Name</b> RecordAlertDataSource</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> RecordAlertDataSource</p>

## 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	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> A detailed description of the alert.</p>
EffectiveDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Create, Filter, Sort, Update</p> <p><b>Description</b> The date and time that the alert was generated or became active.</p>
IsActive	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> Whether the alert is still active (<code>true</code>) or has been dismissed (<code>false</code>).  The default value is <code>false</code>.</p>
LastReferencedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p>

Field	Details
	<b>Description</b> The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
Name	<b>Type</b> string <b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort <b>Description</b> The name of the record alert.
OwnerId	<b>Type</b> reference <b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update <b>Description</b> ID of the user who created the record alert. This is a polymorphic relationship field. <b>Relationship Name</b> Owner <b>Relationship Type</b> Lookup <b>Refers To</b> Group, User
ParentId	<b>Type</b> reference <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> The user, account, or contact associated with the alert. This is a polymorphic relationship field. <b>Relationship Name</b> Parent <b>Relationship Type</b> Lookup <b>Refers To</b> 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,

Field	Details
	<p> FinServ__Education__c, FinServ__Employment__c, FinServ__FinancialAccountRole__c,  FinServ__FinancialAccountTransaction__c, FinServ__FinancialAccount__c,  FinServ__FinancialGoal__c, FinServ__FinancialHolding__c,  FinServ__IdentificationDocument__c, FinServ__IndustriesAppConfig__c,  FinServ__IndustriesSettings__c, FinServ__LifeEvent__c,  FinServ__NextLastInteractionSettings__c, FinServ__PolicyPaymentMethod__c,  FinServ__ReciprocalRole__c, FinServ__Record_Rollup_Configuration__c,  FinServ__Revenue__c, FinServ__RollupByLookupConfig__c,  FinServ__RollupByLookupFilterCriteria__c, FinServ__Securities__c,  FinServ__UsePersonAccount__c, FinServ__WealthAppConfig__c,  FinServ__individualExcludedFields__c, FinancialTransactionDisputeInfo__c, Lead,  LoanApplicant, LoanApplicantEmployment, LoanApplicantIncome, LoanApplicationAsset,  LoanApplicationFinancial, LoanApplicationLiability, LoanApplicationProperty, Opportunity,  ResidentialLoanApplication, ServiceRequest__c, TestCM__c, User, Vehicle__c,  vlocity_lwc27__CardFrameworkConfiguration__c, vlocity_lwc27__DRBatchQueue__c,  vlocity_lwc27__DRBulkData__c, vlocity_lwc27__DREncryption__c,  vlocity_lwc27__DRWorker__c, vlocity_lwc27__Interface_DRGeneric__c,  vlocity_lwc27__TestResult__c, vlocity_lwc27__TriggerSetup__c,  vlocity_lwc27__UISettings__c, vlocity_lwc27__VlocityDataPack__c,  vlocity_lwc27__VlocityDocuSignTemplate__c, vlocity_lwc27__VlocityErrorLogEntry__c,  vlocity_lwc27__VlocityScheduledJob__c, vlocity_lwc27__VlocityTrackingEntry__c </p>
RecordAlertCategoryId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The category for the alert.  This is a relationship field.</p> <p><b>Relationship Name</b> RecordAlertCategory</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> RecordAlertCategory</p>
Severity	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The severity of the alert, which can be pulled from the Record Alert Category or overridden.  Possible Education Cloud values are:</p>

Field	Details
	<ul style="list-style-type: none"> <li>• High</li> <li>• Low</li> <li>• Medium</li> </ul> <p>Possible Financial Service Cloud values are:</p> <ul style="list-style-type: none"> <li>• Error</li> <li>• Info</li> <li>• Minor</li> <li>• Warning</li> </ul>
SnoozeUntilDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The date the alert is delivered.</p>
SourceSystemIdentifier	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The unique identifier for the alert in an external system.</p>
Subject	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> A short description of the alert.</p>
ValidUntilDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Create, Filter, Sort, Update</p> <p><b>Description</b> The date and time when the alert becomes invalid.</p>
WhatId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p>

**Field****Details****Description**

The record that the alert pertains to.

This is a polymorphic relationship field.

**Relationship Name**

What

**Relationship Type**

Lookup

**Refers To**

Account, Asset, BusinessMilestone, Case, Claim, Contact, Contract, DisputeConfig\_\_c, FinServ\_\_AccountAccountRelation\_\_c, FinServ\_\_Alert\_\_c, FinServ\_\_AssetsAndLiabilities\_\_c, FinServ\_\_B2CLeadCompanyNameConfig\_\_c, FinServ\_\_BillingStatement\_\_c, FinServ\_\_Card\_\_c, FinServ\_\_ChargesAndFees\_\_c, FinServ\_\_ContactContactRelation\_\_c, FinServ\_\_Education\_\_c, FinServ\_\_Employment\_\_c, FinServ\_\_FinancialAccountRole\_\_c, FinServ\_\_FinancialAccountTransaction\_\_c, FinServ\_\_FinancialAccount\_\_c, FinServ\_\_FinancialGoal\_\_c, FinServ\_\_FinancialHolding\_\_c, FinServ\_\_IdentificationDocument\_\_c, FinServ\_\_IndustriesAppConfig\_\_c, FinServ\_\_IndustriesSettings\_\_c, FinServ\_\_LifeEvent\_\_c, FinServ\_\_NextLastInteractionSettings\_\_c, FinServ\_\_PolicyPaymentMethod\_\_c, FinServ\_\_ReciprocalRole\_\_c, FinServ\_\_Record\_Rollup\_Configuration\_\_c, FinServ\_\_Revenue\_\_c, FinServ\_\_RollupByLookupConfig\_\_c, FinServ\_\_RollupByLookupFilterCriteria\_\_c, FinServ\_\_Securities\_\_c, FinServ\_\_UsePersonAccount\_\_c, FinServ\_\_WealthAppConfig\_\_c, FinServ\_\_individualExcludedFields\_\_c, FinancialTransactionDisputeInfo\_\_c, InsurancePolicy, InsurancePolicyCoverage, Lead, LoanApplicant, LoanApplicantEmployment, LoanApplicantIncome, LoanApplicationAsset, LoanApplicationFinancial, LoanApplicationLiability, LoanApplicationProperty, Opportunity, PersonLifeEvent, ResidentialLoanApplication, ServiceRequest\_\_c, TestCM\_\_c, Vehicle\_\_c, vlocity\_lwc27\_\_CardFrameworkConfiguration\_\_c, vlocity\_lwc27\_\_DRBatchQueue\_\_c, vlocity\_lwc27\_\_DRBulkData\_\_c, vlocity\_lwc27\_\_DREncryption\_\_c, vlocity\_lwc27\_\_DRWorker\_\_c, vlocity\_lwc27\_\_Interface\_DRGeneric\_\_c, vlocity\_lwc27\_\_TestResult\_\_c, vlocity\_lwc27\_\_TriggerSetup\_\_c, vlocity\_lwc27\_\_UISettings\_\_c, vlocity\_lwc27\_\_VlocityDataPack\_\_c, vlocity\_lwc27\_\_VlocityDocuSignTemplate\_\_c, vlocity\_lwc27\_\_VlocityErrorLogEntry\_\_c, vlocity\_lwc27\_\_VlocityScheduledJob\_\_c, vlocity\_lwc27\_\_VlocityTrackingEntry\_\_c

**Associated Objects**

This object has the following associated objects. If the API version isn'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
<code>LastReferencedDate</code>	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
<code>LastViewedDate</code>	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> isn't null, the user accessed this record or list view indirectly.</p>
<code>Name</code>	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, idLookup, Sort, Update</p> <p><b>Description</b> The name of the record alert actionable target.</p>

Field	Details
RecordAlertId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> The parent record alert associated with the record alert actionable target. This field is a relationship field.</p> <p><b>Relationship Name</b> RecordAlert</p> <p><b>Relationship Type</b> Master-detail</p> <p><b>Refers To</b> RecordAlert (the master object)</p>
TargetObjectName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> 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.</p>
TargetRecordIdentifier	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The ID of the target record that a user is navigated to. Applicable when users specify view in the type field.</p>
Type	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> Specifies the type of the record alert actionable target, such as create or view. Possible values are:</p> <ul style="list-style-type: none"> <li>• Create</li> <li>• View</li> </ul>

## 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	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The description of the RecordAlertCategory.</p>
DeveloperName	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> 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.</p> <p> <b>Note:</b> Only users with View DeveloperName OR View Setup and Configuration permission can view, group, sort, and filter this field.</p>
Language	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Restricted picklist, Sort</p> <p><b>Description</b> The language of the RecordAlertCategory.</p>
MasterLabel	<p><b>Type</b> string</p>

Field	Details
	<b>Properties</b> Filter, Group, idLookup, Sort  <b>Description</b> The user-interface name of the RecordAlertCategory.
NamespacePrefix	<b>Type</b> string  <b>Properties</b> Filter, Group, Nillable, Sort  <b>Description</b> The namespace prefix of the RecordAlertCategory.
Severity	<b>Type</b> picklist  <b>Properties</b> Filter, Group, Nillable, Sort  <b>Description</b> Indicates the degree of impact that an alert in this category can have.  Possible Education Cloud values are: <ul style="list-style-type: none"> <li>• High</li> <li>• Low</li> <li>• Medium</li> </ul> Possible Financial Service Cloud values are: <ul style="list-style-type: none"> <li>• Error</li> <li>• Info</li> <li>• Minor</li> <li>• Warning</li> </ul>

## 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	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Restricted picklist, Sort</p> <p><b>Description</b> The language the RecordAlertCategory label is translated to.</p>
NamespacePrefix	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The namespace prefix of the RecordAlertCategory.</p>
ParentId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> The ID of the RecordAlertCategory. This field is a relationship field.</p> <p><b>Relationship Name</b> Parent</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> RecordAlertCategory</p>
Value	<p><b>Type</b> textarea</p> <p><b>Properties</b> Create, Filter, Sort, Update</p> <p><b>Description</b> The translated label of the RecordAlertCategory.</p>

## 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	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> An Apex class to be used as the data source. This field is a relationship field.</p> <p><b>Relationship Name</b> ApexClass</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> ApexClass</p>
DeveloperName	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> A unique name of a record alert data source.</p>
IsActive	<p><b>Type</b> boolean</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Sort</p> <p><b>Description</b> Indicates whether the record alert data source is active. The default value is <code>false</code>.</p>
Language	<p><b>Type</b> picklist</p>

Field	Details
	<p><b>Properties</b> Filter, Group, Restricted picklist, Sort</p> <p><b>Description</b> The language of the record alert data source. Possible values are:</p> <ul style="list-style-type: none"> <li>• da—Danish</li> <li>• de—German</li> <li>• en_US—English</li> <li>• es—Spanish</li> <li>• es_MX—Spanish (Mexico)</li> <li>• fi—Finnish</li> <li>• fr—French</li> <li>• it—Italian</li> <li>• ja—Japanese</li> <li>• ko—Korean</li> <li>• nl_NL—Dutch</li> <li>• no—Norwegian</li> <li>• pt_BR—Portuguese (Brazil)</li> <li>• ru—Russian</li> <li>• sv—Swedish</li> <li>• th—Thai</li> <li>• zh_CN—Chinese (Simplified)</li> <li>• zh_TW—Chinese (Traditional)</li> </ul>
MasterLabel	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, idLookup, Sort</p> <p><b>Description</b> A unique name of a record alert data source.</p>
NamespacePrefix	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> A namespace prefix associated with this object.</p>
Type	<p><b>Type</b> picklist</p>

Field	Details
	<b>Properties</b> Filter, Group, Restricted picklist, Sort
	<b>Description</b> Specifies the type of active data source that's used to retrieve a record alert.  Possible values are: <ul style="list-style-type: none"> <li>• <code>APEX</code></li> <li>• <code>BusinessRulesEngine</code>—Business Rules Engine</li> </ul>

## 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()`, `describeObjects()`, `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	<b>Type</b> textarea
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> The translated value for the RecordAlert description.
IsOutOfDate	<b>Type</b> boolean
	<b>Properties</b> Defaulted on create, Filter, Group, Sort
	<b>Description</b> Indicates whether the translation is out-of-date ( <code>true</code> ) or current ( <code>false</code> ). A translation is out-of-date if the parent RecordAlert record is updated after the last translation was filed.

Field	Details
Language	<b>Type</b> picklist <b>Properties</b> Create, Filter, Group, Restricted picklist, Sort <b>Description</b> The language for these translated values.
Name	<b>Type</b> string <b>Properties</b> Create, Filter, Group, idLookup, Sort, Update <b>Description</b> The translated value for the RecordAlert record name. This field is required to translate the text in other fields.
ParentId	<b>Type</b> reference <b>Properties</b> Create, Filter, Group, Sort, Update <b>Description</b> 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	<b>Type</b> string

Field	Details
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update  <b>Description</b> A detailed description of the record's rule template.
DeveloperName	<b>Type</b> string  <b>Properties</b> Create, Filter, Group, Sort, Update  <b>Description</b> A unique name of a record alert template.
Language	<b>Type</b> picklist  <b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update  <b>Description</b> The language of the record alert template.  Possible values are: <ul style="list-style-type: none"> <li>• da—Danish</li> <li>• de—German</li> <li>• en_US—English</li> <li>• es—Spanish</li> <li>• es_MX—Spanish (Mexico)</li> <li>• fi—Finnish</li> <li>• fr—French</li> <li>• it—Italian</li> <li>• ja—Japanese</li> <li>• ko—Korean</li> <li>• nl_NL—Dutch</li> <li>• no—Norwegian</li> <li>• pt_BR—Portuguese (Brazil)</li> <li>• ru—Russian</li> <li>• sv—Swedish</li> <li>• th—Thai</li> <li>• zh_CN—Chinese (Simplified)</li> <li>• zh_TW—Chinese (Traditional)</li> </ul>
MasterLabel	<b>Type</b> string

Field	Details
	<b>Properties</b> Create, Filter, Group, idLookup, Sort, Update <b>Description</b> A unique name of a record alert template.
NamespacePrefix	<b>Type</b> string <b>Properties</b> Filter, Group, Nillable, Sort <b>Description</b> A namespace prefix associated with this object.
RecordAlertCategoryId	<b>Type</b> reference <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> The category for the alert. This field is a relationship field. <b>Relationship Name</b> RecordAlertCategory <b>Relationship Type</b> Lookup <b>Refers To</b> RecordAlertCategory
Subject	<b>Type</b> string <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> 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.

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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: <ul style="list-style-type: none"> <li>Dismiss—The record alert notification doesn't appear again.</li> <li>Snooze—The record alert notification reappears after the specified time period.</li> </ul>	Required	54.0
actionParameters	<a href="#">ConnectApi.RecordAlertActionParameterInput</a>	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.   <b>Note:</b> You can specify <code>effectiveDate</code> 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< <a href="#">ConnectApi.RecordAlert</a> >	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	<a href="#">ConnectApi.RecordAlertActionInfoCollection</a>	Represents the details of an action taken on a record alert.	54.0
active	Boolean	Indicates whether a record alert is active ( <code>true</code> ) or not ( <code>false</code> ).	54.0
description	String	The description of a record alert.	54.0
effectiveDate	Datetime	The start date and time from when an active record alert is in effect.	54.0
id	String	The record alert ID.	54.0
parentId	String	The parent ID of a record alert.	54.0
recordAlertCategoryName	String	The category name of a record alert.	54.0
severity	<a href="#">ConnectApi.RecordAlertSeverityType</a>	Indicates the degree of impact of a record alert. Possible values are: <ul style="list-style-type: none"> <li>Error</li> <li>Info</li> <li>Warning</li> </ul>	54.0
source	<a href="#">ConnectApi.RecordAlertSourceTypeEnum</a>	Identifies the source system that generated the record alert. Possible values are: <ul style="list-style-type: none"> <li>Apex</li> <li>Internal</li> </ul>	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

Property Name	Type	Description	Available Version
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< <a href="#">ConnectApi.RecordAlertActionInfo</a> >	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: <ul style="list-style-type: none"> <li>Dismiss</li> <li>Snooze</li> </ul>	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
<code>ConnectApi.EthocaAlertOutcome</code>	Type of Ethoca alert outcome. <ul style="list-style-type: none"> <li>AccountSuspended</li> <li>InProgress</li> <li>NotFound</li> <li>NotProvided</li> <li>Other</li> <li>PartiallyStopped</li> <li>PreviouslyCancelled</li> <li>PreviouslyRefunded</li> <li>Resolved</li> </ul>

Enum	Description
	<ul style="list-style-type: none"> <li>• ShipperContacted</li> <li>• Stopped</li> <li>• TooLate</li> <li>• UnresolvedDispute</li> </ul>
ConnectApi. EthocaAlertRefundStatus	Type of Ethoca alert refund status. <ul style="list-style-type: none"> <li>• NotRefunded</li> <li>• NotSettled</li> <li>• Refunded</li> </ul>
ConnectApi. EthocaEventType	Type of Ethoca event. <ul style="list-style-type: none"> <li>• AlertOutcomeUpdated</li> <li>• BatchProcessed</li> </ul>
ConnectApi. RecordAlertSourceTypeEnum	Type of source system. <ul style="list-style-type: none"> <li>• Apex</li> <li>• Internal</li> </ul>
ConnectApi. RecordAlertSeverityType	Type of severity. <ul style="list-style-type: none"> <li>• Error</li> <li>• Info</li> <li>• Warning</li> </ul>

## 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
<a href="#">/recordalerts</a>	Retrieve a list of active record alerts.
<a href="#">/recordalerts/id/\${alertId}/actions</a>	Dismiss or snooze an internal record alert.
<a href="#">/recordalerts/externalId/\${sourceSystemId}/actions</a>	Dismiss or snooze an external record alert.
<a href="#">/recordalerts/batch</a>	Retrieve bulk record alerts.
<a href="#">/recordalerts/ids/actions</a>	Snooze bulk internal record alerts for a specified time period or dismiss them.

Resource	Description
<a href="#">/recordalerts/externalIds/actions</a>	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=001RO0000002JPkrYAG
```

```
https://yourInstance.salesforce.com/services/data/vXX.Xrecordalerts  
?whatId=a0URO000000Ccbz2AC&parentId=001RO0000002JPkrYAG
```

**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	<div><div></div><div><b>Note:</b> For external alerts, <code>whatId</code> can be any valid Salesforce ID. For internal alerts, <code>whatId</code> can only be polymorphic objects including all custom objects.</div></div> <div>Supported polymorphic objects are:</div> <ul style="list-style-type: none"><li>Account</li><li>Asset</li><li>BusinessMilestone</li><li>Campaign</li><li>Contract</li><li>Contact</li><li>Case</li><li>Claim</li><li>InsurancePolicy</li></ul>	Required	54.0

Parameter Name	Type	Description	Required or Optional	Available Version
		<ul style="list-style-type: none"> <li>InsurancePolicyCoverage</li> <li>InteractionSummary</li> <li>Lead</li> <li>LoanApplication</li> <li>LoanApplicantEmployment</li> <li>LoanApplicantIncome</li> <li>LoanApplicationProperty</li> <li>LoanApplicationFinancial</li> <li>LoanApplicationAsset</li> <li>LoanApplicationLiability</li> <li>Opportunity</li> <li>PersonLifeEvent</li> <li>ResidentialLoanApplication</li> <li>All Custom Objects</li> </ul>		


**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" : "a0UR000000Ccbz2AC"
} ]
}
```

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=03R00000026YJ8uIAG,001R00000026YJ8uIAG,00Dx00000004X2F
```

```
https://yourInstance.salesforce.com/services/data/vXX.X/recordalerts/batch?
parentIds=03R00000026YJ8uIAG,001R00000026YJ8uIAG,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 <a href="#">RecordAlert</a> .	Optional   <b>Note:</b> This parameter is required when <code>whatIds</code>	55.0

Parameter Name	Type	Description	Required or Optional	Available Version
			aren't provided.	
whatIds	String	<p>The Salesforce object record IDs on which record alerts are created.</p> <p> <b>Note:</b> For internal alerts, whatId can only be polymorphic objects, including all custom objects. For external alerts, whatId can be any valid Salesforce ID.</p> <p>For the supported polymorphic objects, see <a href="#">RecordAlert</a>.</p>	Optional	55.0
			 <b>Note:</b> This parameter is required when parentIds aren't provided.	

**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: <ul style="list-style-type: none"> <li>Dismiss—The record alert notification doesn't appear again.</li> <li>Snooze—The record alert notification reappears after the specified time period.</li> </ul>	Required	54.0
actionParameters	<a href="#">Record Alert Action Parameter Input[]</a>	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 perform 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	<a href="#">Record Alert Action Input[]</a>	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: <ul style="list-style-type: none"> <li>Dismiss—The record alert notification doesn't appear again.</li> <li>Snooze—The record alert notification reappears after the specified time period.</li> </ul>	Required	54.0
actionParameters	<a href="#">Record Alert Action Parameter Input[]</a>	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 perform 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": "0qZR000000000B1",
      "actionParameters": [
        {
          "name": "snoozeUntilDate",
          "value": "2022-03-08T02:16:35.477Z"
        }
      ],
      "actionName": "snooze"
    },
    {
      "recordAlertId": "0qZR000000000B2",
      "actionParameters": [],
      "actionName": "dismiss"
    },
    {
      "recordAlertId": "0qZR000000000B3",
      "actionParameters": [
        {
          "name": "snoozeUntilDate",
          "value": "2022-03-08T02:16:35.477Z"
        }
      ]
    }
  ]
}
```

```
    }
  ],
  "actionName": "snooze"
}
]
```

Properties

Name	Type	Description	Required or Optional	Available Version
actions	<a href="#">Record Alert Action Input[]</a>	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	<a href="#">Record Alert Action Input[]</a>	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: <ul style="list-style-type: none"><li>Dismiss—The record alert notification doesn't appear again.</li><li>Snooze—The record alert notification reappears after the specified time period.</li></ul>	Required	54.0
actionParameters	<a href="#">Record Alert Action Parameter Input[]</a>	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.   <b>Note:</b> You can specify <code>effectiveDate</code> 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": {
    "001RO000003KFW0YAO": {
      "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 ( <code>true</code> ) or not ( <code>false</code> ).	Small, 55.0	55.0

Property Name	Type	Description	Filter Group and Version	Available Version
results	Map<String, <a href="#">Record Alert Collection</a> >	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	<a href="#">Record Alert</a> []	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	<a href="#">Record Alert Action Info Collection</a>	Represents the details of an action taken on a record alert.	Small, 54.0	54.0
active	Boolean	Indicates whether a record alert is active ( <code>true</code> ) or not ( <code>false</code> ).	Small, 54.0	54.0
description	String	The description of a record alert.	Small, 54.0	54.0
effectiveDate	String	The start date and time from when an active record alert is in effect.	Small, 54.0	54.0
id	String	The record alert ID.	Small, 54.0	54.0
parentId	String	The parent ID of a record alert.	Small, 54.0	54.0
recordAlertCategoryName	String	The category name of a record alert.	Small, 54.0	54.0
severity	String	Indicates the degree of impact of a record alert.  Possible values are: <ul style="list-style-type: none"> <li>• <code>Error</code></li> <li>• <code>Info</code></li> <li>• <code>Warning</code></li> </ul>	Small, 54.0	54.0
source	String	Identifies the source system that generated the record alert.  Possible values are: <ul style="list-style-type: none"> <li>• <code>External</code></li> </ul>	Small, 54.0	54.0

Property Name	Type	Description	Filter Group and Version	Available Version
		<ul style="list-style-type: none"><li>Internal</li></ul>		
sourceSystemId	String	The ID of the source system that this record alert was sourced from.	Small, 54.0	54.0
subject	String	The subject line of a record alert.	Small, 54.0	54.0
validUntilDate	String	The date and time from when a record alert is no longer valid.	Small, 54.0	54.0
whatId	String	The Salesforce object record ID on which a record alert is created.	Small, 54.0	54.0

### Record Alert Action Info Collection

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

Property Name	Type	Description	Filter Group and Version	Available Version
actionInfoCollection	<a href="#">Record Alert Action Info[]</a>	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: <ul style="list-style-type: none"><li>Dismiss</li><li>Snooze</li></ul>	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": "0qZRO00000000B0",
    "severity": "Info",
    "snoozeUntilDate": "2022-03-21T15:26:45.000Z",
    "source": "Internal",
    "subject": "Alert Subject",
    "validUntilDate": "2022-03-31T19:00:00.000Z",
    "whatId": "001RO000003NJr"
  }
},
"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 ( <code>true</code> ) or not ( <code>false</code> ).	Small, 55.0	55.0
results	Map<String, <a href="#">Record Alert Action</a> >	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	<a href="#">Record Alert</a>	Record alert on which an action is performed.	Small, 53.0	53.0
recordAlertErrors	<a href="#">Record Alert Error</a> []	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
<code>description</code>	<p><b>Field Type</b> string</p> <p><b>Description</b> The description of the record alert category.</p>
<code>masterLabel</code>	<p><b>Field Type</b> string</p> <p><b>Description</b> Required. The user-interface name of the record alert category.</p>
<code>severity</code>	<p><b>Field Type</b> string</p> <p><b>Description</b> Indicates the degree of impact that an alert in this category can have. Possible Education Cloud values are:</p> <ul style="list-style-type: none"><li>• High</li><li>• Low</li><li>• Medium</li></ul> <p>Possible Financial Service Cloud values are:</p> <ul style="list-style-type: none"><li>• Error</li><li>• Info</li><li>• Minor</li><li>• Warning</li></ul>

## 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
<code>apexClass</code>	<p><b>Field Type</b> string</p> <p><b>Description</b> The Apex class to be used as the data source.</p> <p> <b>Note:</b> This class must implement the <code>fscwmgen.RecordAlertProvider</code> interface.</p>
<code>isActive</code>	<p><b>Field Type</b> boolean</p> <p><b>Description</b> Indicates whether this data source is still active (<code>true</code>) or not (<code>false</code>).</p> <p> <b>Note:</b> There can only be one active data source at a time.</p> <p>The default is <code>false</code>.</p>
<code>isProtected</code>	<p><b>Field Type</b> boolean</p> <p><b>Description</b> An auto-generated value that doesn't currently impact the behavior of the metadata type.</p>
<code>masterLabel</code>	<p><b>Field Type</b> string</p> <p><b>Description</b> Required.</p> <p>The user-interface name of the record alert category.</p>
<code>type</code>	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Restricted picklist, Sort</p> <p><b>Description</b> The type of active data source used to fetch a record alert. This field is available in API version 55.0 and later.</p> <p>Possible values are:</p> <ul style="list-style-type: none"><li>• <code>APEX</code></li><li>• <code>BusinessRulesEngine</code></li></ul>

## 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	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The description of the record alert category.</p>
DeveloperName	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> 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.</p> <p> <b>Note:</b> When creating large sets of data, always specify a unique <code>DeveloperName</code> for each record. If no <code>DeveloperName</code> is specified, performance slows down while Salesforce generates one for each record.</p>
FullName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Group, Nillable</p> <p><b>Description</b> 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.</p>

Field	Details
Language	<p><b>Type</b> picklist</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Language of the record alert category. Possible values are:</p> <ul style="list-style-type: none"> <li>• da—Danish</li> <li>• de—German</li> <li>• en_US—English</li> <li>• es—Spanish</li> <li>• es_MX—Spanish (Mexico)</li> <li>• fi—Finnish</li> <li>• fr—French</li> <li>• it—Italian</li> <li>• ja—Japanese</li> <li>• ko—Korean</li> <li>• nl_NL—Dutch</li> <li>• no—Norwegian</li> <li>• pt_BR—Portuguese (Brazil)</li> <li>• ru—Russian</li> <li>• sv—Swedish</li> <li>• th—Thai</li> <li>• zh_CN—Chinese (Simplified)</li> <li>• zh_TW—Chinese (Traditional)</li> </ul>
ManageableState	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Indicates the manageable state of the specified component that is contained in a package. Possible values are:</p> <ul style="list-style-type: none"> <li>• beta—Managed-Beta</li> <li>• deleted—Managed-Proposed-Deleted</li> <li>• deprecated—Managed-Proposed-Deprecated</li> <li>• deprecatedEditable—SecondGen-Installed-Deprecated</li> <li>• installed—Managed-Installed</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>• <code>installedEditable</code>—SecondGen-Installed-Editable</li> <li>• <code>released</code>—Managed-Released</li> <li>• <code>unmanaged</code>—Unmanaged</li> </ul>
MasterLabel	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, idLookup, Nillable, Sort</p> <p><b>Description</b> Label of the record alert category.</p>
Metadata	<p><b>Type</b> complexvalue</p> <p><b>Properties</b> Create, Nillable, Update</p> <p><b>Description</b> Record alert category metadata.</p>
NamespacePrefix	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> Namespace prefix associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix.</p>
Severity	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> Indicates the degree of impact that an alert in this category can have. Possible values are:</p> <ul style="list-style-type: none"> <li>• Error</li> <li>• Info</li> <li>• Warning</li> </ul>

## 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()`, `describeObjects()`, `query()`, `retrieve()`, `update()`, `upsert()`

## Supported REST API Methods

DELETE, GET, HEAD, PATCH, POST, Query

## Fields

Field	Details
ApexClass	<p><b>Field Type</b> string</p> <p><b>Description</b> The Apex class to be used as the data source.</p> <p> <b>Note:</b> This class must implement the <code>fscwmgen.RecordAlertProvider</code> interface.</p>
ApexClassId	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The ID of the Apex class to be used as the data source.</p> <p> <b>Note:</b> This class must implement the <code>fscwmgen.RecordAlertProvider</code> interface.</p> <p>This is a relationship field.</p> <p><b>Relationship Name</b> ApexClass</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> ApexClass</p>
DeveloperName	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p>

Field	Details
	<p><b>Description</b></p> <p>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.</p> <p> <b>Note:</b> When creating large sets of data, always specify a unique <code>DeveloperName</code> for each record. If no <code>DeveloperName</code> is specified, performance slows down while Salesforce generates one for each record.</p>
FullName	<p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Create, Group, Nillable</p> <p><b>Description</b></p> <p>Full name of the associated metadata type in Metadata API.</p> <p>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.</p>
IsActive	<p><b>Type</b></p> <p>boolean</p> <p><b>Properties</b></p> <p>Defaulted on create, Filter, Group, Nillable, Sort</p> <p><b>Description</b></p> <p>Indicates whether the data source is still active (<code>true</code>) or not (<code>false</code>).</p> <p> <b>Note:</b> There can only be one active data source at a time.</p> <p>The default value is <code>false</code>.</p>
Language	<p><b>Type</b></p> <p>picklist</p> <p><b>Properties</b></p> <p>Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b></p> <p>Language of the record alert data source.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>da</code>—Danish</li> <li>• <code>de</code>—German</li> <li>• <code>en_US</code>—English</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>• <code>es</code>—Spanish</li> <li>• <code>es_MX</code>—Spanish (Mexico)</li> <li>• <code>fi</code>—Finnish</li> <li>• <code>fr</code>—French</li> <li>• <code>it</code>—Italian</li> <li>• <code>ja</code>—Japanese</li> <li>• <code>ko</code>—Korean</li> <li>• <code>nl_NL</code>—Dutch</li> <li>• <code>no</code>—Norwegian</li> <li>• <code>pt_BR</code>—Portuguese (Brazil)</li> <li>• <code>ru</code>—Russian</li> <li>• <code>sv</code>—Swedish</li> <li>• <code>th</code>—Thai</li> <li>• <code>zh_CN</code>—Chinese (Simplified)</li> <li>• <code>zh_TW</code>—Chinese (Traditional)</li> </ul>
ManageableState	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Indicates the manageable state of the specified component that is contained in a package. Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>beta</code>—Managed-Beta</li> <li>• <code>deleted</code>—Managed-Proposed-Deleted</li> <li>• <code>deprecated</code>—Managed-Proposed-Deprecated</li> <li>• <code>deprecatedEditable</code>—SecondGen-Installed-Deprecated</li> <li>• <code>installed</code>—Managed-Installed</li> <li>• <code>installedEditable</code>—SecondGen-Installed-Editable</li> <li>• <code>released</code>—Managed-Released</li> <li>• <code>unmanaged</code>—Unmanaged</li> </ul>
MasterLabel	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, idLookup, Nillable, Sort</p> <p><b>Description</b> Label of the record alert data source.</p>

Field	Details
Metadata	<p><b>Type</b> complexvalue</p> <p><b>Properties</b> Create, Nillable, Update</p> <p><b>Description</b> Record alert data source metadata.</p>
NamespacePrefix	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> Namespace prefix associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix.</p>
Type	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Restricted picklist, Sort</p> <p><b>Description</b> 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:</p> <ul style="list-style-type: none"> <li>• APEX</li> <li>• BusinessRulesEngine</li> </ul>

## Record Rollup Definitions

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.

### [Record Rollup Definitions Standard Objects](#)

Use standard objects to manage record rollup definitions and data aggregation among records.

### [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.

### [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.

[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.

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	<p><b>Type</b></p> <p>reference</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Sort, Update</p> <p><b>Description</b></p> <p>The record from which data is aggregated.</p> <p>This field is a polymorphic relationship field.</p> <p><b>Relationship Name</b></p> <p>AggregateFromRecord</p>

Field	Details
	<b>Relationship Type</b> Lookup
AggregateToRecordId	<b>Type</b> reference <b>Properties</b> Create, Filter, Group, Sort, Update <b>Description</b> The record to which data is aggregated. This field is a polymorphic relationship field. <b>Relationship Name</b> AggregateToRecord <b>Relationship Type</b> Lookup
LastReferencedDate	<b>Type</b> dateTime <b>Properties</b> Filter, Nillable, Sort <b>Description</b> The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	<b>Type</b> dateTime <b>Properties</b> Filter, Nillable, Sort <b>Description</b> The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.
Name	<b>Type</b> string <b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort <b>Description</b> The name of the record aggregation result.
OwnerId	<b>Type</b> reference

Field	Details
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> The ID of the owner of this object. This field is a polymorphic relationship field.
	<b>Relationship Name</b> Owner
	<b>Relationship Type</b> Lookup
	<b>Refers To</b> Group, User
RecordAggregationDefinitionId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Sort, Update
	<b>Description</b> The record aggregation definition for the data aggregation from the aggregate-from record to the aggregate-to record. This field is a relationship field.
	<b>Relationship Name</b> RecordAggregationDefinition
	<b>Relationship Type</b> Lookup
	<b>Refers To</b> 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
<a href="#">/connect/record-aggregation/record-aggregation-definition/record-rollup-results</a> on page 1467 (POST)	Get rollup results for a specific record aggregation definition. Sort the data by name and arrange it in ascending or descending order.
<a href="#">/connect/record-aggregation/dpe-generation</a> on page 1466 (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/1600000001/record-rollup-results?anchorRecordId=1000000001
```

### 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 ( <i>true</i> ) or not ( <i>false</i> ). The default value is <i>true</i> .	Optional	61.0
sortBy	String	Criteria to sort the record aggregation results. The default value is <i>CreatedDate</i> .	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 <code>ALL</code> .	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 ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>true</code> .	Optional	61.0

Name	Type	Description	Required or Optional	Available Version
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 ( <code>true</code> ) or not ( <code>false</code> ).	Small, 59.0	59.0

Property Name	Type	Description	Filter Group and Version	Available Version
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 ( <code>true</code> ) or not ( <code>false</code> ). The value is <code>true</code> if <code>fieldApiName</code> is <code>Name</code> or if <code>displayFormatType</code> is <code>reference</code> , 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 ( <code>true</code> ) or not ( <code>false</code> ).	Small, 61.0	61.0

Property Name	Type	Description	Filter Group and Version	Available Version
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	<a href="#">Record Rollup Result Column[]</a>	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
message	String	Message for the HTTP response code.	Small, 61.0	61.0
rows	<a href="#">Record Rollup Result Row[]</a>	List of aggregated records that represent the rows of a table.	Small, 61.0	61.0
statusCode	String	HTTP response code for the request.	Small, 61.0	61.0
totalResult Count	Integer	Total number of record aggregation results.	Small, 61.0	61.0

## Record Rollup Result Row

Output representation of the consolidated view of the table row data.

### JSON Example

```

"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
<code>aggregateFromObject</code>	<b>Field Type</b> string <b>Description</b> Required. API name of the object from which data is aggregated.
<code>aggregateToObject</code>	<b>Field Type</b> string

Field Name	Description
	<b>Description</b> Required. API name of the object to which data is aggregated.
aggregationType	<b>Field Type</b> RecordAggregationDefinitionAggregationType (enumeration of type string) <b>Description</b> Required. Type of the data aggregation. Valid value is: <ul style="list-style-type: none"><li>• Record</li></ul>
batchProcessingDefinition	<b>Field Type</b> string <b>Description</b> Data Processing Engine definition that aggregates data from one record to another.
description	<b>Field Type</b> string <b>Description</b> Description for this record aggregation definition.
displayName	<b>Field Type</b> string <b>Description</b> Required. Name of the record aggregation definition that's displayed in the record page.
recordAggregationObject	<b>Field Type</b> <a href="#">RecordAggregationObject[]</a> <b>Description</b> List of record aggregation objects in the record aggregation join sequence.
status	<b>Field Type</b> RecordAggregationDefinitionStatus (enumeration of type string) <b>Description</b> Required. Status of this record aggregation definition. Values are:

Field Name	Description
	<ul style="list-style-type: none"><li>• Active</li><li>• Draft</li><li>• Inactive</li></ul>

## RecordAggregationObject

Represents an object in the record aggregation join sequence.

Field Name	Description
associatedObject	<b>Field Type</b> string <b>Description</b> Required. API name of the object associated with this record aggregation object.
developerName	<b>Field Type</b> string <b>Description</b> 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	<b>Field Type</b> string <b>Description</b> Logical sequence in which the record aggregation object filters associated with this record aggregation object are applied to the associated object's records. If you define two or more record aggregation object filters, but don't specify the sequence in which to apply the filters, the filters are applied by using a logical AND expression. Available in API version 60.0 and later.
masterLabel	<b>Field Type</b> string <b>Description</b> Required. A user-friendly name for RecordAggregationDefinition, which is defined when the RecordAggregationDefinition is created.
recordAggregationJoinCondition	<b>Field Type</b> <a href="#">RecordAggregationJoinCondition[]</a>

Field Name	Description
	<b>Description</b> List of join conditions that apply to this record aggregation object.
recordAggregationObjectFilter	<b>Field Type</b> <a href="#">RecordAggregationObjectFilter[]</a> <b>Description</b> List of filters that are applied to the records of this record aggregation object. Available in API version 60.0 and later.

## RecordAggregationJoinCondition

Represents a condition in a join between two record aggregation objects.

Field Name	Description
joinField	<b>Field Type</b> string <b>Description</b> Required. API name of the field on the record aggregation object's associated object that is used in the join condition.
navigationSequenceNumber	<b>Field Type</b> int <b>Description</b> Required. Sequence number corresponding to this join in the join sequence from the object to which the data is aggregated to the object that contains the data being aggregated.
relatedJoinField	<b>Field Type</b> string <b>Description</b> Required. API name of the field on the related record aggregation object's associated object that is used in the join condition.
relatedRecordAggregationObject	<b>Field Type</b> string <b>Description</b> Required. Second record aggregation object in the join condition.

Field Name	Description
type	<p><b>Field Type</b></p> <p>RecordAggregationJoinConditionType (enumeration of type string)</p> <p><b>Description</b></p> <p>Required.</p> <p>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.</p> <p>Valid values are:</p> <ul style="list-style-type: none"><li>• AggregateFrom</li><li>• AggregateTo</li><li>• Intermediate</li></ul>

## 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	<p><b>Field Type</b></p> <p>string</p> <p><b>Description</b></p> <p>Required.</p> <p>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.</p>
operator	<p><b>Field Type</b></p> <p>RecordAggregationObjectFilterOperator (enumeration of type string)</p> <p><b>Description</b></p> <p>Required.</p> <p>Operator used in the filter expression.</p> <p>Values are:</p> <ul style="list-style-type: none"><li>• Contains</li><li>• Equals</li><li>• GreaterThan</li><li>• GreaterThanOrEquals</li><li>• In</li><li>• LessThan</li><li>• LessThanOrEquals</li><li>• NotEquals</li></ul>

Field Name	Description
	<ul style="list-style-type: none"> <li>Not In</li> </ul>
sequenceNumber	<p><b>Field Type</b></p> <p>int</p> <p><b>Description</b></p> <p>Required.</p> <p>Sequence number of this record aggregation object filter.</p>
value	<p><b>Field Type</b></p> <p>string</p> <p><b>Description</b></p> <p>Required.</p> <p>Reference value with which the designated field's values are compared when the filter is applied on the associated object's records.</p>

## 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>
    </recordAggregationJoinCondition>
  </recordAggregationObject>
  <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>

</recordAggregationJoinCondition>
  </recordAggregationObject>
  <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 aggregation 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
<code>AggregateFromObject</code>	<b>Type</b> picklist

Field	Details
	<p><b>Properties</b> Filter, Group, Restricted picklist, Sort</p> <p><b>Description</b> Required. API name of the object from which data is aggregated.</p>
AggregateToObject	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Restricted picklist, Sort</p> <p><b>Description</b> Required. API name of the object to which data is aggregated.</p>
AggregationType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Restricted picklist, Sort</p> <p><b>Description</b> Required. Type of the data aggregation. Possible value is:</p> <ul style="list-style-type: none"> <li>• Record</li> </ul>
BatchProcessingDefinitionId	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> Data Processing Engine definition that aggregates data from one record to another. This field is a relationship field.</p> <p><b>Relationship Name</b> BatchProcessingDefinition</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> BatchCalcJobDefinition</p>

Field	Details
Description	<p><b>Type</b> textarea</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The description for this record aggregation definition.</p>
DeveloperName	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> Unique name for the RecordAggregationDefinition object.  The unique name of the object in the API. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization. Label is <b>Record Type Name</b>. This field is automatically generated, but you can supply your own value if you create the record using the API.</p>
DisplayName	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, idLookup, Sort</p> <p><b>Description</b> Required.  The name of the record aggregation definition that's displayed in the record page.</p>
FullName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Group, Nillable</p> <p><b>Description</b> The full name of the associated RecordAggregationDefinition type in Metadata API.  Query this field only if the query result contains no more than one record. Otherwise, an error is returned. If more than one record exists, use multiple queries to retrieve the records. This limit protects performance.</p>
Language	<p><b>Type</b> picklist</p>

Field	Details
	<p><b>Properties</b> Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> The language of the record aggregation definition. Possible values are:</p> <ul style="list-style-type: none"> <li>• da—Danish</li> <li>• de—German</li> <li>• en_US—English</li> <li>• es—Spanish</li> <li>• es_MX—Spanish (Mexico)</li> <li>• fi—Finnish</li> <li>• fr—French</li> <li>• it—Italian</li> <li>• ja—Japanese</li> <li>• ko—Korean</li> <li>• nl_NL—Dutch</li> <li>• no—Norwegian</li> <li>• pt_BR—Portuguese (Brazil)</li> <li>• ru—Russian</li> <li>• sv—Swedish</li> <li>• th—Thai</li> <li>• zh_CN—Chinese (Simplified)</li> <li>• zh_TW—Chinese (Traditional)</li> </ul>
MasterLabel	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> Label for the record aggregation definition.</p>
Metadata	<p><b>Type</b> <a href="#">RecordAggregationDefinition</a></p> <p><b>Properties</b> Create, Nillable, Update</p> <p><b>Description</b> The RecordAggregationDefinition's metadata.</p>
Status	<p><b>Type</b> picklist</p>

Field	Details
	<b>Properties</b> Defaulted on create, Filter, Group, Restricted picklist, Sort
	<b>Description</b> The status of the record aggregation definition. Possible values are: <ul style="list-style-type: none"> <li>• Active</li> <li>• Draft</li> <li>• Inactive</li> </ul> The default value is <code>Draft</code> .

## 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
<code>JoinField</code>	<b>Type</b> picklist
	<b>Properties</b> Create, Filter, Group, Restricted picklist, Sort, Update
	<b>Description</b> The API name of the field on the record aggregation object's associated object that is used in the join condition.
<code>NavigationSequenceNumber</code>	<b>Type</b> int
	<b>Properties</b> Create, Filter, Group, Sort, Update

Field	Details
	<p><b>Description</b></p> <p>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.</p>
RecordAggregationObjectId	<p><b>Type</b></p> <p>reference</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Sort</p> <p><b>Description</b></p> <p>The record aggregation object with which this record aggregation join condition is associated.</p> <p>This field is a relationship field.</p> <p><b>Relationship Name</b></p> <p>RecordAggregationObject</p> <p><b>Relationship Type</b></p> <p>Lookup</p> <p><b>Refers To</b></p> <p>RecordAggregationObject</p>
RelatedJoinField	<p><b>Type</b></p> <p>picklist</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b></p> <p>The API name of the field on the related record aggregation object's associated object that is used in the join condition.</p>
RelatedRecordAggrObjectId	<p><b>Type</b></p> <p>reference</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b></p> <p>The second record aggregation object in the join condition.</p> <p>This field is a relationship field.</p> <p><b>Relationship Name</b></p> <p>RelatedRecordAggrObject</p> <p><b>Relationship Type</b></p> <p>Lookup</p> <p><b>Refers To</b></p> <p>RecordAggregationObject</p>

Field	Details
Type	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> 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.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>AggregateFrom</li> <li>AggregateTo</li> <li>Intermediate</li> </ul>

## RecordAggregationObject

Represents an object in the record aggregation 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	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> The API name of the object associated with this record aggregation object.</p>

Field	Details
DeveloperName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The developer name of the record aggregation object. Can contain only underscores and alphanumeric characters and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.</p>
FilterLogic	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Logical sequence in which the record aggregation object filters associated with this record aggregation object are applied to the associated object's records. If you define two or more record aggregation object filters, but don't specify the sequence in which to apply the filters, the filters are applied by using a logical AND expression.  Available in API version 60.0 and later.</p>
Language	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The language of the record aggregation object. Possible values are:</p> <ul style="list-style-type: none"> <li>• da—Danish</li> <li>• de—German</li> <li>• en_US—English</li> <li>• es—Spanish</li> <li>• es_MX—Spanish (Mexico)</li> <li>• fi—Finnish</li> <li>• fr—French</li> <li>• it—Italian</li> <li>• ja—Japanese</li> <li>• ko—Korean</li> <li>• nl_NL—Dutch</li> <li>• no—Norwegian</li> <li>• pt_BR—Portuguese (Brazil)</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>• ru—Russian</li> <li>• sv—Swedish</li> <li>• th—Thai</li> <li>• zh_CN—Chinese (Simplified)</li> <li>• zh_TW—Chinese (Traditional)</li> </ul>
MasterLabel	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> Label for the record aggregation object.</p>
RecordAggregationDefinitionId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> The record aggregation definition with which this record aggregation object is associated. This field is a relationship field.</p> <p><b>Relationship Name</b> RecordAggregationDefinition</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> RecordAggregationDefinition</p>

## 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	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> 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.</p>
Operator	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> Operator used in the filter expression. Possible values are:</p> <ul style="list-style-type: none"> <li>• Contains</li> <li>• Equals</li> <li>• GreaterThan</li> <li>• GreaterThanOrEquals</li> <li>• In</li> <li>• LessThan</li> <li>• LessThanOrEquals</li> <li>• NotEquals</li> <li>• NotIn</li> </ul>
RecordAggregationObjectId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> The record aggregation object with which this record aggregation object filter is associated. This field is a relationship field.</p> <p><b>Relationship Name</b> RecordAggregationObject</p>

Field	Details
	<b>Relationship Type</b> Lookup
	<b>Refers To</b> RecordAggregationObject
SequenceNumber	<b>Type</b> int
	<b>Properties</b> Create, Filter, Group, Sort, Update
	<b>Description</b> Sequence number of this record aggregation object filter.
Value	<b>Type</b> string
	<b>Properties</b> Create, Filter, Group, Sort, Update
	<b>Description</b> Reference value with which the designated field's values are compared when the filter is applied on the associated object's records.

## Scheduled Reminders

Create automatic email reminders to remind users about important events. You can send reminders regularly or just once to keep people informed and prepared for completed actions.

[Scheduled Reminders Standard Objects](#)

Use the standard objects to create and send scheduled reminders.

[Scheduled Reminders Business APIs](#)

Use the Scheduled Reminders Business APIs to create and update the reminder definitions and the communication channels that are used to send reminders.

EDITIONS

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

## Scheduled Reminders Standard Objects

Use the standard objects to create and send scheduled reminders.

[ReminderDefinition](#)

Represents information about the condition, rule, and related configuration that's set for a reminder. This object is available in API version 60.0 and later.

[ReminderDefinitionChannel](#)

Represents the channel that's used to send the reminder. This object is available in API version 60.0 and later.

EDITIONS

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

[ReminderRecord](#)

Represents a reminder that's sent. This object is available in API version 60.0 and later.

[ScheduledReminder](#)

Represents information about the reminder schedule. This object is available in API version 60.0 and later.

## ReminderDefinition

Represents information about the condition, rule, and related configuration that's set for a reminder. This object is available in API version 60.0 and later.

## Supported Calls

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

## Fields

Field	Details
Condition	<b>Type</b> textarea  <b>Properties</b> Nillable  <b>Description</b> The condition that's used to schedule the reminder.
EndDateTime	<b>Type</b> dateTime  <b>Properties</b> Filter, Nillable, Sort  <b>Description</b> The date until when the reminder will be sent.
FirstReminderInterval	<b>Type</b> int  <b>Properties</b> Filter, Group, Nillable, Sort  <b>Description</b> The number of days after which the first reminder is sent.
FourthReminderInterval	<b>Type</b> int  <b>Properties</b> Filter, Group, Nillable, Sort

Field	Details
	<b>Description</b> The number of days after which the fourth reminder should be sent.
LastReferencedDate	<b>Type</b> dateTime <b>Properties</b> Filter, Nillable, Sort <b>Description</b> The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	<b>Type</b> dateTime <b>Properties</b> Filter, Nillable, Sort <b>Description</b> The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate field isn't null, the user accessed this record or list view indirectly.
MaximumRecurrenceCount	<b>Type</b> int <b>Properties</b> Filter, Group, Nillable, Sort <b>Description</b> The maximum number of times the reminder will be sent.
Name	<b>Type</b> string <b>Properties</b> Filter, Group, idLookup, Sort <b>Description</b> The name of the reminder definition.
OccurrenceType	<b>Type</b> picklist <b>Properties</b> Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort <b>Description</b> The occurrence of the reminder for an event.  Valid values are:

Field	Details
	<ul style="list-style-type: none"> <li>• <code>PostEvent</code></li> <li>• <code>PreEvent</code></li> </ul> <p>The default value is <code>PostEvent</code>. This field is available in API version 61.0 and later.</p>
<code>OwnerId</code>	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> ID of the owner of this object. This field is a polymorphic relationship field.</p> <p><b>Relationship Name</b> Owner</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> Group, User</p>
<code>RecurrenceRule</code>	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The recurrence rule that's used for the schedule if the reminder is recurring type.</p>
<code>RelatedObjectName</code>	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The name of the object for which the reminder definition is created. This field is available in API version 61.0 and later.</p>
<code>RelatedRecordId</code>	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The record for which the reminder definition is being defined. This field is a relationship field.</p>

Field	Details
	<b>Relationship Name</b> RelatedRecord <b>Relationship Type</b> Lookup <b>Refers To</b> Survey
SecondReminderInterval	<b>Type</b> int <b>Properties</b> Filter, Group, Nillable, Sort <b>Description</b> The number of days after which the second reminder should be sent.
Status	<b>Type</b> picklist <b>Properties</b> Defaulted on create, Filter, Group, Restricted picklist, Sort <b>Description</b> Specifies the status of the reminder. Valid values are: <ul style="list-style-type: none"> <li>Active</li> <li>Draft</li> <li>Inactive</li> </ul> The default value is Draft.
ThirdReminderInterval	<b>Type</b> int <b>Properties</b> Filter, Group, Nillable, Sort <b>Description</b> The number of days after which the third reminder should be sent.
Type	<b>Type</b> picklist <b>Properties</b> Defaulted on create, Filter, Group, Restricted picklist, Sort <b>Description</b> Specifies the type of the reminder. Valid values are:

Field	Details
	<ul style="list-style-type: none"> <li>• Nonrecurring</li> <li>• Recurring</li> </ul> <p>The default value is <code>Recurring</code>.</p>

## Associated Objects

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

### [ReminderDefinitionHistory](#)

History is available for tracked fields of the object.

### [ReminderDefinitionOwnerSharingRule](#)

Sharing rules are available for the object.

### [ReminderDefinitionShare](#)

Sharing is available for the object.

## ReminderDefinitionChannel

Represents the channel that's used to send the reminder. 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()`, `undelete()`, `update()`, `upsert()`

## Fields

Field	Details
Content	<p><b>Type</b> textarea</p> <p><b>Properties</b> Create, Nillable, Update</p> <p><b>Description</b> The content of the template that's used for the reminder. The template can be a customized or standard template.</p>
LastReferencedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p>

Field	Details
	<b>Description</b> The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	<b>Type</b> dateTime <b>Properties</b> Filter, Nillable, Sort <b>Description</b> The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate field isn't null, the user accessed this record or list view indirectly.
MessagingChannelId	<b>Type</b> reference <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> The ID of the messaging channel that's used to send the reminder. This field is available in API version 61.0 and later. This field is a relationship field. <b>Relationship Name</b> MessagingChannel <b>Refers To</b> MessagingChannel
Name	<b>Type</b> string <b>Properties</b> Create, Filter, Group, idLookup, Sort, Update <b>Description</b> The name of the Reminder Definition Channel.
RelatedTemplateId	<b>Type</b> reference <b>Properties</b> Create, Filter, Group, Nillable, Sort, Update <b>Description</b> The template that's used for the reminder. This field is a relationship field.

Field	Details
	<p><b>Relationship Name</b> RelatedTemplate</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> EmailTemplate</p>
ReminderDefinitionId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> The reminder definition that's used to schedule the reminder. This field is a relationship field.</p> <p><b>Relationship Name</b> ReminderDefinition</p> <p><b>Relationship Type</b> Master-detail</p> <p><b>Refers To</b> ReminderDefinition (the master object)</p>
SentFrom	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The identifier of the sender of the reminder.</p>
Type	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> Specifies the type of channel that's used to distribute the reminder. Valid values are:</p> <ul style="list-style-type: none"> <li>• Custom</li> <li>• Email</li> <li>• Facebook</li> <li>• Sms—SMS</li> <li>• Whatsapp</li> </ul>

## Associated Objects

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

### [ReminderDefinitionChannelHistory](#)

History is available for tracked fields of the object.

## ReminderRecord

Represents a reminder that's sent. This object is available in API version 60.0 and later.

## Supported Calls

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

## Fields

Field	Details
ChannelType	<p><b>Type</b></p> <p>picklist</p> <p><b>Properties</b></p> <p>Create, Filter, Restricted picklist, Sort</p> <p><b>Description</b></p> <p>Specifies the channel that's used to send the reminder.</p> <p>Valid values are:</p> <ul style="list-style-type: none"><li>• Custom</li><li>• Email</li><li>• Facebook</li><li>• Sms—SMS</li><li>• Whatsapp</li></ul>
ErrorMessage	<p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Create, Nillable</p> <p><b>Description</b></p> <p>The error message when the reminder fails to send.</p>
LastReminderDateTime	<p><b>Type</b></p> <p>dateTime</p> <p><b>Properties</b></p> <p>Create, Filter, Sort</p>

Field	Details
	<b>Description</b> The date when the reminder is sent.
ScheduledReminder	<b>Type</b> string <b>Properties</b> Create, Nillable <b>Description</b> The reminder criteria that's associated with the distribution.
Status	<b>Type</b> picklist <b>Properties</b> Create, Defaulted on create, Filter, Restricted picklist, Sort <b>Description</b> The status of the reminder that's associated with a record. Valid values are: <ul style="list-style-type: none"> <li>Failed</li> <li>Success</li> </ul> The default value is Success.

## ScheduledReminder

Represents information about the reminder schedule. This object is available in API version 60.0 and later.

### Supported Calls

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

### Fields

Field	Details
RelatedRecord	<b>Type</b> string <b>Properties</b> Create, Filter, Sort <b>Description</b> The record in an object for which the reminder is scheduled.

Field	Details
ReminderDefinitionId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Sort</p> <p><b>Description</b> The reminder criteria that's associated with the schedule. This field is a relationship field.</p> <p><b>Relationship Name</b> ReminderDefinition</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> ReminderDefinition</p>
ScheduledDateTime	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Create, Filter, Sort</p> <p><b>Description</b> The date when the reminder will be sent.</p>
UniqueIdentifier	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Sort</p> <p><b>Description</b> The identifier of the reminder schedule.</p>

## Scheduled Reminders Business APIs

Use the Scheduled Reminders Business APIs to create and update the reminder definitions and the communication channels that are used to send reminders.

### Available Resources

Resource	Description
<a href="#">/connect/reminder/reminder-definition</a> (POST, PATCH)	Create and update a reminder definition and a communication channel to send reminders to users about important occurrences and occasions.

[REST Reference](#)

You can access Scheduled Reminders Business APIs by using REST endpoint that follows similar conventions as Connect REST APIs.

## REST Reference

You can access Scheduled Reminders Business APIs by using REST endpoint that follows similar conventions as Connect REST APIs.

[Resources](#)

Learn more about the available resources of Scheduled Reminders Business APIs.

[Request Bodies](#)

Learn more about the available request bodies of the Scheduled Reminders Business APIs.

[Response Bodies](#)

Learn more about the available response body of Scheduled Reminders Business APIs.

**SEE ALSO:**

[Connect REST API Developer Guide: Connect REST API Introduction](#)

## Resources

Learn more about the available resources of Scheduled Reminders Business APIs.

[Reminder Definition \(POST, PATCH\)](#)

Create and update a reminder definition and a communication channel to send reminders to users about important occurrences and occasions.

### Reminder Definition (POST, PATCH)

Create and update a reminder definition and a communication channel to send reminders to users about important occurrences and occasions.

Configure a reminder by defining the reminder schedule type, such as recurring and non-recurring. Set rules and communication channels for a reminder to send the desired notifications to the users.

**Resource**

```
/connect/reminder/reminder-definition
```

**Resource example**

```
https://yourInstance.salesforce.com/services/data/v63.0/connect/reminder/reminder-definition
```

**Available version**

60.0

**HTTP methods**

POST, PATCH

**Request body for POST****JSON example**

Here's a sample to create non-recurring reminders.

```
{
  "name": "FirstReminder",
  "parentRecordId": "0Kdxx0000004C92CAE",
  "status": "Draft",
  "schedule": {
    "scheduleType": "NonRecurring",
    "firstReminderInterval": 1,
    "secondReminderInterval": 1,
    "thirdReminderInterval": 1,
    "fourthReminderInterval": 1
  },
  "reminderChannels": [
    {
      "channel": "Email",
      "templateId": "00Xxx000000k1DvEAI",
      "sendFrom": "john.doe@example.com"
    }
  ],
  "rule": {
    "criteriaLogic": "And",
    "criteria": [
      {
        "operator": "Equals",
        "field": "Status",
        "fieldType": "StaticEnum",
        "value": "Completed"
      }
    ]
  }
}
```

This example shows a sample to create recurring reminders.

```
{
  "name": "FirstReminder",
  "parentRecordId": "0Kdxx0000004C92CAE",
  "status": "Draft",
  "schedule": {
    "recurrenceRule": "RRULE:FREQ=DAILY;INTERVAL=1;UNTIL=20231130T000000Z;",
    "scheduleType": "Recurring"
  },
  "reminderChannels": [
    {
      "channel": "Email",
      "templateId": "00Xxx000000k1DvEAI",
      "sendFrom": "john.doe@example.com"
    }
  ],
  "rule": {
    "criteriaLogic": "And",
```

```

    "criteria": [
      {
        "operator": "Equals",
        "field": "Status",
        "fieldType": "StaticEnum",
        "value": "Completed"
      }
    ]
  }
}

```

### Properties

Name	Type	Description	Required or Optional	Available Version
event	String	Reserved for future use.	Optional	60.0
name	String	Name of the reminder definition.	Required	60.0
parentEntity	String	Reserved for future use.	Optional	60.0
parentRecordId	String	ID of the record for which the reminder is created.	Required	60.0
reminderChannels	<a href="#">Reminder Email Channel Input []</a>	Communication channel that's used to send the reminder.	Required	60.0
rule	<a href="#">Reminder Logical Operation Rule Input[]</a>	Rule that's used to configure the reminder.	Optional	60.0
schedule	<a href="#">Reminder Non-Recurrence Schedule Input</a> <a href="#">Reminder Recurrence Schedule Input</a>	Schedule that's used to send the reminder.	Required	60.0
status	String	Status of the reminder definition. Valid values are: <ul style="list-style-type: none"> <li>• <b>Active</b>—The reminder is operational and is actively providing notifications based on the specified schedule or rule.</li> <li>• <b>Draft</b>—The reminder is created but not activated. You can modify the reminder definition if the status is <b>Draft</b>.</li> <li>• <b>Inactive</b>—The reminder is either deactivated or expired.</li> </ul>	Required	60.0

Response body for POST

[Reminder Details](#)

Request body for PATCH

JSON example

Here's a sample input of a non-recurring reminder to update the reminder.

```
{
  "id": "17jsB00000000eLYAQ",
  "name": "FirstReminder",
  "parentRecordId": "0Kdxx0000004C92CAE",
  "status": "Draft",
  "schedule": {
    "reminderType": "NonRecurring",
    "firstReminderInterval": 1,
    "secondReminderInterval": 5,
    "thirdReminderInterval": 9,
    "fourthReminderInterval": 13
  },
  "reminderChannels": [
    {
      "reminderDefinitionChannelId": "17kSB000000Y4dtYAC",
      "channel": "Email",
      "templateId": "00Xxx000000k1DvEAI",
      "sendFrom": "john.doe@example.com",
      "operationType": "Update"
    }
  ],
  "rule": {
    "criteriaLogic": "Or",
    "criteria": [
      {
        "operator": "Equals",
        "field": "Status",
        "fieldType": "StaticEnum",
        "value": "Completed"
      },
      {
        "operator": "NotEquals",
        "field": "Status",
        "fieldType": "Integer",
        "value": 7
      }
    ]
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
id	String	ID of the reminder definition.	Required	60.0

## Response body for PATCH

[Reminder Details](#)

## Request Bodies

Learn more about the available request bodies of the Scheduled Reminders Business APIs.

### [Reminder Create Input](#)

Input representation of a reminder definition to configure reminders along with the reminder channel.

### [Reminder Update Input](#)

Input representation of a reminder definition to update the reminder based on the ID of the reminder definition.

### [Reminder Email Channel Input](#)

Input representation of an email channel that's used to send a reminder.

### [Reminder Logical Operation Rule Input](#)

Input representation of the logical rule that's used to configure a reminder.

### [Reminder Boolean Criteria Input](#)

Input representation of the boolean criteria of a reminder.

### [Reminder Date Criteria Input](#)

Input representation of the date criteria of a reminder.

### [Reminder Decimal Criteria Input](#)

Input representation of the decimal criteria of a reminder.

### [Reminder Integer Criteria Input](#)

Input representation of the integer criteria of a reminder.

### [Reminder Text Criteria Input](#)

Input representation of the text criteria of a reminder.

### [Reminder Nonrecurring Schedule Input](#)

Input representation of the nonrecurring schedule of a reminder.

### [Reminder Recurring Schedule Input](#)

Input representation of the recurring schedule of a reminder.

## Reminder Create Input

Input representation of a reminder definition to configure reminders along with the reminder channel.

### JSON example

Here's a sample to create non-recurring reminders.

```
{
  "name": "FirstReminder",
  "parentRecordId": "0Kdxx0000004C92CAE",
  "status": "Draft",
  "schedule": {
    "scheduleType": "NonRecurring",
    "firstReminderInterval": 1,
    "secondReminderInterval": 1,
    "thirdReminderInterval": 1,
  }
}
```

```

    "fourthReminderInterval": 1
  },
  "reminderChannels": [
    {
      "channel": "Email",
      "templateId": "00Xxx000000k1DvEAI",
      "sendFrom": "john.doe@example.com"
    }
  ],
  "rule": {
    "criteriaLogic": "And",
    "criteria": [
      {
        "operator": "Equals",
        "field": "Status",
        "fieldType": "StaticEnum",
        "value": "Completed"
      }
    ]
  }
}

```

This example shows a sample to create recurring reminders.

```

{
  "name": "FirstReminder",
  "parentRecordId": "0Kdxx0000004C92CAE",
  "status": "Draft",
  "schedule": {
    "recurrenceRule": "RRULE:FREQ=DAILY;INTERVAL=1;UNTIL=20231130T000000Z;",
    "scheduleType": "Recurring"
  },
  "reminderChannels": [
    {
      "channel": "Email",
      "templateId": "00Xxx000000k1DvEAI",
      "sendFrom": "john.doe@example.com"
    }
  ],
  "rule": {
    "criteriaLogic": "And",
    "criteria": [
      {
        "operator": "Equals",
        "field": "Status",
        "fieldType": "StaticEnum",
        "value": "Completed"
      }
    ]
  }
}

```

**Properties**

<b>Name</b>	<b>Type</b>	<b>Description</b>	<b>Required or Optional</b>	<b>Available Version</b>
event	String	Reserved for future use.	Optional	60.0
name	String	Name of the reminder definition.	Required	60.0
parentEntity	String	Reserved for future use.	Optional	60.0
parentRecordId	String	ID of the record for which the reminder is created.	Required	60.0
reminderChannels	<a href="#">Reminder Email Channel Input []</a>	Communication channel that's used to send the reminder.	Required	60.0
rule	<a href="#">Reminder Logical Operation Rule Input[]</a>	Rule that's used to configure the reminder.	Optional	60.0
schedule	<a href="#">Reminder Non-Recurrence Schedule Input</a> <a href="#">Reminder Recurrence Schedule Input</a>	Schedule that's used to send the reminder.	Required	60.0
status	String	Status of the reminder definition. Valid values are: <ul style="list-style-type: none"> <li>• <b>Active</b>—The reminder is operational and is actively providing notifications based on the specified schedule or rule.</li> <li>• <b>Draft</b>—The reminder is created but not activated. You can modify the reminder definition if the status is <b>Draft</b>.</li> <li>• <b>Inactive</b>—The reminder is either deactivated or expired.</li> </ul>	Required	60.0

**Reminder Update Input**

Input representation of a reminder definition to update the reminder based on the ID of the reminder definition.

JSON example

Here's a sample input of a non-recurring reminder to update the reminder.

```
{
  "id": "17jSB00000000eLYAQ",
  "name": "FirstReminder",
  "parentRecordId": "0Kdxx0000004C92CAE",
  "status": "Draft",
  "schedule": {
    "reminderType": "NonRecurring",
    "firstReminderInterval": 1,
    "secondReminderInterval": 5,
    "thirdReminderInterval": 9,
    "fourthReminderInterval": 13
  },
  "reminderChannels": [
    {
      "reminderDefinitionChannelId": "17kSB000000Y4dtYAC",
      "channel": "Email",
      "templateId": "00Xxx000000k1DvEAI",
      "sendFrom": "john.doe@example.com",
      "operationType": "Update"
    }
  ],
  "rule": {
    "criteriaLogic": "Or",
    "criteria": [
      {
        "operator": "Equals",
        "field": "Status",
        "fieldType": "StaticEnum",
        "value": "Completed"
      },
      {
        "operator": "NotEquals",
        "field": "Status",
        "fieldType": "Integer",
        "value": 7
      }
    ]
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
id	String	ID of the reminder definition.	Required	60.0

Reminder Email Channel Input

Input representation of an email channel that's used to send a reminder.

### JSON example

Here's a sample of the reminder channel that's used to send the reminder.

```
{
  "reminderChannels": [
    {
      "channel": "Email",
      "templateId": "00Xxx000000k1DvEAI",
      "sendFrom": "john.doe@example.com"
    }
  ]
}
```

### Properties

Name	Type	Description	Required or Optional	Available Version
channel	String	Communication channel that's used to send the reminder. Valid value is <code>Email</code> .	Required	60.0
operationType	String	Type of the HTTP operation that the reminder definition channel supports. Valid values are: <ul style="list-style-type: none"><li>• <code>Create</code></li><li>• <code>Update</code></li></ul> The default value is <code>Create</code> .	Optional	60.0
reminderDefinitionChannelId	String	ID of the reminder definition channel that's used to send the reminder.	Required to update a reminder.	60.0
templateId	String	ID of the messaging template that's used to send the reminder.	Required to create a reminder.	60.0
sendFrom	String	Email address that's used to send the reminder.	Required	60.0

### Reminder Logical Operation Rule Input

Input representation of the logical rule that's used to configure a reminder.

### JSON example

Here's a sample of the criteria logic to configure the reminder.

```
{
  "rule": {
    "criteriaLogic": "And",
    "criteria": [
      {
        "operator": "Equals",
        "field": "Status",
        "fieldType": "StaticEnum",

```

```
{
  "value": "Completed"
}
```

### Properties

Name	Type	Description	Required or Optional	Available Version
criteria	<a href="#">Reminder Date Criteria Input[]</a> <a href="#">Reminder Decimal Criteria Input[]</a> <a href="#">Reminder Integer Criteria Input[]</a> <a href="#">Reminder Text Criteria Input[]</a> <a href="#">Reminder Boolean Criteria Input[]</a>	Criteria to send the reminder.	Required	60.0
criteriaLogic	String	Logic type between each criterion within the <code>criteria</code> property. Valid values are: <ul style="list-style-type: none"><li>• And</li><li>• Or</li></ul>	Required	60.0

### Reminder Boolean Criteria Input

Input representation of the boolean criteria of a reminder.

#### JSON example

Here's a sample of the boolean criteria to configure the reminder.

```
{
  "criteria": [
    {
      "operator": "Equals",
      "field": "isTrue",
      "fieldType": "Boolean",
      "value": "1"
    }
  ]
}
```

**Properties**

Name	Type	Description	Required or Optional	Available Version
field	String	Name of the criteria field of the reminder.	Required	60.0
fieldType	String	Type of the criteria field of the reminder. Valid value is <code>Boolean</code> .	Required	60.0
operator	String	Operator between the <code>field</code> and <code>value</code> properties within the reminder <code>criteria</code> property that's used to configure the reminder. Valid values are: <ul style="list-style-type: none"><li>• <code>Equals</code></li><li>• <code>NotEquals</code></li></ul>	Required	60.0
value	Boolean	Boolean value in the criteria <code>field</code> property of the reminder.	Required	60.0

**Reminder Date Criteria Input**

Input representation of the date criteria of a reminder.

**JSON example**

Here's a sample of the date criteria to configure the reminder.

```
{
  "criteria": [
    {
      "operator": "Equals",
      "field": "Date",
      "fieldType": "Datetime",
      "value": "10-12-2023 9:47:56"
    }
  ]
}
```

**Properties**

Name	Type	Description	Required or Optional	Available Version
field	String	Name of the criteria field of the reminder.	Required	60.0
fieldType	String	Criteria field type of the reminder. Valid value is <code>Datetime</code> .	Required	60.0
operator	String	Operator between the <code>field</code> and <code>value</code> properties within the reminder	Required	60.0

Name	Type	Description	Required or Optional	Available Version
		criteria property that's used to configure the reminder. Valid values are: <ul style="list-style-type: none"><li>• Equals</li><li>• GreaterThan</li><li>• GreaterThanOrEqualTo</li><li>• LessThan</li><li>• LessThanOrEqualTo</li><li>• NotEquals</li></ul>		
value	String	The timestamp value in the date criteria field property of the reminder.	Required	60.0

## Reminder Decimal Criteria Input

Input representation of the decimal criteria of a reminder.

### JSON example

Here's a sample of the decimal type criteria to configure the reminder.

```
{
  "criteria": [
    {
      "operator": "Equals",
      "field": "DecimalField",
      "fieldType": "Decimal",
      "value": "10.0"
    }
  ]
}
```

### Properties

Name	Type	Description	Required or Optional	Available Version
field	String	Name of the criteria field of the reminder.	Required	60.0
fieldType	String	Criteria field type of the reminder. Valid value is <code>Decimal</code> .	Required	60.0
operator	String	Operator between <code>field</code> and <code>value</code> properties within the reminder criteria property that's used to configure the reminder. Valid values are: <ul style="list-style-type: none"><li>• Equals</li><li>• GreaterThan</li><li>• GreaterThanOrEqualTo</li></ul>	Required	60.0

Name	Type	Description	Required or Optional	Available Version
		<ul style="list-style-type: none"><li>• LessThan</li><li>• LessThanOrEqualTo</li><li>• NotEquals</li></ul>		
value	Double	Decimal value in the decimal criteria field property of the reminder.	Required	60.0

## Reminder Integer Criteria Input

Input representation of the integer criteria of a reminder.

### JSON example

Here's a sample of the integer type criteria to configure the reminder.

```
{
  "criteria": [
    {
      "operator": "Equals",
      "field": "IntegerField",
      "fieldType": "Integer",
      "value": "10"
    }
  ]
}
```

### Properties

Name	Type	Description	Required or Optional	Available Version
field	String	Name of the criteria field of the reminder.	Required	60.0
fieldType	String	Criteria field type of the reminder. Valid value is <code>Integer</code> .	Required	60.0
operator	String	Operator between the <code>field</code> and <code>value</code> properties within the reminder <code>criteria</code> property that's used to configure the reminder. Valid values are: <ul style="list-style-type: none"><li>• Equals</li><li>• GreaterThan</li><li>• GreaterThanOrEqualTo</li><li>• LessThan</li><li>• LessThanOrEqualTo</li><li>• NotEquals</li></ul>	Required	60.0

Name	Type	Description	Required or Optional	Available Version
value	Integer	Integer value of the <code>field</code> property of the reminder criteria.	Required	60.0

## Reminder Text Criteria Input

Input representation of the text criteria of a reminder.

### JSON example

Here's a sample of the text type criteria to configure the reminder.

```
{
  "criteria": [
    {
      "operator": "Contains",
      "field": "TextField",
      "fieldType": "Text",
      "value": "reminder-definition"
    }
  ]
}
```

### Properties

Name	Type	Description	Required or Optional	Available Version
field	String	Name of the criteria field of the reminder.	Required	60.0
fieldType	String	Criteria field type of the reminder. Valid values are: <ul style="list-style-type: none"><li>• Text</li><li>• Reference</li><li>• StaticEnum</li></ul>	Required	60.0
operator	String	Operator between the <code>field</code> and <code>value</code> properties within the reminder <code>criteria</code> property that's used to configure the reminder. Valid values are: <ul style="list-style-type: none"><li>• Contains</li><li>• EndsWith</li><li>• Equals</li><li>• NotEquals</li><li>• StartsWith</li></ul>	Required	60.0
value	String	Value of the text criteria <code>field</code> property of the reminder.	Required	60.0

Reminder Nonrecurring Schedule Input

Input representation of the nonrecurring schedule of a reminder.

JSON example

Here’s a sample to configure a nonrecurring reminder.

```
{
  "schedule": {
    "scheduleType": "NonRecurring",
    "firstReminderInterval": 1,
    "secondReminderInterval": 3,
    "thirdReminderInterval": 5,
    "fourthReminderInterval": 7
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
firstReminderInterval	Integer	Number of days after which the first reminder is sent.	Required	60.0
fourthReminderInterval	Integer	Number of days after which the fourth reminder must be sent.	Optional	60.0
secondReminderInterval	Integer	Number of days after which the second reminder must be sent.	Optional	60.0
scheduleType	String	Schedule type of the reminder. Valid value is NonRecurring.	Required	60.0
thirdReminderInterval	Integer	Number of days after which the third reminder must be sent.	Optional	60.0

Reminder Recurring Schedule Input

Input representation of the recurring schedule of a reminder.

JSON example

Here’s a sample to configure a recurring reminder.

```
{
  "schedule": {
    "recurrenceRule": "RRULE:FREQ=DAILY;INTERVAL=1;UNTIL=20231130T000000Z;",
    "scheduleType": "Recurring"
  }
}
```

## Properties

Name	Type	Description	Required or Optional	Available Version
recurrenceRule	String	Recurrence rule for the reminder.	Required	60.0
scheduleType	String	Schedule type of the reminder. Valid value is <code>Recurring</code> .	Required	60.0

## Response Bodies

Learn more about the available response body of Scheduled Reminders Business APIs.

Refer to [HTTP response code](#) to find out whether the request was successful or not, as well as the error messages for the failed requests.

### Reminder Details

Output representation of the reminder definition request to create or update a reminder.

## Reminder Details

Output representation of the reminder definition request to create or update a reminder.

### JSON example

Here's a sample response body of a created or updated reminder definition.

```
{
  "errors": [],
  "reminderDefinitionId": "17jSB00000000fx",
  "reminderDefinitionName": "Reminder-Status",
  "status": "Success",
  "warnings": []
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
errors	String[]	Errors that indicate why the request failed.	Small, 60.0	60.0
reminderDefinitionId	String	ID of the reminder definition that's created or updated.	Small, 60.0	60.0
reminderDefinitionName	String	Name of the reminder definition.	Small, 60.0	60.0
status	String	Status of the reminder definition that's created or updated. Valid values are: <ul style="list-style-type: none"><li>Failure</li><li>Success</li></ul>	Small, 60.0	60.0

Property Name	Type	Description	Filter Group and Version	Available Version
warnings	String[]	Warnings that are shown when the request is processed.	Small, 60.0	60.0

## Sentiment Insights

Analyze the sentiment of your customers and get actionable insights to improve it. Sentiment Insights uses the Amazon Comprehend BatchDetectSentiment API with your AWS account to get insights about your customers' sentiment based on their feedback.

### [Sentiment Insights Standard Objects](#)

Use the standard objects to view the result of the sentiment analysis.

## Sentiment Insights Standard Objects

Use the standard objects to view the result of the sentiment analysis.

### [AISentimentResult](#)

Represents the outcome of the sentiment analysis performed on a text field of a Salesforce object by a third-party service provider. This object is available in API version 55.0 and later.

## AISentimentResult

Represents the outcome of the sentiment analysis performed on a text field of a Salesforce object by a third-party service provider. 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	<b>Type</b> dateTime  <b>Properties</b> Filter, Nillable, Sort  <b>Description</b> The date when the AI Sentiment Result was last referenced.
LastViewedDate	<b>Type</b> dateTime

Field	Details
	<b>Properties</b> Filter, Nillable, Sort <b>Description</b> The date when the AI Sentiment Result was last viewed.
MixedConfidenceScore	<b>Type</b> double <b>Properties</b> Filter, Nillable, Sort <b>Description</b> The mixed confidence score from the result of the sentiment analysis.
Name	<b>Type</b> string <b>Properties</b> Create, Filter, Group, idLookup, Sort, Update <b>Description</b> The name of the AI Sentiment Result record.
NegativeConfidenceScore	<b>Type</b> double <b>Properties</b> Filter, Nillable, Sort <b>Description</b> The negative confidence score from the result of the sentiment analysis.
NeutralConfidenceScore	<b>Type</b> double <b>Properties</b> Filter, Nillable, Sort <b>Description</b> The neutral confidence score from the result of the sentiment analysis.
OverallSentimentScore	<b>Type</b> double <b>Properties</b> Filter, Nillable, Sort <b>Description</b> The overall score of the sentiment analysis.
OverallSentimentType	<b>Type</b> picklist

Field	Details
	<p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> The result of the sentiment analysis. Possible values are:</p> <ul style="list-style-type: none"> <li>• Mixed</li> <li>• Negative</li> <li>• Neutral</li> <li>• Positive</li> </ul>
OwnerId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> The owner ID of the AI Sentiment Result record. This field is a polymorphic relationship field.</p> <p><b>Relationship Name</b> Owner</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> Group, User</p>
PositiveConfidenceScore	<p><b>Type</b> double</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The positive confidence score from the result of the sentiment analysis.</p>
Response	<p><b>Type</b> textarea</p> <p><b>Properties</b> Nillable</p> <p><b>Description</b> The score of the sentiment analysis stored in JSON format.</p>
ServiceType	<p><b>Type</b> picklist</p>

Field	Details
	<p><b>Properties</b> Create, Filter, Group, Restricted picklist, Sort</p> <p><b>Description</b> The third-party service name that performs the sentiment analysis. Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>AWS_Comprehend_DetectSentiment</code></li> </ul>
SourceObjectId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort</p> <p><b>Description</b> The standard or custom object containing the text field that's processed for sentiment analysis. This field is a polymorphic relationship field.</p> <p><b>Relationship Name</b> SourceObject</p> <p><b>Relationship Type</b> Lookup</p>
SourceObjectType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> The name of the standard or custom object with the record containing the text field that's processed for sentiment analysis. Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>SurveyQuestionResponse</code></li> </ul>
SourceTextField	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Restricted picklist, Sort</p> <p><b>Description</b> The name of the text field that's processed for sentiment analysis. Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>SurveyQuestionResponse.ChoiceValue</code></li> <li>• <code>SurveyQuestionResponse.ResponseValue</code></li> </ul>

Field	Details
SourceTextLanguage	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Restricted picklist, Sort</p> <p><b>Description</b> The language of the text that's processed for sentiment analysis.</p>
Status	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> The status of the sentiment analysis. Possible values are:</p> <ul style="list-style-type: none"> <li>• Completed</li> <li>• Draft</li> <li>• Failed</li> <li>• Rejected</li> <li>• Submitted</li> </ul> <p>The default value is <code>Draft</code>.</p>

## Associated Object

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

### [AISentimentResultShare](#) on page 1606

Sharing is available for the object.

## Service Process Studio

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.

### [Apex Reference](#)

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

### [Service Process Studio Invocable Actions](#)

Use actions to invoke Service Process Studio actions in a flow.

### [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.

### [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.

## 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
<code>active</code>	<b>Field Type</b> boolean

Field Name	Description
	<b>Description</b> Specifies whether this Integration Definition is active. The default is <code>false</code> .
<code>apexClass</code>	<b>Field Type</b> string <b>Description</b> The custom Apex class that the related Industries: Send Apex Async Request invocable action invokes. Specify either <code>apexClass</code> or <code>fileBasedApexClass</code> but not both. Applies only if the type is <code>Apex</code> .
<code>description</code>	<b>Field Type</b> string <b>Description</b> A meaningful explanation of the Integration Definition.
<code>developerName</code>	<b>Field Type</b> string <b>Description</b> Required. A system name for the Integration Definition.
<code>externalServiceOperationName</code>	<b>Field Type</b> string <b>Description</b> The external service operation that the related Industries: Send External Async Request invocable action invokes. Applies only if the type is <code>LowCode</code> .
<code>externalServiceRegistration</code>	<b>Field Type</b> string <b>Description</b> The external service that the related Industries: Send External Async Request invocable action invokes. Applies only if the type is <code>LowCode</code> .
<code>fileBasedApexClass</code>	<b>Field Type</b> string <b>Description</b> The Salesforce-provided Apex class that the related Industries: Send Apex Async Request invocable action invokes. Specify either <code>apexClass</code> or <code>fileBasedApexClass</code> but not both. Applies only if the type is <code>Apex</code> .
<code>inputDataProcessor</code>	<b>Field Type</b> string

Field Name	Description
	<b>Description</b> The optional Integration Procedure that processes the sent data. Applies only if the type is <code>LowCode</code> .
<code>integrationProviderAttributes</code>	<b>Field Type</b> <a href="#">IntegrationProviderAttr[]</a> <b>Description</b> Custom attributes that store data associated with an Integration Definition.
<code>outputDataProcessor</code>	<b>Field Type</b> string <b>Description</b> The optional Integration Procedure that processes the returned data. Applies only if the type is <code>LowCode</code> .
<code>providerLabel</code>	<b>Field Type</b> string <b>Description</b> Required. A meaningful name for the Integration Definition.
<code>type</code>	<b>Field Type</b> DefinitionType (enumeration of type string) <b>Description</b> Required. What the Integration Definition calls, either an Apex class or an external service. Values are: <ul style="list-style-type: none"> <li>• Apex</li> <li>• LowCode</li> </ul>

## IntegrationProviderAttr

A custom attribute that stores data associated with an Integration Definition.

Field Name	Description
<code>dataType</code>	<b>Field Type</b> AttrDataType (enumeration of type string) <b>Description</b> Required.

Field Name	Description
	<p>The data type of the attribute.</p> <p>Values are:</p> <ul style="list-style-type: none"> <li>• Date</li> <li>• DateTime</li> <li>• Double</li> <li>• Integer</li> <li>• Percentage</li> <li>• String</li> <li>• Boolean</li> </ul>
dateTimeValue	<p><b>Field Type</b> dateTime</p> <p><b>Description</b> The value of the attribute if the <code>dataType</code> is DateTime.</p>
dateValue	<p><b>Field Type</b> date</p> <p><b>Description</b> The value of the attribute if the <code>dataType</code> is Date.</p>
description	<p><b>Field Type</b> string</p> <p><b>Description</b> A meaningful explanation of the attribute.</p>
developerName	<p><b>Field Type</b> string</p> <p><b>Description</b> Required. A system name for the attribute.</p>
doubleValue	<p><b>Field Type</b> double</p> <p><b>Description</b> The value of the attribute if the <code>dataType</code> is Double.</p>
integerValue	<p><b>Field Type</b> int</p> <p><b>Description</b> The value of the attribute if the <code>dataType</code> is Integer.</p>

Field Name	Description
label	<b>Field Type</b> string <b>Description</b> Required. A meaningful name for the attribute.
percentageValue	<b>Field Type</b> double <b>Description</b> The value of the attribute if the <code>dataType</code> is Percentage.
required	<b>Field Type</b> boolean <b>Description</b> Required. Specifies whether the attribute is required.
stringValue	<b>Field Type</b> string <b>Description</b> The value of the attribute if the <code>dataType</code> is String.
trueOrFalseValue	<b>Field Type</b> boolean <b>Description</b> The value of the attribute if the <code>dataType</code> 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>
```

```
</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	<div>Field Type</div> <div>string</div> <div>Description</div> <div>A meaningful explanation of the service process.</div>

Field Name	Description
processLabel	<b>Field Type</b> string <b>Description</b> Required. A meaningful name for the service process.
serviceProcessAttributes	<b>Field Type</b> <a href="#">ServiceProcessAttribute[]</a> <b>Description</b> Custom attributes that store the data associated with the service process.
serviceProcessDependencies	<b>Field Type</b> <a href="#">ServiceProcessDependency[]</a> <b>Description</b> Dependent components of the service process, such as OmniScripts or flows.
serviceProcessItemGroups	<b>Field Type</b> <a href="#">ServiceProcessItemGroup[]</a> <b>Description</b> Groups of related ServiceProcessAttribute records.
shortDescription	<b>Field Type</b> string <b>Description</b> A brief meaningful explanation of the service process.
usageType	<b>Field Type</b> SvcCatalogItemUsageType (enumeration of type string) <b>Description</b> Required. The Cloud that uses this service process. Values are: <ul style="list-style-type: none"><li>• CustomerService</li><li>• Employee</li><li>• FinancialServices</li><li>• Industry (available in version 58.0 and later)</li></ul>

## 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	<p><b>Field Type</b> SvcCtlgltemAttrAttributeType (enumeration of type string)</p> <p><b>Description</b> A <code>Base</code> attribute corresponds to a <code>SvcCatalogRequest</code> field, which is subject to field-level security. An <code>Extended</code> attribute is only a <code>ServiceProcessAttribute</code> object record, which isn't subject to field-level security.</p> <p>Values are:</p> <ul style="list-style-type: none"> <li>• <code>Base</code></li> <li>• <code>Extended</code></li> </ul> <p>The default is <code>Extended</code>.</p>
dataType	<p><b>Field Type</b> SvcCatalogItemAttrDataType (enumeration of type string)</p> <p><b>Description</b> The data type of the attribute.</p> <p>Values are:</p> <ul style="list-style-type: none"> <li>• <code>Checkbox</code></li> <li>• <code>Currency</code></li> <li>• <code>Date</code></li> <li>• <code>Datetime</code></li> <li>• <code>Integer</code></li> <li>• <code>ListOfBoolean</code></li> <li>• <code>ListOfDouble</code></li> <li>• <code>ListOfInteger</code></li> <li>• <code>ListOfMaps</code></li> <li>• <code>ListOfString</code></li> <li>• <code>Map</code></li> <li>• <code>Number</code></li> <li>• <code>Percentage</code></li> <li>• <code>Text</code></li> </ul> <p>The default is <code>Text</code>.</p> <p> <b>Note:</b> Selecting <code>Currency</code> doesn't cause an error, but currency conversions aren't supported.</p>

Field Name	Description
<code>description</code>	<b>Field Type</b> string <b>Description</b> A meaningful explanation of the attribute.
<code>developerName</code>	<b>Field Type</b> string <b>Description</b> Required. A system name for the attribute.
<code>fieldIdentifier</code>	<b>Field Type</b> string <b>Description</b> For a <code>Base</code> attribute, the Developer Name of the <code>SvcCatalogRequest</code> field. This field can be standard or custom.
<code>groupApiName</code>	<b>Field Type</b> string <b>Description</b> The <code>apiName</code> of the <code>ServiceProcessItemGroup</code> to which this attribute belongs.
<code>inputVariableValue</code>	<b>Field Type</b> string <b>Description</b> The default value of the attribute.
<code>isRequired</code>	<b>Field Type</b> boolean <b>Description</b> Specifies whether the attribute is required. The default is <code>false</code> .
<code>label</code>	<b>Field Type</b> string <b>Description</b> Required. A meaningful name for the attribute.
<code>parentAttribute</code>	<b>Field Type</b> string

Field Name	Description
	<b>Description</b> The parent attribute of this attribute. For example, a Latitude attribute can have GeoLocation as a parent.
sortOrder	<b>Field Type</b> int  <b>Description</b> 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	<b>Field Type</b> string  <b>Description</b> Required.  The Developer Name of the flow, OmniScript, Integration Definition, or preprocessor Apex class.
type	<b>Field Type</b> SvcCatalogItemDependencyType (enumeration of type string)  <b>Description</b> Required. The type of dependent component. Values are: <ul style="list-style-type: none"> <li>• FlowDefinition</li> <li>• IntegrationProviderDef</li> <li>• OmniScriptConfig</li> <li>• PreprocessorApexClass</li> </ul>

## ServiceProcessItemGroup

A group of related ServiceProcessAttribute records.

Field Name	Description
apiName	<b>Field Type</b> string <b>Description</b> Required. The API Name of the group.
groupName	<b>Field Type</b> string <b>Description</b> Required. The name of the group.
sortOrder	<b>Field Type</b> int <b>Description</b> 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 `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

Name	Type	Description	Required or Optional	Available Version
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, <a href="#">ConnectApi.GenericObject</a> >	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, <a href="#">ConnectApi.GenericObject</a> >	Field name-value pairs for the Case object.	Optional	57.0
documentInfo	List< <a href="#">ConnectApi.documentInfoAttributes</a> >	List of documents.	Optional	57.0
svcCatalogItemDefApiName	String	API Name of the related Service Catalog Item Definition. See <a href="#">SvcCatalogItemDef</a> .	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	<a href="#">Object</a>	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	<a href="#">Map&lt;String, ConnectApi.GenericObjectOutput&gt;</a>	Attributes defined by Service Catalog Item Attribute records, which are part of the related Service Catalog Item Definition. See <a href="#">SvcCatalogItemDef</a> .	57.0

**ConnectApi.ServiceProcessRecordRepresentation**

Service process record output.

Property Name	Type	Description	Available Version
attributes	<a href="#">ConnectApi.ServiceCatalogItemAttributes</a>	Attributes defined by Service Catalog Item Attribute records, which are part of the related Service Catalog Item Definition. For the property details, see <a href="#">ServiceCatalogItemAttribute</a> in <a href="#">SvcCatalogItemDef</a> .	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 <a href="#">SvcCatalogRequest</a> .	57.0

**ConnectApi.ServiceProcessRepresentation**

Output for creating a service process.

Property Name	Type	Description	Available Version
caseId	String	Case ID.	57.0

Property Name	Type	Description	Available Version
caseNumber	String	Case number.	57.0
caseStatus	String	Case status.	57.0
svcCatalog RequestId	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.

### [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.

## 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.

## 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 createdAtObj = new ConnectApi.GenericObject();
createdAtObj.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', createdAtObj);
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
	<p>Description: A unique identifier for the request. The value can be any string.</p> <p>In the Integration Definition in Setup, setting the RequestGuid to this value is recommended:</p> <pre>{ !\$Flow.InterviewGuid }</pre> <p>This creates an automatically generated ID based on the flow that calls the action.</p>
IntegrationDefinitionDevName	<p>Type: String</p> <p>Description: The Developer Name of the Integration Definition in Setup that specifies the Apex class to call.</p>
ContextRecordId	<p>Type: String</p> <p>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.</p>

### 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: <code>{ !\$Flow.InterviewGuid }</code> 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": "1d926919bc721ceealbde0918184795922c0-7f5f",
  "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, <a href="#">Generic Object</a> >	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, <a href="#">Generic Object</a> >	Field name-value pairs for the Case object.	Optional	57.0
documentInfo	<a href="#">Document Info Attributes</a> []	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, <a href="#">Generic Object</a> >	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

Name	Type	Description	Required or Optional	Available Version
caseInfo	Map<String, <a href="#">Generic Object</a> >	Field name-value pairs for the Case object.	Optional	57.0
documentInfo	<a href="#">Document Info Attributes</a> []	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
<a href="#">Service Process Request Data</a>	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, <a href="#">Generic Object</a> >	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, <a href="#">Generic Object</a> >	Field name-value pairs for the Case object.	Optional	57.0
documentInfo	<a href="#">Document Info Attributes</a> []	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, <a href="#">Generic Object Output</a> >	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
svcCatalogRequestId	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	<a href="#">Service Catalog Item Attributes</a>	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	<a href="#">Service Catalog Item Group[]</a>	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 1556 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.

## Timeline

---

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.

### [Timeline Standard Object](#)

Use the standard object to translate timeline labels.

### [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](#).

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	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Restricted picklist, Sort</p> <p><b>Description</b> The language of the translated label. Possible values are:</p> <ul style="list-style-type: none"> <li>af—Afrikaans</li> <li>am—Amharic</li> <li>ar—Arabic</li> <li>ar_AE—Arabic (United Arab Emirates)</li> <li>ar_BH—Arabic (Bahrain)</li> <li>ar_DZ—Arabic (Algeria)</li> <li>ar_EG—Arabic (Egypt)</li> <li>ar_IQ—Arabic (Iraq)</li> <li>ar_JO—Arabic (Jordan)</li> <li>ar_KW—Arabic (Kuwait)</li> <li>ar_LB—Arabic (Lebanon)</li> <li>ar_LY—Arabic (Libya)</li> <li>ar_MA—Arabic (Morocco)</li> <li>ar_OM—Arabic (Oman)</li> <li>ar_QA—Arabic (Qatar)</li> <li>ar_SA—Arabic (Saudi Arabia)</li> <li>ar_SD—Arabic (Sudan)</li> <li>ar_SY—Arabic (Syria)</li> <li>ar_TN—Arabic (Tunisia)</li> <li>ar_YE—Arabic (Yemen)</li> <li>bg—Bulgarian</li> <li>bn—Bengali</li> <li>bs—Bosnian</li> <li>ca—Catalan</li> <li>cac—Chuj</li> <li>caK—Kaqchikel</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>• cs—Czech</li> <li>• cy—Welsh</li> <li>• da—Danish</li> <li>• de—German</li> <li>• de_AT—German (Austria)</li> <li>• de_BE—German (Belgium)</li> <li>• de_CH—German (Switzerland)</li> <li>• de_LU—German (Luxembourg)</li> <li>• el—Greek</li> <li>• el_CY—Greek (Cyprus)</li> <li>• en_AE—English (United Arab Emirates)</li> <li>• en_AU—English (Australian)</li> <li>• en_BE—English (Belgium)</li> <li>• en_CA—English (Canadian)</li> <li>• en_CY—English (Cyprus)</li> <li>• en_DE—English (Germany)</li> <li>• en_GB—English (UK)</li> <li>• en_HK—English (Hong Kong)</li> <li>• en_IE—English (Ireland)</li> <li>• en_IL—English (Israel)</li> <li>• en_IN—English (Indian)</li> <li>• en_IT—English (Italy)</li> <li>• en_MT—English (Malta)</li> <li>• en_MY—English (Malaysian)</li> <li>• en_NL—English (Netherlands)</li> <li>• en_NZ—English (New Zealand)</li> <li>• en_PH—English (Phillipines)</li> <li>• en_SG—English (Singapore)</li> <li>• en_US—English</li> <li>• en_ZA—English (South Africa)</li> <li>• eo—Esperanto (Pseudo)</li> <li>• es—Spanish</li> <li>• es_AR—Spanish (Argentina)</li> <li>• es_BO—Spanish (Bolivia)</li> <li>• es_CL—Spanish (Chile)</li> <li>• es_CO—Spanish (Colombia)</li> <li>• es_CR—Spanish (Costa Rica)</li> <li>• es_DO—Spanish (Dominican Republic)</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>• es_EC—Spanish (Ecuador)</li> <li>• es_GT—Spanish (Guatemala)</li> <li>• es_HN—Spanish (Honduras)</li> <li>• es_MX—Spanish (Mexico)</li> <li>• es_NI—Spanish (Nicaragua)</li> <li>• es_PA—Spanish (Panama)</li> <li>• es_PE—Spanish (Peru)</li> <li>• es_PR—Spanish (Puerto Rico)</li> <li>• es_PY—Spanish (Paraguay)</li> <li>• es_SV—Spanish (El Salvador)</li> <li>• es_US—Spanish (United States)</li> <li>• es_UY—Spanish (Uruguay)</li> <li>• es_VE—Spanish (Venezuela)</li> <li>• et—Estonian</li> <li>• eu—Basque</li> <li>• fa—Farsi</li> <li>• fi—Finnish</li> <li>• fr—French</li> <li>• fr_BE—French (Belgium)</li> <li>• fr_CA—French (Canadian)</li> <li>• fr_CH—French (Switzerland)</li> <li>• fr_LU—French (Luxembourg)</li> <li>• fr_MA—French (Morocco)</li> <li>• ga—Irish</li> <li>• gu—Gujarati</li> <li>• haw—Hawaiian</li> <li>• hi—Hindi</li> <li>• hmn—Hmong</li> <li>• hr—Croatian</li> <li>• ht—Haitian Creole</li> <li>• hu—Hungarian</li> <li>• hy—Armenian</li> <li>• in—Indonesian</li> <li>• is—Icelandic</li> <li>• it—Italian</li> <li>• it_CH—Italian (Switzerland)</li> <li>• iw—Hebrew</li> <li>• iw_EO—Esperanto RTL (Pseudo)</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>• ja—Japanese</li> <li>• ji—Yiddish</li> <li>• ka—Georgian</li> <li>• kk—Kazakh</li> <li>• kl—Greenlandic</li> <li>• km—Khmer</li> <li>• kn—Kannada</li> <li>• ko—Korean</li> <li>• lb—Luxembourgish</li> <li>• lt—Lithuanian</li> <li>• lv—Latvian</li> <li>• mi—Te reo</li> <li>• mk—Macedonian</li> <li>• ml—Malayalam</li> <li>• mr—Marathi</li> <li>• ms—Malay</li> <li>• mt—Maltese</li> <li>• my—Burmese</li> <li>• nl_BE—Dutch (Belgium)</li> <li>• nl_NL—Dutch</li> <li>• no—Norwegian</li> <li>• pa—Punjabi</li> <li>• pl—Polish</li> <li>• pt_BR—Portuguese (Brazil)</li> <li>• pt_PT—Portuguese (European)</li> <li>• quc—Kiche</li> <li>• rm—Romansh</li> <li>• ro—Romanian</li> <li>• ro_MD—Romanian (Moldova)</li> <li>• ru—Russian</li> <li>• ru_AM—Russian (Armenia)</li> <li>• ru_BY—Russian (Belarus)</li> <li>• ru_KG—Russian (Kyrgyzstan)</li> <li>• ru_KZ—Russian (Kazakhstan)</li> <li>• ru_LT—Russian (Lithuania)</li> <li>• ru_MD—Russian (Moldova)</li> <li>• ru_PL—Russian (Poland)</li> <li>• ru_UA—Russian (Ukraine)</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>• sh—Serbian (Latin)</li> <li>• sh_ME—Montenegrin</li> <li>• sk—Slovak</li> <li>• sl—Slovene</li> <li>• sm—Samoan</li> <li>• sq—Albanian</li> <li>• sr—Serbian (Cyrillic)</li> <li>• sv—Swedish</li> <li>• sw—Swahili</li> <li>• ta—Tamil</li> <li>• te—Telugu</li> <li>• th—Thai</li> <li>• tl—Tagalog</li> <li>• tr—Turkish</li> <li>• uk—Ukrainian</li> <li>• ur—Urdu</li> <li>• vi—Vietnamese</li> <li>• xh—Xhosa</li> <li>• zh_CN—Chinese (Simplified)</li> <li>• zh_HK—Chinese (Hong Kong)</li> <li>• zh_MY—Chinese (Malaysia)</li> <li>• zh_SG—Chinese (Singapore)</li> <li>• zh_TW—Chinese (Traditional)</li> <li>• zu—Zulu</li> </ul>
NamespacePrefix	<p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Filter, Group, Nillable, Sort</p> <p><b>Description</b></p> <p>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 <code>namespacePrefix__componentName</code> notation.</p> <p>The namespace prefix can have one of the following values.</p> <ul style="list-style-type: none"> <li>• 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.</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>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.</li> </ul>
ParentId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> The ID of the related timeline configuration. This field is a relationship field. This field is a relationship field.</p> <p><b>Relationship Name</b> Parent</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> TimelineObjectDefinition</p>
Value	<p><b>Type</b> textarea</p> <p><b>Properties</b> Create, Filter, Sort, Update</p> <p><b>Description</b> The translated master label of the timeline configuration.</p>

## 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()`, `describeObjects()`, `query()`, `retrieve()`, `update()`, `upsert()`

## Supported REST API Methods

DELETE, GET, HEAD, PATCH, POST, Query

## Fields

Field	Details
BaseObject	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Restricted picklist, Sort</p> <p><b>Description</b> 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.</p>
Definition	<p><b>Type</b> textarea</p> <p><b>Properties</b> Create, Update</p> <p><b>Description</b> The timeline definition stored in JSON format.</p>
DeveloperName	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> The developer name of the timeline.</p>
FullName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Group, Nillable</p> <p><b>Description</b></p>
IsActive	<p><b>Type</b> boolean</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Sort</p> <p><b>Description</b> Indicates whether the timeline is active. The default value is <code>false</code>.</p>

Field	Details
Language	<p><b>Type</b> picklist</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> The language of the timeline object definition. Possible values are:</p> <ul style="list-style-type: none"> <li>• da—Danish</li> <li>• de—German</li> <li>• en_US—English</li> <li>• es—Spanish</li> <li>• es_MX—Spanish (Mexico)</li> <li>• fi—Finnish</li> <li>• fr—French</li> <li>• it—Italian</li> <li>• ja—Japanese</li> <li>• ko—Korean</li> <li>• nl_NL—Dutch</li> <li>• no—Norwegian</li> <li>• pt_BR—Portuguese (Brazil)</li> <li>• ru—Russian</li> <li>• sv—Swedish</li> <li>• th—Thai</li> <li>• zh_CN—Chinese (Simplified)</li> <li>• zh_TW—Chinese (Traditional)</li> </ul>
ManageableState	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Possible values are:</p> <ul style="list-style-type: none"> <li>• beta—Managed-Beta</li> <li>• deleted—Managed-Proposed-Deleted</li> <li>• deprecated—Managed-Proposed-Deprecated</li> <li>• deprecatedEditable—SecondGen-Installed-Deprecated</li> <li>• installed—Managed-Installed</li> <li>• installedEditable—SecondGen-Installed-Editable</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>released—Managed-Released</li> <li>unmanaged—Unmanaged</li> </ul>
MasterLabel	<p><b>Type</b> ManageableState enumerated list</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Indicates the manageable state of the specified component that is contained in a package:</p> <ul style="list-style-type: none"> <li>beta</li> <li>deleted</li> <li>deprecated</li> <li>deprecatedEditable</li> <li>installed</li> <li>installedEditable</li> <li>released</li> <li>unmanaged</li> </ul>
Metadata	<p><b>Type</b> TimelineObjectDefinition</p> <p><b>Properties</b> Create, Nillable, Update</p> <p><b>Description</b> The timeline object definition's metadata.</p>
NamespacePrefix	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> 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 <b><i>namespacePrefix__componentName</i></b> notation.</p> <p>The namespace prefix can have one of the following values:</p> <ul style="list-style-type: none"> <li>In Developer Edition organizations, the namespace prefix is set to the namespace prefix of the organization for all objects that support it. There is an exception if an object is in an installed managed package. In that case, the object has the namespace prefix of the installed managed package. This field's value is the namespace prefix of the Developer Edition organization of the package developer.</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>In organizations that are not Developer Edition organizations, <code>NamespacePrefix</code> is only set for objects that are part of an installed managed package. There is no namespace prefix for all other objects.</li> </ul>

## Associated Objects

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

### [TimelineObjectDefinitionChangeEvent](#) (API version 60.0)

Change events are available for the object.

## Virtual Calls

Virtual calls enable communication from anywhere by using video calls to connect customer service agents to their customers.

### [Virtual Calls Standard Objects](#)

Use these standard objects to configure virtual calls.

## Virtual Calls Standard Objects

Use these standard objects to configure virtual calls.

### [ServiceProviderEvent](#)

Represents events generated by third-party service providers as platform events. This object is available in API version 55.0 and later.

### [VirtualVisitConfig](#)

Represents the configuration of an external video provider. This object is available in API version 54.0 and later.

## ServiceProviderEvent

Represents events generated by third-party service providers as platform events. This object is available in API version 55.0 and later.

## Supported Calls

`create()`, `describeSObjects()`

## Fields

Field	Details
EventUuid	<b>Type</b> string

Field	Details
	<b>Properties</b> Nillable <b>Description</b> A universally unique identifier (UUID) that identifies a platform event message.
Json	<b>Type</b> textarea <b>Properties</b> Create, Nillable <b>Description</b> The event data in JSON format.
ReplayId	<b>Type</b> string <b>Properties</b> Nillable <b>Description</b> The position of the event in the event system.
ServiceName	<b>Type</b> string <b>Properties</b> Create, Nillable <b>Description</b> The name of the third-party service that generates the event.

## VirtualVisitConfig

Represents the configuration of an external video provider. This object is available in API version 54.0 and later.

### Supported Calls

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

### Fields

Field	Details
ComprehendServiceType	<b>Type</b> picklist <b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update

Field	Details
	<p><b>Description</b></p> <p>The name of the external service that's going to be used to analyze the transcribed logs and get insights.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>ComprehendMedicalService</code> —Transcribe Medical</li> <li>• <code>ComprehendService</code> —Transcribe</li> </ul>
DeveloperName	<p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Sort, Update</p> <p><b>Description</b></p> <p>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.</p>
ExperienceCloudSiteUrl	<p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b></p> <p>The URL of the Experience Cloud site where the Video Call component is available to portal or guest users.</p>
ExternalRoleIdentifier	<p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b></p> <p>The ID of the role that's used to allow users to join a video call and to grant them temporary access to certain functions needed to participate in the call.</p> <p>Available in API version 56.0 and later.</p>
Language	<p><b>Type</b></p> <p>picklist</p> <p><b>Properties</b></p> <p>Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b></p> <p>The language in which translation of record labels is supported.</p>

Field	Details
	<p>Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>da</code> —Danish</li> <li>• <code>de</code> —German</li> <li>• <code>en_US</code> —English</li> <li>• <code>es</code> —Spanish</li> <li>• <code>es_MX</code> —Spanish (Mexico)</li> <li>• <code>fi</code> —Finnish</li> <li>• <code>fr</code> —French</li> <li>• <code>it</code> —Italian</li> <li>• <code>ja</code> —Japanese</li> <li>• <code>ko</code> —Korean</li> <li>• <code>nl_NL</code> —Dutch</li> <li>• <code>no</code> —Norwegian</li> <li>• <code>pt_BR</code> —Portuguese (Brazil)</li> <li>• <code>ru</code> —Russian</li> <li>• <code>sv</code> —Swedish</li> <li>• <code>th</code> —Thai</li> <li>• <code>zh_CN</code> —Chinese (Simplified)</li> <li>• <code>zh_TW</code> —Chinese (Traditional)</li> </ul>
MasterLabel	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> A user-friendly name for the VirtualVisitConfig.</p>
MessagingRegion	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Specifies the region in which the waiting room and messaging channel data are processed and stored. Available in version 57.0 and later.</p>
NamedCredentialId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p><b>Description</b></p> <p>The named credential record that's used to authenticate and authorize an account of the video call vendor.</p> <p>This field is a relationship field.</p> <p><b>Relationship Name</b></p> <p>NamedCredential</p> <p><b>Relationship Type</b></p> <p>Lookup</p> <p><b>Refers To</b></p> <p>NamedCredential</p>
NamespacePrefix	<p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Filter, Group, Nillable, Sort</p> <p><b>Description</b></p> <p>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 <code>namespacePrefix__componentName</code> notation.</p> <p>The namespace prefix can have one of the following values:</p> <ul style="list-style-type: none"> <li>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.</li> <li>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.</li> </ul>
StorageBucketName	<p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b></p> <p>The name of the storage bucket that stores the meeting transcript.</p>
UsageType	<p><b>Type</b></p> <p>picklist</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p>

Field	Details
	<p><b>Description</b></p> <p>The name of the Salesforce feature for which the video call configuration record is created. This field is unique within your organization.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• CHIME —Chime</li> <li>• ENTITY_DETECTION —Entity Detection</li> <li>• INTELLIGENT_FORM_READER —Intelligent Form Reader</li> <li>• KEY_PHRASE_EXTRACTION —Key Phrase Extraction</li> <li>• SENTIMENT_ANALYSIS —Sentiment Analysis</li> </ul>
VideoCallApptTypeValue	<p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b></p> <p>The Default Appointment Type picklist values from the Service Appointment object that represent a video appointment type. Use semicolons to separate multiple values.</p> <p>Available in API version 55.0 and later.</p>
VideoControlRegion	<p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b></p> <p>Specifies the region through which API calls related to Video Calls are made.</p> <p>Available in API version 57.0 and later.</p>
VisitRegion	<p><b>Type</b></p> <p>picklist</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b></p> <p>The region where the Video Call video and audio data are processed.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• af-south-1 —Africa (Cape Town)</li> <li>• ap-east-1 —Asia Pacific (Hong Kong)</li> <li>• ap-northeast-1 —Asia Pacific (Tokyo)</li> <li>• ap-northeast-2 —Asia Pacific (Seoul)</li> <li>• ap-northeast-3 —Asia Pacific (Osaka)</li> <li>• ap-south-1 —Asia Pacific (Mumbai)</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>• <code>ap-southeast-1</code> —Asia Pacific (Singapore)</li> <li>• <code>ap-southeast-2</code> —Asia Pacific (Sydney)</li> <li>• <code>ca-central-1</code> —Canada (Central)</li> <li>• <code>eu-central-1</code> —Europe (Frankfurt)</li> <li>• <code>eu-north-1</code> —Europe (Stockholm)</li> <li>• <code>eu-south-1</code> —Europe (Milan)</li> <li>• <code>eu-west-1</code> —Europe (Ireland)</li> <li>• <code>eu-west-2</code> —Europe (London)</li> <li>• <code>eu-west-3</code> —Europe (Paris)</li> <li>• <code>me-south-1</code> —Middle East (Bahrain)</li> <li>• <code>sa-east-1</code> —South America (São Paulo)</li> <li>• <code>us-east-1</code> —US East (N. Virginia)</li> <li>• <code>us-east-2</code> —US East (Ohio)</li> <li>• <code>us-west-1</code> —US West (N. California)</li> <li>• <code>us-west-2</code> —US West (Oregon)</li> </ul>

## Associated Objects

This section provides a list of objects associated to Industries standard objects and 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.

### [StandardObjectNameChangeEvent](#)

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.

### [StandardObjectNameFeed](#)

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

### [StandardObjectNameHistory](#)

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

### [StandardObjectNameOwnerSharingRule](#)

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

[StandardObjectNameShare](#)

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

## *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.

- [AccountAccountRelation](#) on page 995
- [AccountContactRelation](#) on page 999
- [AirTravelEmssnFctr](#)

- [AirTravelEnrgyUse](#)
- [AssessmentIndicatorDefinition](#)
- [AssetAccountParticipant](#)
- [AssetContactParticipant](#)
- [AssetMilestone](#)
- [BldgEnrgyIntensity](#)
- [BldgEnrgyIntensityCnfg](#)
- [BldgEnrgyIntensityVal](#)
- [BldgSizeCategory](#)
- [ContactContactRelation](#) on page 1002
- [CrbnEmssnScopeAlloc](#)
- [CrbnEmssnScopeAllocVal](#)
- [ElectricityEmssnFctrSet](#)
- [FrgtHaulingEmssnFctr](#)
- [FrgtHaulingEnrgyUse](#)
- [GeneratedWaste](#)
- [GenericVisitTask](#)
- [GenericVisitTaskContext](#)
- [GnrcVstKeyPerformanceInd](#)
- [GnrcVstTaskContextRelation](#)
- [GroundTravelEmssnFctr](#)
- [GroundTravelEnrgyUse](#)
- [HotelStayEmssnFctr](#)
- [HotelStayEnrgyUse](#)
- [InflationRate](#)
- [LeadLineItem](#)
- [LeadPreferredSeller](#)
- [OpportunityPreferredSeller](#)
- [OtherEmssnFctrSet](#)
- [OtherEmssnFctrSetItem](#)
- [PartyRelationshipGroup](#) on page 1006
- [PartyRoleRelation](#) on page 1011
- [PcmtEmssnFctrSet](#)
- [PcmtEmssnFctrSetItem](#)
- [RecordAlert](#)
- [RefrigerantEmssnFctr](#)
- [RentalCarEmssnFctr](#)
- [RentalCarEnrgyUse](#)
- [Scope3CrbnFtpmnt](#)
- [Scope3EmssnSrc](#)

- [Scope3PcmtItem](#)
- [Scope3PcmtSummary](#)
- [StnryAssetCrbnFtprnt](#)
- [StnryAssetCrbnFtprntltm](#)
- [StnryAssetEnrgyUse](#)
- [StnryAssetEnvrSrc](#)
- [RebateClaim](#)
- [VehicleAssetCrbnFtprnt](#)
- [VehicleAssetEmssnSrc](#)
- [VehicleAssetEnrgyUse](#)
- [WasteFootprint](#)
- [WasteFootprintItem](#)
- [WstDispoEmssnFctrSet](#)
- [WstDispoEmssnFctrSetltm](#)
- [StnryAssetEnrgyUseCnfg](#)
- [VehAssetEnrgyUseCnfg](#)
- Mortgage loan applicant and application objects. See [Mortgage Lending Objects Supported by Out-of-the-Box Components and Pages in Experience Builder Templates](#) in the *Financial Services Cloud Administrator Guide*.
- [Vehicle](#)
- [VehicleDefinition](#)
- [Visit](#)

## StandardObjectNameFeed

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

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

## Supported Calls

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

## Special Access Rules

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

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

- [Modify All Data](#)
- [Modify All 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	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The ID of the comment marked as best answer on a question post.</p>
Body	<p><b>Type</b> textarea</p> <p><b>Properties</b> Nillable, Sort</p> <p><b>Description</b> The body of the post. Required when <b>Type</b> is <b>TextPost</b>. Optional when <b>Type</b> is <b>ContentPost</b> or <b>LinkPost</b>.</p>
CommentCount	<p><b>Type</b> int</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> The number of comments associated with this feed item.</p>
ConnectionId	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> When a PartnerNetworkConnection modifies a record that is tracked, the <b>CreatedBy</b> field contains the ID of the system administrator. The <b>ConnectionId</b> contains the ID of the PartnerNetworkConnection. Available if Salesforce to Salesforce is enabled for your organization.</p>

Field	Details
InsertedById	<div>Type reference</div> <div>Properties Group, Nillable, Sort</div> <div>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.</div>
isRichText	<div>Type boolean</div> <div>Properties Defaulted on create, Filter, Group, Sort</div> <div>Description <p>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.</p><p>Rich text supports the following HTML tags:</p><ul style="list-style-type: none"><li>&lt;p&gt;</li><li> Tip: Though the &lt;br&gt; tag isn't supported, you can use &lt;p&gt;&amp;nbsp;&lt;/p&gt; to create lines.</li><li>&lt;a&gt;</li><li>&lt;b&gt;</li><li>&lt;code&gt;</li><li>&lt;i&gt;</li><li>&lt;u&gt;</li><li>&lt;s&gt;</li><li>&lt;ul&gt;</li><li>&lt;ol&gt;</li><li>&lt;li&gt;</li><li>&lt;img&gt;</li></ul><p>The &lt;img&gt; tag is accessible only through the API and must reference files in Salesforce similar to this example: &lt;img src="/sfdc://069B0000000omjh"/&gt;&lt;/img&gt;</p><div>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.</div></div>
LikeCount	<div>Type int</div>

Field	Details
	<p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> The number of likes associated with this feed item.</p>
LinkUrl	<p><b>Type</b> url</p> <p><b>Properties</b> Nillable, Sort</p> <p><b>Description</b> The URL of a <code>LinkPost</code>.</p>
NetworkScope	<p><b>Type</b> picklist</p> <p><b>Properties</b> Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> 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.</p> <p><code>NetworkScope</code> can have the following values:</p> <ul style="list-style-type: none"> <li><code>NetworkId</code>—The ID of the Experience Cloud site in which the <code>FeedItem</code> is available. If left empty, the feed item is only available in the default Experience Cloud site.</li> <li><code>AllNetworks</code>—The feed item is available in all Experience Cloud sites.</li> </ul> <p>Note the following exceptions for <code>NetworkScope</code>:</p> <ul style="list-style-type: none"> <li>Only feed items with a Group or User parent can set a <code>NetworkId</code> or a null value for <code>NetworkScope</code>.</li> <li>For feed items with a record parent, users can set <code>NetworkScope</code> only to <code>AllNetworks</code>.</li> <li>You can't filter a feed item on the <code>NetworkScope</code> field.</li> </ul>
ParentId	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> ID of the record that is tracked in the feed. The detail page for the record displays the feed.</p>
RelatedRecordId	<p><b>Type</b> reference</p>

Field	Details
	<p><b>Properties</b> Group, Nillable, Sort</p> <p><b>Description</b> ID of the ContentVersion record associated with a ContentPost. This field is null for all posts except ContentPost.</p>
Title	<p><b>Type</b> string</p> <p><b>Properties</b> Group, Nillable, Sort</p> <p><b>Description</b> The title of the feed item. When the Type is LinkPost, the LinkUrl is the URL and this field is the link name.</p>
Type	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> The type of feed item. Values are:</p> <ul style="list-style-type: none"> <li>• <b>ActivityEvent</b>—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.</li> <li>• <b>AdvancedTextPost</b>—created when a user posts a group announcement and, in Lightning Experience as of API version 39.0 and later, when a user shares a post.</li> <li>• <b>AnnouncementPost</b>—Not used.</li> <li>• <b>ApprovalPost</b>—generated when a user submits an approval.</li> <li>• <b>BasicTemplateFeedItem</b>—Not used.</li> <li>• <b>CanvasPost</b>—a post made by a canvas app posted on a feed.</li> <li>• <b>CollaborationGroupCreated</b>—generated when a user creates a public group.</li> <li>• <b>CollaborationGroupUnarchived</b>—Not used.</li> <li>• <b>ContentPost</b>—a post with an attached file.</li> <li>• <b>CreatedRecordEvent</b>—generated when a user creates a record from the publisher.</li> <li>• <b>DashboardComponentAlert</b>—generated when a dashboard metric or gauge exceeds a user-defined threshold.</li> <li>• <b>DashboardComponentSnapshot</b>—created when a user posts a dashboard snapshot on a feed.</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>• <b>LinkPost</b>—a post with an attached URL.</li> <li>• <b>PollPost</b>—a poll posted on a feed.</li> <li>• <b>ProfileSkillPost</b>—generated when a skill is added to a user's Chatter profile.</li> <li>• <b>QuestionPost</b>—generated when a user posts a question.</li> <li>• <b>ReplyPost</b>—generated when Chatter Answers posts a reply.</li> <li>• <b>RypplePost</b>—generated when a user creates a Thanks badge in WDC.</li> <li>• <b>TextPost</b>—a direct text entry on a feed.</li> <li>• <b>TrackedChange</b>—a change or group of changes to a tracked field.</li> <li>• <b>UserStatus</b>—automatically generated when a user adds a post. Deprecated.</li> </ul>
Visibility	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Specifies whether this feed item is available to all users or internal users only. This field is available if Salesforce Communities are enabled for your organization.</p> <p>Visibility can have the following values:</p> <ul style="list-style-type: none"> <li>• <b>AllUsers</b>—The feed item is available to all users who have permission to see the feed item.</li> <li>• <b>InternalUsers</b>—The feed item is available to internal users only.</li> </ul> <p>Note the following exceptions for Visibility:</p> <ul style="list-style-type: none"> <li>• For record posts, Visibility is set to InternalUsers for all internal users by default.</li> <li>• External users can set Visibility only to AllUsers.</li> <li>• On user and group posts, only internal users can set Visibility to InternalUsers.</li> </ul>

## Usage

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

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

## Objects That Follow This Model

These objects follow the standard pattern for associated feed objects.

- [ActionableListMember](#)
- [AirTravelEmssnFctr](#)
- [AirTravelEnrgyUse](#)
- [Assessment](#)
- [ApplicationReview](#)
- [AssessmentIndicatorDefinition](#)
- [AssessmentQuestion](#)
- [AssessmentQuestionAssignment](#)
- [AssessmentQuestionResponse](#)
- [AssessmentQuestionSet](#)
- [AssessmentQuestionVersion](#)
- [AssetAccountParticipant](#)
- [AssetContactParticipant](#)
- [AssetMilestone](#)
- [BatchJob](#) on page 712
- [BatchJobPartFailedRecord](#) on page 720
- [BatchJobPart](#) on page 716
- [BenefitSchedule](#)
- [BenefitSession](#)
- [BldgEnrgyIntensity](#)
- [BldgEnrgyIntensityCnfg](#)
- [BldgEnrgyIntensityVal](#)
- [BldgSizeCategory](#)
- [Budget](#)
- [BudgetAllocation](#)
- [CrbnEmssnScopeAlloc](#)
- [CrbnEmssnScopeAllocVal](#)
- [ElectricityEmssnFctrSet](#)
- [ExpressionSet](#) on page 197
- [ExpressionSetVersion](#) on page 201
- [FrgtHaulingEmssnFctr](#)
- [FrgtHaulingEnrgyUse](#)
- [FundingAward](#)
- [FundingAwardAmendment](#)
- [FundingAwardRequirement](#)
- [FundingDisbursement](#)
- [FundingOpportunity](#)
- [GameDefinition](#)
- [GameParticipant](#)
- [GameParticipantReward](#)

- [GeneratedWaste](#)
- [GenericVisitTask](#)
- [GenericVisitTaskContext](#)
- [GnrcVstKeyPerformanceInd](#)
- [GnrcVstTaskContextRelation](#)
- [GroundTravelEmssnFctr](#)
- [GroundTravelEnrgyUse](#)
- [HotelStayEmssnFctr](#)
- [HotelStayEnrgyUse](#)
- [IndividualApplication](#)
- [InflationRate](#)
- [LeadLineItem](#)
- [LeadPreferredSeller](#)
- [LoyaltyMemberCurrency](#)
- [LoyaltyProgram](#)
- [OcrDocumentScanResult](#) on page 1089 (Intelligent Document Reader)
- [OcrDocumentScanResult](#) on page 1198 (Intelligent Form Reader)
- [OmniProcessAsmtQuestionVer](#)
- [OpportunityPreferredSeller](#)
- [OtherEmssnFctrSet](#)
- [OtherEmssnFctrSetItem](#)
- [PartyRelationshipGroup](#)
- [PcmtEmssnFctrSet](#)
- [PcmtEmssnFctrSetItem](#)
- [PreliminaryApplicationRef](#)
- [Program](#)
- [ProgramEnrollment](#)
- [Promotion](#)
- [PromotionChannel](#)
- [PromotionLimit](#)
- [PromotionLimitUsage](#)
- [PromotionLoyaltyPtnrProdt](#)
- [PromotionMarketSegment](#)
- [PromotionPartyUsage](#)
- [PromotionPartyUsageDetail](#)
- [PromotionProduct](#)
- [PromotionProductCategory](#)
- [PromotionRuleTemplate](#)
- [RecordAlert](#)
- [RefrigerantEmssnFctr](#)

- [RentalCarEmssnFctr](#)
- [RentalCarEnrgyUse](#)
- [Scope3CrbnFtprnt](#)
- [Scope3EmssnSrc](#)
- [Scope3PcmtItem](#)
- [Scope3PcmtSummary](#)
- [StnryAssetCrbnFtprnt](#)
- [StnryAssetCrbnFtprntItm](#)
- [StnryAssetEnrgyUse](#)
- [StnryAssetEnvrSrc](#)
- [RebateClaim](#)
- [VehicleAssetCrbnFtprnt](#)
- [VehicleAssetEmssnSrc](#)
- [VehicleAssetEnrgyUse](#)
- [WasteFootprint](#)
- [WasteFootprintItem](#)
- [WstDispoEmssnFctrSet](#)
- [WstDispoEmssnFctrSetItm](#)
- [StnryAssetEnrgyUseCnfg](#)
- [VehAssetEnrgyUseCnfg](#)
- [Vehicle](#)
- [VehicleDefinition](#)
- [Visit](#)

## *StandardObjectName*History

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

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

## Supported Calls

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

## Special Access Rules

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

## Fields

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

## Objects That Follow This Model

These objects follow the standard pattern for associated feed objects.

- [ActionableListMember](#)

- [AirTravelEmssnFctr](#)
- [AirTravelEnrgyUse](#)
- [Assessment](#)
- [ApplicationReview](#)
- [AssessmentIndicatorDefinition](#)
- [AssessmentQuestion](#)
- [AssessmentQuestionAssignment](#)
- [AssessmentQuestionResponse](#)
- [AssessmentQuestionSet](#)
- [AssessmentQuestionVersion](#)
- [AssessmentSignature](#) on page 830
- [AssetAccountParticipant](#)
- [AssetContactParticipant](#)
- [AssetMilestone](#)
- [BatchJob](#) on page 712
- [BatchJobPartFailedRecord](#) on page 720
- [BatchJobPart](#) on page 716
- [BenefitSchedule](#)
- [BenefitSession](#)
- [BldgEnrgyIntensity](#)
- [BldgEnrgyIntensityCnfg](#)
- [BldgEnrgyIntensityVal](#)
- [BldgSizeCategory](#)
- [Budget](#)
- [BudgetAllocation](#)
- [CrbnEmssnScopeAlloc](#)
- [CrbnEmssnScopeAllocVal](#)
- [DocumentDecisionRequirement](#)
- [ElectricityEmssnFctrSet](#)
- [ExpressionSet](#) on page 197
- [ExpressionSetVersion](#) on page 201
- [FrgtHaulingEmssnFctr](#)
- [FrgtHaulingEnrgyUse](#)
- [FundingAward](#)
- [FundingAwardAmendment](#)
- [FundingAwardRequirement](#)
- [FundingDisbursement](#)
- [FundingOpportunity](#)
- [GameDefinition](#)
- [GameParticipant](#)

- [GameParticipantReward](#)
- [GameReward](#)
- [GeneratedWaste](#)
- [GenericVisitTask](#)
- [GenericVisitTaskContext](#)
- [GnrcVstKeyPerformanceInd](#)
- [GnrcVstTaskContextRelation](#)
- [GroundTravelEmssnFctr](#)
- [GroundTravelEnrgyUse](#)
- [HotelStayEmssnFctr](#)
- [HotelStayEnrgyUse](#)
- [IndividualApplication](#)
- [InflationRate](#)
- [JournalSubType](#)
- [JournalType](#)
- [LeadLineItem](#)
- [LeadPreferredSeller](#)
- [LoyaltyMemberCurrency](#)
- [LoyaltyMembershipLifecycle](#)
- [LoyaltyMemberTier](#)
- [LoyaltyPartnerProduct](#)
- [LoyaltyPgmEngmtAttribute](#)
- [LoyaltyPgmEngmtAttrProm](#)
- [LoyaltyPgmGroupMbrRlnspHistory](#)
- [LoyaltyPgmMbrAttributeVal](#)
- [LoyaltyPgmPartnerCurrency](#)
- [LoyaltyPgmPartnerPromotion](#)
- [LoyaltyPgmPtnrPrepaidPack](#)
- [LoyaltyProgram](#)
- [LoyaltyProgramBadge](#)
- [LoyaltyProgramMbrPromotion](#)
- [LoyaltyProgramMember](#)
- [LoyaltyProgramMemberBadge](#)
- [LoyaltyProgramMemberCase](#)
- [LoyaltyProgramPartner](#)
- [LoyaltyProgramProcess](#)
- [LoyaltyTier](#)
- [MemberBenefit](#)
- [OcrDocumentScanResult](#) on page 1089 (Intelligent Document Reader)
- [OcrDocumentScanResult](#) on page 1198 (Intelligent Form Reader)


- [OmniProcessAsmtQuestionVer](#)
- [OpportunityPreferredSeller](#)
- [OtherEmssnFctrSet](#)
- [OtherEmssnFctrSetItem](#)
- [PartyRelationshipGroup](#)
- [PcmtEmssnFctrSet](#)
- [PcmtEmssnFctrSetItem](#)
- [PreliminaryApplicationRef](#)
- [Program](#)
- [ProgramEnrollment](#)
- [Promotion](#)
- [PromotionChannel](#)
- [PromotionLimit](#)
- [PromotionLimitUsage](#)
- [PromotionLoyaltyPtnrProdt](#)
- [PromotionMarketSegment](#)
- [PromotionPartyUsage](#)
- [PromotionPartyUsageDetail](#)
- [PromotionProduct](#)
- [PromotionProductCategory](#)
- [RebateClaim](#)
- [RecordAlert](#)
- [RefrigerantEmssnFctr](#)
- [RentalCarEmssnFctr](#)
- [RentalCarEnrgyUse](#)
- [Scope3CrbnFtprnt](#)
- [Scope3EmssnSrc](#)
- [Scope3PcmtItem](#)
- [Scope3PcmtSummary](#)
- [StnryAssetCrbnFtprnt](#)
- [StnryAssetCrbnFtprntItm](#)
- [StnryAssetEnrgyUse](#)
- [StnryAssetEnvrSrc](#)
- [VehicleAssetCrbnFtprnt](#)
- [VehicleAssetEmssnSrc](#)
- [VehicleAssetEnrgyUse](#)
- [VehAssetEnrgyUseCnfg](#)
- [Voucher](#)
- [VoucherDefinition](#)
- [WasteFootprint](#)

- [WasteFootprintItem](#)
- [WstDispoEmssnFctrSet](#)
- [WstDispoEmssnFctrSetltn](#)
- [StnryAssetEnrgyUseCnfg](#)
- [Vehicle](#)
- [VehicleDefinition](#)
- [Visit](#)

## *StandardObjectName*OwnerSharingRule

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

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

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

## Supported Calls


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

## Special Access Rules

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

## Fields

Field Name	Details
<code>AccessLevel</code>	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> Determines the level of access users have to records. Values are:</p> <ul style="list-style-type: none"> <li>• <code>Read</code> (read only)</li> <li>• <code>Edit</code> (read/write)</li> </ul>

Field Name	Details
Description	<p><b>Type</b> textarea</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> Description of the sharing rule. Maximum length is 1000 characters.</p>
DeveloperName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> 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.</p> <p> <b>Note:</b> 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.</p>
GroupId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> ID of the source group. Records that are owned by users in the source group trigger the rule to give access.</p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, idLookup, Sort, Update</p> <p><b>Description</b> Label of the sharing rule as it appears in the UI. Maximum length is 80 characters.</p>
UserOrGroupId	<p><b>Type</b> reference</p>

Field Name	Details
	<b>Properties</b> Create, Filter, Group, Sort
	<b>Description</b> 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.

- [ActionableListDtastClmnUsr](#)
- [ActionableListMember](#)
- [ActionPlanOwnerSharingRule](#)
- [ActionPlanTemplateOwnerSharingRule](#)
- [AirTravelEmssnFctr](#)
- [AirTravelEnrgyUse](#)
- [ApplicationReview](#)
- [AssessmentIndicatorDefinition](#)
- [AssetAccountParticipant](#)
- [AssetContactParticipant](#)
- [AssetMilestone](#)
- [BenefitSchedule](#)
- [BenefitSession](#)
- [BenefitType](#)
- [BldgEnrgyIntensity](#)
- [BldgEnrgyIntensityCnfg](#)
- [BldgEnrgyIntensityVal](#)
- [BldgSizeCategory](#)
- [Budget](#)
- [CrbnEmssnScopeAlloc](#)
- [CrbnEmssnScopeAllocVal](#)
- [DocumentDecisionRequirement](#)
- [ElectricityEmssnFctrSet](#)
- [ExpressionSetVersion](#) on page 201
- [FrgtHaulingEmssnFctr](#)
- [FrgtHaulingEnrgyUse](#)
- [FundingAward](#)
- [FundingOpportunity](#)
- [GeneratedWaste](#)
- [GenericVisitTask](#)

- [GenericVisitTaskContext](#)
- [GnrcVstKeyPerformanceInd](#)
- [GnrcVstTaskContextRelation](#)
- [GroundTravelEmssnFctr](#)
- [GroundTravelEnrgyUse](#)
- [HotelStayEmssnFctr](#)
- [HotelStayEnrgyUse](#)
- [IndividualApplication](#)
- [InflationRate](#)
- [JournalType](#)
- [LeadLineItem](#)
- [LeadPreferredSeller](#)
- [LoyaltyProgram](#)
- [LoyaltyProgramMember](#)
- [LoyaltyProgramMemberCase](#)
- [LoyaltyProgramPartner](#)
- [LoyaltyProgramProcess](#)
- [OpportunityPreferredSeller](#)
- [OtherEmssnFctrSet](#)
- [OtherEmssnFctrSetItem](#)
- [PartyRelationshipGroup](#)
- [PcmtEmssnFctrSet](#)
- [PcmtEmssnFctrSetItem](#)
- [PreliminaryApplicationRef](#)
- [Program](#)
- [ProgramEnrollment](#)
- [Promotion](#)
- [RebateClaim](#)
- [RefrigerantEmssnFctr](#)
- [RentalCarEmssnFctr](#)
- [RentalCarEnrgyUse](#)
- [Scope3CrbnFtprnt](#)
- [Scope3EmssnSrc](#)
- [Scope3PcmtItem](#)
- [Scope3PcmtSummary](#)
- [StnryAssetCrbnFtprnt](#)
- [StnryAssetCrbnFtprntltm](#)
- [StnryAssetEnrgyUse](#)
- [StnryAssetEnvrSrc](#)
- [VehicleAssetCrbnFtprnt](#)

- [VehicleAssetEmssnSrc](#)
- [VehicleAssetEnrgyUse](#)
- [VehAssetEnrgyUseCnfg](#)
- [WasteFootprint](#)
- [WasteFootprintItem](#)
- [WstDispoEmssnFctrSet](#)
- [WstDispoEmssnFctrSetItm](#)
- [StnryAssetEnrgyUseCnfg](#)
- [Vehicle](#)
- [VehicleDefinition](#)
- [Visit](#)

## *StandardObjectNameShare*

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

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

## Supported Calls

`create()`, `delete()`, `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
<code>AccessLevel</code>	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> The level of access allowed. Values are:</p> <ul style="list-style-type: none"><li>• <code>All</code> (owner)</li><li>• <code>Edit</code> (read/write)</li><li>• <code>Read</code> (read only)</li></ul>

Field Name	Details
ParentId	<b>Type</b> reference <b>Properties</b> Create, Filter, Group, Sort <b>Description</b> ID of the parent record.
RowCause	<b>Type</b> picklist <b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort <b>Description</b> Reason that the sharing entry exists.
UserOrGroupId	<b>Type</b> reference <b>Properties</b> Create, Filter, Group, Sort <b>Description</b> ID of the user or group that has been given access to the object.

## Objects That Follow This Model

These objects follow the standard pattern for associated feed objects.

- [AISentimentResult](#) on page 1517
- [ActionableListDtastClmnUsr](#)
- [ActionableListMember](#)
- [ActionPlanShare](#)
- [ActionPlanTemplateShare](#)
- [AirTravelEmssnFctr](#)
- [AirTravelEngryUse](#)
- [Assessment](#)
- [ApplicationReview](#)
- [AssessmentIndicatorDefinition](#)
- [AssessmentQuestion](#)
- [AssessmentQuestionAssignment](#)
- [AssessmentQuestionResponse](#)
- [AssessmentQuestionSet](#)
- [AssetAccountParticipant](#)
- [AssetContactParticipant](#)


- [AssetMilestone](#)
- [BenefitType](#)
- [BldgEnrgyIntensity](#)
- [BldgEnrgyIntensityCnfg](#)
- [BldgEnrgyIntensityVal](#)
- [BldgSizeCategory](#)
- [Budget](#)
- [CrbnEmssnScopeAlloc](#)
- [CrbnEmssnScopeAllocVal](#)
- [DocumentDecisionRequirement](#)
- [ElectricityEmssnFctrSet](#)
- [ExpressionSetVersion](#) on page 201
- [FrgtHaulingEmssnFctr](#)
- [FrgtHaulingEnrgyUse](#)
- [FundingAward](#)
- [FundingOpportunity](#)
- [GameDefinition](#)
- [GameParticipant](#)
- [GameParticipantReward](#)
- [GeneratedWaste](#)
- [GroundTravelEmssnFctr](#)
- [GroundTravelEnrgyUse](#)
- [HotelStayEmssnFctr](#)
- [HotelStayEnrgyUse](#)
- [GenericVisitTask](#)
- [GenericVisitTaskContext](#)
- [GnrcVstKeyPerformanceInd](#)
- [GnrcVstTaskContextRelation](#)
- [IndividualApplication](#)
- [InflationRate](#)
- [JournalType](#)
- [LeadLineItem](#)
- [LeadPreferredSeller](#)
- [LoyaltyLedgerTraceability](#)
- [LoyaltyProgram](#)
- [LoyaltyProgramMember](#)
- [LoyaltyProgramMemberCase](#)
- [LoyaltyProgramMemberMerge](#)
- [LoyaltyProgramPartner](#)
- [LoyaltyProgramProcess](#)

- [LoyaltyProgramWidget](#)
- [OmniProcessAsmtQuestionVer](#)
- [OpportunityPreferredSeller](#)
- [OtherEmssnFctrSet](#)
- [OtherEmssnFctrSetItem](#)
- [PartyRelationshipGroup](#)
- [PcmtEmssnFctrSet](#)
- [PcmtEmssnFctrSetItem](#)
- [PreliminaryApplicationRef](#)
- [ProgramEnrollment](#)
- [Promotion](#)
- [RebateClaim](#)
- [RecordAlert](#)
- [RefrigerantEmssnFctr](#)
- [RentalCarEmssnFctr](#)
- [RentalCarEnrgyUse](#)
- [Scope3CrbnFtprnt](#)
- [Scope3EmssnSrc](#)
- [Scope3PcmtItem](#)
- [Scope3PcmtSummary](#)
- [StnryAssetCrbnFtprnt](#)
- [StnryAssetCrbnFtprntItm](#)
- [StnryAssetEnrgyUse](#)
- [StnryAssetEnvrSrc](#)
- [VehicleAssetCrbnFtprnt](#)
- [VehicleAssetEmssnSrc](#)
- [VehicleAssetEnrgyUse](#)
- [VehAssetEnrgyUseCnfg](#)
- [Voucher](#)
- [VoucherDefinition](#)
- [WasteFootprint](#)
- [WasteFootprintItem](#)
- [WstDispoEmssnFctrSet](#)
- [WstDispoEmssnFctrSetItm](#)
- [StnryAssetEnrgyUseCnfg](#)
- [Vehicle](#)
- [Visit](#)

## IndustriesSettings

Represents settings for industries verticals such as Financial Services Cloud, Consumer Goods Cloud, Public Sector Solutions, Education Cloud, Salesforce Scheduler, Life Sciences Cloud, and Health Cloud.

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. Because changing terms in our code can break current implementations, we maintained this metadata type's name.

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

## File Suffix and Directory Location

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

## Version

Industries settings are available in API version 47.0 and later.

## Special Access Rules


Settings are specific to an industry vertical and are only available to customers with org editions where the vertical is enabled.

## Fields for Financial Services Cloud

Users need the FSC Insurance permission set to access the settings available in editions with Financial Services Cloud.

Field Name	Field Type	Description
<code>allowMultipleProducersToWorkOnSamePolicy</code>	boolean	Indicates whether multiple producers can be assigned to the same insurance policy. The default is <code>false</code> . This field is available in editions where Financial Services Cloud is enabled.
<code>createCustomerPropertyFromLAProperty</code>	boolean	When importing loan application data, indicates whether to create a customer property record from a loan application property record to represent the new home.
<code>createFinancialAccountFromLAAsset</code>	boolean	When importing loan application data, indicates whether to create financial account records from the assets listed in the loan application.
<code>createFinancialAccountFromLALiability</code>	boolean	When importing loan application data, indicates whether to create financial account records from the liabilities listed in the loan application.
<code>createFinancialAccountsFromLAFinancials</code>	boolean	When importing loan application data, indicates whether to create a financial account record that represents the mortgage loan.

Field Name	Field Type	Description
<code>createFinancialAccountsFromLAProperty</code>	boolean	When importing loan application data, indicates whether to create a financial account record from the loan application property to represent the new home.
<code>createFSCAssetFromLAAsset</code>	boolean	When importing loan application data, indicates whether to create asset records from the assets listed in the loan application.
<code>createFSCAssetFromLAProperty</code>	boolean	When importing loan application data, indicates whether to create an asset record from a loan application property record to represent the new home that was acquired.
<code>createFSCLiabilityFromLAFinancial</code>	boolean	When importing loan application data, indicates whether to create a liability record from a loan application property record to represent the new mortgage loan.
<code>createFSCLiabilityFromLALiability</code>	boolean	When importing loan application data, indicates whether to create liability records from the liabilities listed in the loan application.
<code>enableAccessToMasterListOfCoverageTypes</code>	boolean	Indicates whether insurance agents can access the main list of coverage types. The default is <code>false</code> . This field is available in editions where Financial Services Cloud is enabled.
<code>enableCallReportAdminContextPref</code>	boolean	Indicates whether admins can configure the Account Interactions component and use a component attribute to control whether end users can view data on the component with admin privileges ( <code>true</code> ) or not ( <code>false</code> ). The default is <code>false</code> .
<code>enableCalculationUsingParentPolicyOnly</code>	boolean	Indicates whether the policy premiums are calculated by using only the parent policy's premium ( <code>true</code> ) or not ( <code>false</code> ). Use this for hierarchical policies where premiums are stored at different levels. The default value is <code>false</code> .
<code>enableCompliantDataSharingForInteraction</code>	boolean	Indicates whether compliant data sharing is enabled for the Interaction object ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> .
<code>enableClaimMgmt</code>	boolean	Indicates whether the recording and processing of the first loss notifications and managing claim participants, coverages, and settlements are enabled ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> .
<code>enableCompliantDataSharingForAccount</code>	boolean	Indicates whether the Compliant Data Sharing feature is enabled for the Account object. The default is <code>false</code> . This field is available in editions where Financial Services Cloud is enabled.
<code>enableCompliantDataSharingForCustomObjects</code>	boolean	Indicates whether the Compliant Data Sharing feature is enabled for custom objects ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> . This field is available in editions where Financial Services Cloud is enabled.
<code>enableCompliantDataSharingForOpportunity</code>	boolean	Indicates whether the Compliant Data Sharing feature is enabled for the Opportunity object ( <code>true</code> ) or not ( <code>false</code> ). The default value is

Field Name	Field Type	Description
		<code>false</code> . This field is available in editions where Financial Services Cloud is enabled.
<code>enableCompliantDataSharingForInteractionSummary</code>	boolean	Indicates whether Compliant Data Sharing is enabled for the Interaction Summary object ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> .
<code>enableDealManagement</code>	boolean	Indicates whether the Financial Deal Management feature is enabled. The default is <code>false</code> . This field is available in editions where Financial Services Cloud is enabled.
<code>enableDiscoveryFrameworkMetadata</code>	boolean	Indicates whether the Assessment Question and Assessment Question Set features of the Discovery Framework Metadata are enabled ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> .
<code>enableEinsteinDocReaderMappings</code>	boolean	Indicates whether the Intelligent Form Reader Mappings feature is enabled. The default is <code>false</code> .
<code>enableEnhancedQuestionCreation</code>	boolean	Indicates whether the Enhanced Question Creation Experience feature of the Discovery Framework is enabled ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> .
<code>enableFinancialAccountMgmt</code>	boolean	Indicates whether the Financial Account Management Standard Objects setting is enabled for your org. The default is <code>false</code> . This field is available in editions where Financial Services Cloud is enabled.
<code>enableFinancialDealRoleHierarchy</code>	boolean	Indicates whether data sharing for the financial deals is configured to follow the role-based hierarchy ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> .
<code>enableFinancialDealCallReportCmpPref</code>	boolean	Indicates whether admins can use junction objects between the Financial Deal object and the Interaction and Interaction Summary objects within the Interaction Summary/Sharing component ( <code>true</code> ) or not ( <code>false</code> ). This field is available in API version 54.0 and later.
<code>enableFinancialDealCallReportPref</code>	boolean	Indicates whether the junction object is enabled between the Financial Deal object and the Interaction and Interaction Summary objects ( <code>true</code> ) or not ( <code>false</code> ). This field is available in API version 54.0 and later.
<code>enableFSCInsuranceReport</code>	boolean	Indicates whether sales managers can access the dashboard and prebuilt reports. The default is <code>false</code> . This field is available in API version 48.0 and later in editions where Financial Services Cloud is enabled.
 <b>Note:</b> This setting can be enabled only if the <code>allowMultipleProducersToWorkOnSamePolicy</code> setting is already set to <code>true</code> .		

Field Name	Field Type	Description
<code>enableIndustriesAssessment</code>	boolean	Indicates whether the Industries Assessment feature of the Discovery Framework is enabled ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> .
<code>enableIndustriesKYC</code>	boolean	Indicates whether the Industries KYC (Know Your Customer) is enabled ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> .
<code>enableInteractionRoleHierarchy</code>	boolean	Indicates whether role hierarchy-based sharing is available for interactions to users in the organization ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> .
<code>enableInteractionSummaryPref</code>	boolean	Indicates whether the Interaction Summary setting is enabled for your org. The default is <code>false</code> . This field is available in editions where Financial Services Cloud is enabled.
<code>enableInteractionSummaryRoleHierarchy</code>	boolean	Indicates whether the Role-Hierarchy-Based Sharing for Interaction Summaries is enabled for your org. The default is <code>false</code> . This field is available in editions where Financial Services Cloud is enabled.
<code>enableManyToManyRelationships</code>	boolean	Indicates whether insurance can manage many-to-many relationships between claims and cases, claims and assets, and assets and policy participants. For example, if set to <code>true</code> , agents can handle multiple claims through one case or have multiple cases handling one claim. The default is <code>false</code> . This field is available in editions where Financial Services Cloud is enabled.
<code>enableMortgageRlaTotalsOrgPref</code>	boolean	Indicates whether the calculation of assets and liabilities for residential loan application records is enabled for your org ( <code>true</code> ) or not ( <code>false</code> ). The default is <code>false</code> . This field is available in editions where Financial Services Cloud is enabled.
<code>enablePolicyAdministration</code>	boolean	Indicates whether the data model related to policy administrator is enabled ( <code>true</code> ) or not ( <code>false</code> ). If this option is enabled, entities such as transactions and transaction details are available within the policy admin data model. The default value is <code>false</code> .
<code>enableRBLUsingCalcService</code>	boolean	Indicates whether Roll-by-Lookup (RBL) Using Calc Service is enabled for your org. The default is <code>false</code> . This field is available in editions where Financial Services Cloud is enabled.
<code>enableRecordRollup</code>	boolean	Indicates whether Record Rollup Optimization is enabled for your org. The default is <code>false</code> . This field is available in editions where Financial Services Cloud is enabled.
<code>enableReferralScoring</code>	boolean	Indicates whether Einstein Referral Scoring for Financial Services Cloud is enabled for your org ( <code>true</code> ) or not ( <code>false</code> ). The default is <code>false</code> . This field is available in editions where Financial Services Cloud is enabled.
<code>enableSlackForCib</code>	boolean	Indicates whether the access to Financial Services Cloud capabilities on Slack is enabled ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> .

Field Name	Field Type	Description
<code>enableSyncInteractionsPref</code>	boolean	Indicates whether the Sync Interactions with Einstein Activity Capture setting is enabled ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> .
<code>enableTimelinePref</code>	boolean	Indicates whether the Timeline features are enabled for your organization ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> .
<code>loanApplicantAddressAutoCreation</code>	boolean	Indicates whether automatic generation of loan applicant records for new residential loan applications that are associated with person accounts is enabled for your org. The default is <code>false</code> . This field is available in editions where Financial Services Cloud is enabled. Available in API version 51.0 and later.
<code>loanApplicantAutoCreation</code>	boolean	Indicates whether automatic generation of loan applicant address records for new residential loan applications that are associated with person accounts is enabled for your org. The default is <code>false</code> . This field is available in editions where Financial Services Cloud is enabled. Available in API version 51.0 and later.
<code>rlaEditIfAccHasEdit</code>	boolean	Indicates whether a user can edit a residential loan application only if they have edit access on the account ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> .
<code>transformRBLtoDPE</code>	boolean	Indicates whether you can convert RBL rules into Data Processing Engine definitions for faster calculations. The default is <code>false</code> .

## Fields for Health Cloud

Field Name	Field Type	Description
<code>enableAuthorizationCustomSharingPCU</code>	boolean	Indicates whether to enable custom sharing to give your users access to view and manage electronic consent forms. Users with a Customer Community Plus license can share Authorization Form Texts and Data Use Purpose records with Accounts, Contracts, and Users specified in the Information Authorization Request record.
<code>enableCandidateMatching</code>	boolean	Indicates whether to enable Candidate Matching to automatically match candidates to clinical trials.
<code>enableCareMgmtSlackAccess</code>	boolean	Indicates whether Care Coordination for Slack app is enabled for your org ( <code>true</code> ) or not ( <code>false</code> ). Available in API version 56.0 and later.
<code>enableClinicalDataModel</code>	boolean	Indicates whether Clinical Data Model is enabled for your org ( <code>true</code> ) or not ( <code>false</code> ). The default is <code>false</code> . Available in API version 51.0 and later.

Field Name	Field Type	Description
<code>enableContactCenterAccess</code>	boolean	Indicates whether Contact Center for Health Cloud app is enabled for your org ( <code>true</code> ) or not ( <code>false</code> ). The default is <code>false</code> . Available in API version 56.0 and later.
<code>enableCustomFlowsOnCycleCount</code>	boolean	Indicates whether Custom Flows on Cycle Count page for the Health Cloud app is enabled for your org ( <code>true</code> ) or not ( <code>false</code> ). Available in API version 56.0 and later.
<code>enableCustomFlowsOnExpiryPage</code>	boolean	Indicates whether Custom Flows on Expiry page for Health Cloud app is enabled for your org ( <code>true</code> ) or not ( <code>false</code> ). Available in API version 56.0 and later.
<code>enableDiseaseSurveillancePref</code>	boolean	Indicates whether the disease surveillance preference that monitors infectious diseases is enabled ( <code>true</code> ) or not ( <code>false</code> ). Available in API version 64.0 and later.
<code>enableHcCorePatientConsole</code>	boolean	Indicates whether to enable the OOTB Health Cloud Console App for Patients viewing.
<code>enableHcStdRelationshipJunctions</code>	boolean	Indicates whether to start using the core group membership settings instead of the ones coming from package for existing managed customers or for new ones to start using the relationships from core directly.
<code>enableHlsClinicalDcsnSuptAccessOrgPreference</code>	boolean	Indicates whether to enable Clinical Decision Support capabilities (OOTB IP, Data Model, and others.) ( <code>true</code> ) or not ( <code>false</code> ).
<code>enableHlsFhirSubscriptionSetting</code>	boolean	Indicates whether to enable Documentation Template Rule (DTR) processes, data model underneath, and others for processing DTR use cases for Utilization Management & Clinical Decision Support users.
<code>enableIndustriesLPIPreference</code>	boolean	Indicates whether Industries Licensing, Permitting, and Inspections (LPI) feature is enabled for your org ( <code>true</code> ) or not ( <code>false</code> ). The default is <code>false</code> . This field is available in editions where Health Cloud is enabled. Available in API version 63.0 and later.
<code>enableLifeSciencesClinicalTrialManagement</code>	boolean	Indicates whether to enable participant recruitment and enrollment to help organizations design and execute clinical trials and manage trial participant journeys.
<code>enableMedicationManagementEnabled</code>	boolean	Indicates whether Medication Management is enabled for your org ( <code>true</code> ) or not ( <code>false</code> ). The default is <code>false</code> . This field is available in API version 53.0 and later.
<code>enableMedicalDeviceEnabled</code>	boolean	Indicates whether the Intelligent Sales features are enabled ( <code>true</code> ) or not ( <code>false</code> ).
<code>enableMedRecSetting</code>	boolean	Indicates whether Medication Reconciliation is enabled for your org ( <code>true</code> ) or not ( <code>false</code> ). The default is <code>false</code> . This field is available in API version 54.0 and later.

Field Name	Field Type	Description
enableMultipleCareProgramEnrolleeOrgPref	boolean	Indicates whether Multiple Care Program Enrollee is enabled for your org ( <code>true</code> ) or not ( <code>false</code> ). Available in API version 49.0 and later.
enableProviderSearchSyncOrgPref	boolean	Indicates whether provider data search is synced every six hours ( <code>true</code> ) or not ( <code>false</code> ). The default is <code>false</code> . This field is available in editions where Health Cloud is enabled.
enableRosterFileFeatureOrgPreference	boolean	Indicates whether this is the org pref used for the roster file in Provider Network Management ( <code>true</code> ) or not ( <code>false</code> ). The default is <code>false</code> .
enableTrialManagementConsentManagement	boolean	Indicates whether to enable consent management to help organizations take consent from prospective or enrolled candidates before storing their data.
enableUMPayerAppAccessOrgPreference	boolean	Indicates whether to enable the OOTB Console Utilization Management (UM) Payers App for UM Payers App Enablement. This setting can be enabled by Customers.
enableVisitInventoryEnabled	boolean	Indicates whether the visit data model is enabled ( <code>true</code> ) or not ( <code>false</code> ).
IsHomeHealthEnabled	boolean	Indicates whether users can schedule and execute visits for the home healthcare services they provide for their patients ( <code>true</code> ) or not ( <code>false</code> ).

## Fields for Life Sciences Cloud

Field Name	Field Type	Description
enableAdverseEvents	boolean	Indicates whether Adverse Events and its data model is enabled for your org ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> . Available in API version 61.0 and later.
enableComprehendMedical	boolean	Indicates whether Comprehend Medical Analysis is enabled for your org ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> . This field is available in API version 54.0 and later.
enableIESentimentAnalysis	boolean	Indicates whether Industries Einstein Sentiment Insights is enabled for your org ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> . This field is available in API version 54.0 and later.
enableLifeSciencesClinialTrailManagement	boolean	Indicates whether Clinical Trial Management and its data model is enabled for your org ( <code>true</code> ) or not ( <code>false</code> ). Using this feature, organizations can design and execute clinical trials and manage trial participant journeys. The default value is <code>false</code> . Available in API version 61.0 and later.

Field Name	Field Type	Description
<code>enableTrialManagementRandomization</code>	boolean	Indicates whether Research Study Randomization is enabled for your org ( <code>true</code> ) or not ( <code>false</code> ). Using this feature, users can design and run randomization procedures for their clinical trials. The default value is <code>false</code> . Available in API version 61.0 and later.

## Fields for Automotive Cloud

Field Name	Field Type	Description
<code>enableCriteriaBasedSearchAndFilter</code>	boolean	Indicates whether Criteria-Based Search and Filter is enabled for your org. The default is <code>false</code> . This field is available in editions where Automotive Cloud is enabled.

## Fields for Net Zero Cloud

Field Name	Description
<code>enableGnrcDisclsFrmwrk</code>	<b>Field Type</b> boolean <b>Description</b> Indicates whether the Industries Disclosure and Compliance Hub feature is enabled ( <code>true</code> ) or not ( <code>false</code> ) for your org. The default is <code>false</code> . Available in API version 57.0 and later in editions where Disclosure and Compliance Hub is enabled.
<code>enableMaterialityAssessment</code>	<b>Field Type</b> boolean <b>Description</b> Indicates whether the Manage Materiality Assessments feature is enabled for your org. The default is <code>false</code> . Available in API version 59.0 and later in editions where Net Zero Cloud is enabled.
<code>enableNZCMngEsgPgm</code>	<b>Field Type</b> boolean <b>Description</b> Indicates whether the Manage Environmental, Social, and Governance Programs feature is enabled for your org. The default is <code>false</code> . Available in API version 59.0 and later in editions where Net Zero Cloud is enabled.
<code>enableSCAssignFootprint</code>	<b>Field Type</b> boolean

Field Name	Description
	<b>Description</b> Indicates whether the Assign Carbon Footprint to Energy Use Records feature is enabled for your org. The default is <code>false</code> . Available in API version 54.0 and later in editions where Net Zero Cloud is enabled.
<code>enableSCBEIEnabled</code>	<b>Field Type</b> boolean <b>Description</b> Indicates whether the Manage Building Energy Intensity feature is enabled for your org. The default is <code>false</code> . Available in API version 54.0 and later in editions where Net Zero Cloud is enabled.
<code>enableSCCarbonAccounting</code>	<b>Field Type</b> boolean <b>Description</b> Indicates whether the Manage Carbon Accounting feature is enabled for your org. The default is <code>false</code> . Available in API version 54.0 and later in editions where Net Zero Cloud is enabled.
<code>enableSCCarbonCreditAlloc</code>	<b>Field Type</b> boolean <b>Description</b> Indicates whether the Allocate Carbon Credits to offset the unavoidable emissions feature is enabled for your org. The default is <code>false</code> . Available in API version 56.0 and later in editions where Net Zero Cloud is enabled.
<code>enableSCCreateFootprint</code>	<b>Field Type</b> boolean <b>Description</b> Indicates whether the Auto-Create Carbon Footprints feature is enabled for your org. The default is <code>false</code> . Available in API version 54.0 and later in editions where Net Zero Cloud is enabled.
<code>enableSCDGF</code>	<b>Field Type</b> boolean <b>Description</b> Indicates whether the Manage Data Gaps feature is enabled for your org. The default is <code>false</code> . Available in API version 54.0 and later in editions where Net Zero Cloud is enabled.
<code>enableSCExpansionUseCase</code>	<b>Field Type</b> boolean

Field Name	Description
	<b>Description</b> Indicates whether the Manage Carbon Accounting for Extended Organizational Boundaries feature is enabled for your org. The default is <code>false</code> . Available in API version 57.0 and later in editions where Net Zero Cloud is enabled.
<code>enableSCExternalEngMgmt</code>	<b>Field Type</b> boolean <b>Description</b> Indicates whether the Manage Supplier Sustainability Data feature is enabled for your org. The default is <code>false</code> . Available in API version 54.0 and later in editions where Net Zero Cloud is enabled.
<code>enableSCEmssnsForecasting</code>	<b>Field Type</b> boolean <b>Description</b> Indicates whether the Manage Carbon Emissions Forecast feature is enabled for your org. The default is <code>false</code> . Available in API version 54.0 and later in editions where Net Zero Cloud is enabled.
<code>enableSCSNGManagement</code>	<b>Field Type</b> boolean <b>Description</b> Indicates whether the Manage Social and Governance feature is enabled for your org. The default is <code>false</code> . Available in API version 57.0 and later in editions where Net Zero Cloud is enabled.
<code>enableSCScope3HubEnabled</code>	<b>Field Type</b> boolean <b>Description</b> Indicates whether the Manage Scope 3 Procurement Hub feature is enabled for your org. The default is <code>false</code> . Available in API version 54.0 and later in editions where Net Zero Cloud is enabled.
<code>enableSCTargetSetting</code>	<b>Field Type</b> boolean <b>Description</b> Indicates whether the Manage Emissions Target feature is enabled for your org. The default is <code>false</code> . Available in API version 54.0 and later in editions where Net Zero Cloud is enabled.
<code>enableSCWasteManagement</code>	<b>Field Type</b> boolean

Field Name	Description
	<b>Description</b> Indicates whether the Manage Waste-Related Data feature is enabled for your org. The default is <code>false</code> . Available in API version 54.0 and later in editions where Net Zero Cloud is enabled.
<code>enableSCWaterManagement</code>	<b>Field Type</b> boolean  <b>Description</b> Indicates whether the Manage Water-Related Data feature is enabled for your org. For example, water consumption, withdrawal, and discharge. The default is <code>false</code> . Available in API version 56.0 and later in editions where Net Zero Cloud is enabled.
<code>enableSustainabilityCloud</code>	<b>Field Type</b> boolean  <b>Description</b> Indicates whether the Net Zero Cloud feature is enabled for your org. The default is <code>false</code> . Available in API version 54.0 and later in editions where Net Zero Cloud is enabled.

## Fields for Public Sector Solutions Features

Industries settings for Public Sector Solutions features are available in API version 57.0 and later.

Field Name	Field Type	Description
<code>enableBenefitAndGoalSharingPref</code>	boolean	Indicates whether the benefit and goal sharing feature is enabled for your org. The default is <code>false</code> . Available in editions where Public Sector Solutions is enabled.
<code>enableBenefitManagementPreference</code>	boolean	Indicates whether the program and benefit management feature is enabled for your org. The default is <code>false</code> . Available in editions where Public Sector Solutions is enabled.
<code>enableCarePlansPreference</code>	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 <code>false</code> . Available in editions where Public Sector Solutions is enabled.  This field is available in API version 58.0 and later.
<code>enableEnhancedUIForISPref</code>		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

Field Name	Field Type	Description
		the notes with other users. The default is <code>false</code> . Available in editions where Public Sector Solutions is enabled.
		This field is available in API version 61.0 and later.

## Fields for Salesforce Scheduler

Field Name	Field Type	Description
<code>appointmentDistributionOrgPref</code>	boolean	Indicates whether to schedule appointments for service resources based on appointment distribution ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> . Available in API version 52.0 and later.
<code>captureResourceUtilizationOrgPref</code>	boolean	Indicates whether to use a background process to calculate the usage of service resources from service appointments ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> . Available in API version 52.0 and later.
<code>enableAnyResourceTypeOrgPref</code>	boolean	Indicates whether to enable Salesforce Scheduler to consider service resource records with Agent resource type ( <code>true</code> ) or not ( <code>false</code> ). Before enabling this setting, create a service resource record as Main for each user, or update one of the service resource records as Main for each user. The default value is <code>false</code> . Available in API version 57.0 and later.
<code>enableAppFrmAnywhereOrgPref</code>	boolean	Indicates whether to use engagement channels for setting up shifts, work types, and booking a service appointment ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> . Available in API version 56.0 and later. See the <a href="#">prerequisites</a> before you enable this setting.
<code>enableBlockResourceAvailabilityOrgPref</code>	boolean	Indicates whether Salesforce Scheduler service appointments are added to users' Salesforce calendars. For example, if set to <code>false</code> , users don't see their service appointments on their calendars. The default is <code>false</code> . Available in API version 47.0 and later.  This setting is used in Financial Services Cloud.
<code>enableCapacitySchedulingPref</code>	boolean	Indicates whether users can use capacity-based scheduling ( <code>true</code> ) or not ( <code>false</code> ). Use capacity-based scheduling to control the number of appointments that can be scheduled for a given shift and type of work. Available in API version 62.0 and later. See the <a href="#">prerequisite</a> before you enable this setting.
<code>enableCreateMultiAttendeeEventOrgPref</code>	boolean	Indicates whether users can group individual events, and view the list of all attendees under a single event <code>true</code> or not <code>false</code> . The default is <code>false</code> . See the <a href="#">prerequisites</a> before you enable this setting. Available in API version 55.0 and later.  This setting is used in Financial Services Cloud.

Field Name	Field Type	Description
<code>enableDropInAppointmentsOrgPref</code>	boolean	Indicates whether users can manage drop-in participants ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> . Available in API version 58.0 and later. See the <a href="#">prerequisite</a> before you enable this setting.
<code>enableDropInSkillMatchingOrgPref</code>	boolean	Indicates whether skill and skill level matching is enabled for service resources that are assigned to waitlists for a service territory ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> . Available in API version 58.0 and later.
<code>enableEventManagementOrgPref</code>	boolean	Indicates whether users can add Salesforce Scheduler service appointments to their Salesforce calendars. The default is <code>false</code> . Available in API version 47.0 and later.  This setting is used in Financial Services Cloud.
<code>enableEventWriteOrgPref</code>	boolean	Indicates whether to publish high-volume platform events when users create, update, or delete service appointments in Salesforce Scheduler ( <code>true</code> ) or not ( <code>false</code> ). If enabled, write these events to an external system to update it with Salesforce Scheduler service appointments. The default value is <code>false</code> . Available in API version 49.0 and later.
<code>enableMultipleTopicsForShiftsOrgPref</code>	boolean	Indicates whether the multiple topics for shifts feature is enabled ( <code>true</code> ) or disabled ( <code>false</code> ). The default value is <code>false</code> . Available in API version 56.0 and later. See the <a href="#">prerequisite</a> before you enable this setting.
<code>enableMultiResourceOrgPref</code>	boolean	Indicates whether users can add multiple service resources to a service appointment. The default is <code>false</code> . Available in API version 47.0 and later.  This setting is used in Financial Services Cloud.
<code>enableOverbookingOrgPref</code>	boolean	Indicates whether users can add multiple service appointments to a single time slot for a service resource. If set to <code>false</code> , concurrent time slots are visible, but can't be modified. The default is <code>false</code> . Available in API version 47.0 and later.  This setting is used in Financial Services Cloud.
<code>enableShareSaWithArOrgPref</code>	boolean	Indicates whether to share service appointments with assigned resources ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> . Available in API version 55.0 and later.
<code>enableTopicOrTemplate</code>	boolean	Indicates whether to use Salesforce Scheduler to manage Health Cloud appointments ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> . You must enable the <code>enableTopicTimeSlot</code> field before enabling this setting. Available in API version 52.0 and later.
<code>enableTopicTimeSlot</code>	boolean	Indicates whether to set operating hours for Service Territory Members for Work Type Groups ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> . Available in API version 52.0 and later.

Field Name	Field Type	Description
		See the <a href="#">prerequisites</a> before you enable this setting. After you enable this setting, you can't disable it.

## Fields for Education Cloud

Field Name	Field Type	Description
enableEducationCloud	boolean	Indicates whether Education Cloud is enabled in Salesforce (true) or not (false). The default is <code>false</code> . Available in API version 57.0 and later in Developer, Enterprise, Performance and Unlimited editions.
enableStudentSuccess	boolean	Indicates whether Student Success is enabled in Salesforce (true) or not (false). The default is <code>false</code> . Available in API version 58.0 and later in Developer, Enterprise, Performance and Unlimited editions.
enableAcademicOperations	boolean	Indicates whether Academic Operations is enabled in Salesforce (true) or not (false). The default is <code>false</code> . Available in API version 59.0 and later in Developer, Enterprise, Performance and Unlimited editions.
enableAlumniRelations	boolean	Indicates whether Alumni Relations is enabled (true) or not (false). The default is <code>false</code> . Available in API version 59.0 and later in Developer, Enterprise, Performance and Unlimited editions.
enableMentoring	boolean	Indicates whether Mentoring is enabled (true) or not (false). The default is <code>false</code> . Available in API version 60.0 and later in Developer, Enterprise, Performance and Unlimited editions.

## Declarative Metadata Sample Definition

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

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

  <enableAccessToMasterListOfCoverageTypes>true</enableAccessToMasterListOfCoverageTypes>

  <enableManyToManyRelationships>true</enableManyToManyRelationships>

<allowMultipleProducersToWorkOnSamePolicy>false</allowMultipleProducersToWorkOnSamePolicy>

  <enableMortgageRlaTotalsOrgPref>true</enableMortgageRlaTotalsOrgPref>
  <enableObjectDetection>true</enableObjectDetection>
  <enableProviderSearchSyncOrgPref>true</enableProviderSearchSyncOrgPref>
```


```
<enableReferralScoring>true</enableReferralScoring>
<enableFSCInsuranceReport>true</enableFSCInsuranceReport>
<enableSCCarbonAccounting>true</enableSCCarbonAccounting>
<enableBenefitAndGoalSharingPref>true</enableBenefitAndGoalSharingPref>
<enableBenefitManagementPreference>true</enableBenefitManagementPreference>
<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>47.0</version>
</Package>
```

# Industries Object Access by Community License


A community license determines the baseline set of object access available to an Experience Cloud user. This page lists the levels of object access you can grant to Experience site users in Industries clouds under each of these licenses: Customer Community, Customer Community Plus, Partner Community, and External Apps.

 **Note:** This table lists all objects provided by all Industries products. Not all of these objects are available with your specific Industries Cloud license.

Each community license can make create, read, edit, or delete permissions available to Experience Cloud users for specific data objects. Assign user permissions for data access through a profile, permission set, or both.

Each license has a "login" version that provides identical access levels. If you run into any difficulties with a login license, contact your Salesforce representative.

Objects in **bold** are automatically available to users when the license is provisioned. All other objects must be assigned in a profile or permission set.

 **Note:** As a best practice, always clone the standard profile associated with a community license, and change object permissions as needed. If you want to limit the number of cloned profiles, use permission sets to assign object permissions.

EDITIONS

Available in: Lightning Experience

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

	Customer Community	Customer Community Plus	Partner Community	External Apps
Account	<b>Read</b> , Edit	Create, <b>Read</b> , Edit	Create, <b>Read</b> , Edit	<b>Read</b> , Edit
AccountBrand	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
AccountRelationship		Read	Read	
Accreditation	Create, Read, Edit	Create, Read, Edit, Delete	Create, Read, Edit	Create, Read, Edit, Delete
ActionPlan			<b>Create, Read, Edit, Delete</b>	<b>Create, Read, Edit, Delete</b>

	Customer Community	Customer Community Plus	Partner Community	External Apps
ActionPlanTemplate	Read	Read	Create, Read, Edit, Delete	Create, Read, Edit, Delete
Address	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
AiVisitRecommendation	Read, Edit	Read, Edit	Read, Edit	Read, Edit
AiVisitTaskRcmd	Read, Edit	Read, Edit	Read, Edit	Read, Edit
ApplicationCase	Create, Read, Edit, Delete			
AppointmentTopicTimeSlot	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
AssessmentIndicatorDefinition	Create, Read, Edit	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
AssessmentTask	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
AssessmentTaskContentDocument	Create, Read, Edit	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
AssessmentTaskDefinition	Create, Read, Edit	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
AssessmentTaskIndDefinition	Create, Read, Edit	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
AssessmentTaskOrder	Create, Read, Edit	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
Asset	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
Assortment	Read	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
AssortmentProduct	Read	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
AuthApplicationAsset	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	
AuthApplicationPlace	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
AuthLocationAccessSchedule	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
AuthorizationForm	Read	Read	Read	Read
AuthorizationFormConsent	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
AuthorizationFormDataUse	Read	Read	Read	Read
AuthorizationFormText	Read	Read	Read	Read
AuthorizedInsuranceLine	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
Award	Create, Read, Edit	Create, Read, Edit, Delete	Create, Read, Edit	Create, Read, Edit, Delete
BackgroundOperation	Read	Read	Read	<b>Read</b>
Benefit	Read	Read	Read	Read
BenefitParameterValue	Read	Read	Read	Read
BenefitType	Read	Read	Read	Read
BoardCertification	Create, Read, Edit	Create, Read, Edit, Delete	Create, Read, Edit	Create, Read, Edit, Delete

	Customer Community	Customer Community Plus	Partner Community	External Apps
BusinessLicense	Create, Read, Edit	Create, Read, Edit, Delete	Create, Read, Edit	Create, Read, Edit, Delete
BusinessLicenseApplication	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
BusinessMilestone	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
BusinessProfile	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
BusinessType	Read	Read	Read	Read, Edit
BusRegAuthorizationType	Read	Read	Read	Read
BusRegAuthTypeDependency	Read	Read	Read	Read
BuyerAccount	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	
Campaign			Create, Read, Edit	
CareBarrier	<b>Create, Read, Edit, Delete</b>	<b>Create, Read, Edit, Delete</b>	<b>Create, Read, Edit, Delete</b>	
CareBarrierDeterminant	<b>Create, Read, Edit, Delete</b>	<b>Create, Read, Edit, Delete</b>	<b>Create, Read, Edit, Delete</b>	
CareBarrierType	<b>Create, Read, Edit, Delete</b>	<b>Create, Read, Edit, Delete</b>	<b>Create, Read, Edit, Delete</b>	
CareDeterminant	<b>Create, Read, Edit, Delete</b>	<b>Create, Read, Edit, Delete</b>	<b>Create, Read, Edit, Delete</b>	
CareDeterminantType	<b>Create, Read, Edit, Delete</b>	<b>Create, Read, Edit, Delete</b>	<b>Create, Read, Edit, Delete</b>	
CareDiagnosis	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	
CareInterventionType	<b>Create, Read, Edit, Delete</b>	<b>Create, Read, Edit, Delete</b>	<b>Create, Read, Edit, Delete</b>	
CareMetricTarget	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
CareObservation	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
CarePgmProvHealthcareProvider	Read	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Read
CarePractnFacilityAppt	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
CarePreauth	<b>Read</b>	<b>Read</b>	<b>Read</b>	<b>Read</b>
CarePreauthItem	<b>Read</b>	<b>Read</b>	<b>Read</b>	<b>Read</b>
CareProgram	Read	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Read
CareProgramCampaign	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
CareProgramEligibilityRule	Read	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Read
CareProgramEnrollee	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete

	<b>Customer Community</b>	<b>Customer Community Plus</b>	<b>Partner Community</b>	<b>External Apps</b>
CareProgramEnrolleeProduct	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
CareProgramEnrollmentCard	Create, Read	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read
CareProgramGoal	Read	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Read
CareProgramProduct	Read	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Read
CareProgramProvider	Read	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Read
CareProgramTeamMember	Read	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Read
CareProviderAdverseAction	Create, Read, Edit	Create, Read, Edit, Delete	Create, Read, Edit	Create, Read, Edit, Delete
CareProviderFacilitySpecialty	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
CareProviderSearchableField	Read	Read	Read	Read
CareRegisteredDevice	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
CareRequest	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	
CareRequestDrug	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	
CareRequestExtension	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	
CareRequestItem	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	
CareRequestReviewer	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	
CareSpecialty	Create, Read, Edit	Create, Read, Edit, Delete	Create, Read, Edit	Create, Read, Edit, Delete
CareSpecialtyTaxonomy		Create, Read, Edit, Delete		Create, Read, Edit, Delete
CareTaxonomy	Create, Read, Edit	Create, Read, Edit, Delete	Create, Read, Edit	Create, Read, Edit, Delete
Case	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	
ChannelProgram			Read	
ChannelProgramLevel			Read	
ChannelProgramMember			Read	
Claim	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
ClaimCase	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	
ClaimCoverage	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
ClaimItem	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
ClaimParticipant	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
ClaimPaymentSummary	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
CodeSet	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
CommSubscription	Read	Read	Read	Read

	Customer Community	Customer Community Plus	Partner Community	External Apps
CommSubscriptionChannelType	Read	Read	Read	Read
CommSubscriptionConsent	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
CommSubscriptionTiming	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
ComplaintCase	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	
ConsumptionSchedule			Create, Read, Edit	
Contact	Create, <b>Read</b> , Edit	Create, <b>Read</b> , Edit	Create, <b>Read</b> , Edit	Create, <b>Read</b> , Edit
ContactEncounter	Create, Read	Create, Read	Create, Read, Edit, Delete	
ContactPointAddress	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit
ContactPointConsent	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
ContactPointEmail	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
ContactPointPhone	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
ContactPointTypeConsent	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
Contract	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
ContractLineItem		Create, Read, Edit	Create, Read, Edit	
CourseOffering	Read	Read	Read	Read
CoverageBenefit	<b>Read</b>	<b>Read</b>	<b>Read</b>	<b>Read</b>
CoverageBenefitItem	<b>Read</b>	<b>Read</b>	<b>Read</b>	<b>Read</b>
CoverageType	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
CustomerProperty	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
DandBCompany			Create, Read, Edit, Delete	
DataUsePurpose	Read	Read	Read	Read
DeliveryTask	Create, Read, Edit	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
DistributorAuthorization	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
Document	<b>Read</b>	<b>Read</b>	<b>Read</b>	<b>Read</b>
DocumentChecklistItem	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
DocumentTemplate	Read	Read	Read	Read
DocumentTemplateClause	Read	Read	Read	Read
ElectronicMediaGroup	Read	Read	Read	
EngagementChannelType	Read	Read	Read	Read
EnrolleeBenefit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit

	<b>Customer Community</b>	<b>Customer Community Plus</b>	<b>Partner Community</b>	<b>External Apps</b>
EnrollmentEligibilityCriteria	Read	Read	Read	Read
Entitlement	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	
EntitlementContact	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	
Examination	Read	Read	Read	Read
Expense	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
ExpenseReport	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
FulfillmentOrder	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
GeneratedDocument	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
HealthCareDiagnosis	<b>Read</b>	<b>Read</b>	<b>Read</b>	
HealthcareFacilityNetwork	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
HealthcarePayerNetwork	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
HealthcarePractitionerFacility	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
HealthCareProcedure	<b>Read</b>	<b>Read</b>	<b>Read</b>	
HealthcareProvider	Create, Read, Edit	Create, Read, Edit, Delete	Create, Read, Edit	Create, Read, Edit, Delete
HealthcareProviderNpi	Create, Read, Edit	Create, Read, Edit, Delete	Create, Read, Edit	Create, Read, Edit, Delete
HealthcareProviderSpecialty	Create, Read, Edit	Create, Read, Edit, Delete	Create, Read, Edit	Create, Read, Edit, Delete
HealthcareProviderTaxonomy	Create, Read, Edit	Create, Read, Edit, Delete	Create, Read, Edit	Create, Read, Edit, Delete
Household	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
Idea	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
IdeaTheme	Read	Read	Read	Read
IdentityDocument	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit
Image	Create, Read	Create, Read	Create, Read	Create, Read
Individual	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
IndividualApplication	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
InfoAuthorizationRequest	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	
InspectionAssessmentInd	Read	Read	Read	Read
InspectionType	Read	Read	Read	Read, Edit
InspectionViolation		Read	Read	
InStoreLocation	Create, Read	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
InsuranceClaimAsset	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete

	<b>Customer Community</b>	<b>Customer Community Plus</b>	<b>Partner Community</b>	<b>External Apps</b>
InsurancePolicy	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
InsurancePolicyAsset	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
InsurancePolicyCoverage	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
InsurancePolicyMemberAsset	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
InsurancePolicyParticipant	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
InsurancePolicySurcharge	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
InsurancePolicyTransaction	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
InsuranceProfile	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
JobProfile	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
JournalSubType	<b>Read</b>	<b>Read</b>	<b>Read</b>	<b>Read</b>
JournalType	<b>Read</b>	<b>Read</b>	<b>Read</b>	<b>Read</b>
Lead			Create, <b>Read</b> , Edit	
LegalEntity	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
LoanApplicant	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
LoanApplicantAddress	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
LoanApplicantAsset	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
LoanApplicantDeclaration	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
LoanApplicantEmployment	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
LoanApplicantIncome	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
LoanApplicantLiability	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
LoanApplicationAsset	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
LoanApplicationFinancial	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
LoanApplicationLiability	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
LoanApplicationProperty	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
LoanApplicationTitleHolder	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
Location	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
LocationGroup	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
LoyaltyLedger	<b>Read</b>	<b>Read</b>	<b>Read</b>	<b>Read</b>
LoyaltyMemberCurrency	<b>Read</b>	<b>Read</b>	<b>Read</b>	<b>Read</b>
LoyaltyMemberTier	<b>Read</b>	<b>Read</b>	<b>Read</b>	<b>Read</b>

	Customer Community	Customer Community Plus	Partner Community	External Apps
LoyaltyProgram	<b>Read</b>	<b>Read</b>	<b>Read</b>	<b>Read</b>
LoyaltyProgramCurrency	<b>Read</b>	<b>Read</b>	<b>Read</b>	<b>Read</b>
LoyaltyProgramMbrPromotion	Read	Read	Read	Read
LoyaltyProgramMember	<b>Read</b>	<b>Read</b>	<b>Read</b>	<b>Read</b>
LoyaltyProgramPartner	Create, <b>Read</b> , Edit, Delete	Create, <b>Read</b> , Edit, Delete	Create, <b>Read</b> , Edit, Delete	Create, <b>Read</b> , Edit, Delete
LoyaltyTier	<b>Read</b>	<b>Read</b>	<b>Read</b>	<b>Read</b>
LoyaltyTierBenefit	Read	Read	Read	Read
LoyaltyTierGroup	<b>Read</b>	<b>Read</b>	<b>Read</b>	<b>Read</b>
MaintenancePlan	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	
MaintenanceWorkRule	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	
MemberBenefit	Read	Read	Read	Read
MemberPlan	<b>Create, Read, Edit</b>	<b>Create, Read, Edit</b>	<b>Create, Read, Edit</b>	<b>Create, Read, Edit</b>
OccupationLicenseApplication		Create, Read, Edit	Create, Read, Edit	
OmniDataTransform	Read	Read	Read	Read
OmniDataTransformItem	Read	Read	Read	Read
OmniESignatureTemplate	Read	Read	Read	Read
OmniProcess	Read	Read	Read	Read
OmniProcessCompilation	Read	Read	Read	Read
OmniProcessElement	Read	Read	Read	Read
OmniScriptSavedSession	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
OmniUiCard	Read	Read	Read	Read
OperatingHours	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	
Opportunity			Create, <b>Read</b> , Edit	
Order	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
OrderDeliveryMethod	Read, Create, Edit	Read, Create, Edit	Read	Read, Create, Edit
OrderSummary	Read, Edit	Read, Edit	Read, Edit	Read, Edit
PartnerFundAllocation			Create, Read, Edit	
PartnerFundClaim			Create, Read, Edit	
PartnerFundRequest			Create, Read, Edit	

	<b>Customer Community</b>	<b>Customer Community Plus</b>	<b>Partner Community</b>	<b>External Apps</b>
PartnerMarketingBudget			Create, Read, Edit	
PartyConsent	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
PartyIncome	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
PartyRelatedParty	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
PartyRelationshipType	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
PersonEducation	Create, Read, Edit	Create, Read, Edit, Delete	Create, Read, Edit	Create, Read, Edit, Delete
PersonEmployment		Create, Read, Edit, Delete		Create, Read, Edit, Delete
PersonExamination	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit	Create, Read, Edit, Delete
PersonLifeEvent	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
PgmRebateTypBnftMapping	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
PlanBenefit	Read	Read	Read	Read
PlanBenefitItem	Read	Read	Read	Read
Polygon	Read	Read		Read, Create, Delete, Edit
PreliminaryApplicationRef	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
Pricebook2	Read	Read	Read	Read
Producer	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
ProducerCommission	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
ProducerPolicyAssignment	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
Product2	Read	Read	Read	Read
ProductCatalog	Read	Read	Read	Read
ProductCategory	Read	Read	Read	Read
ProductCategoryProduct	Create, Read	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
ProductCoverage	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
ProductItem	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	
ProductRequest	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	
ProductServiceCampaign	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	
ProductTransfer	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	
ProgramRebateType	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
ProgramRebateTypeBenefit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
ProgramRebateTypeFilter	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit

	Customer Community	Customer Community Plus	Partner Community	External Apps
ProgramRebateTypePayout	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
ProgramRebateTypPayoutSrc	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
Promotion	Read	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
PromotionChannel	Read	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
PromotionProduct	Read	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
PromotionProductCategory	Create, Read	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
PublicComplaint	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit	Create, Read, Edit, Delete
PublicProgram	Read	Read	Read	Read
PurchaserPlan	<b>Create, Read, Edit</b>	<b>Create, Read, Edit</b>	<b>Create, Read, Edit</b>	<b>Create, Read, Edit</b>
PurchaserPlanAssn	<b>Create, Read, Edit</b>	<b>Create, Read, Edit</b>	<b>Create, Read, Edit</b>	<b>Create, Read, Edit</b>
Question	Create, Read	Create, Read	Create, Read	Create, Read
Quote			Create, <b>Read</b> , Edit	
RebateMemberProductAggregate	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
RebatePayment	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
RebatePayoutAdjustment	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
RebateProgram	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
RebateProgramMember	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
ReceivedDocument	Read	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Read
RecordsetFilterCriteria	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
RegAuthorizationTypeProduct	Read	Read	Read	Read
RegulatoryAuthority	Read	Read	Read	Read
RegulatoryAuthorizationType	Read	Read	Read	Read
RegulatoryCode	Read	Read	Read	Read
RegulatoryCodeAssessmentInd	Read	Read	Read	Read
RegulatoryCodeViolation	Read	Read	Read	Read
RegulatoryTrxnFee	Create, Read, Edit	Create, Read, Edit		Create, Read, Edit
RegulatoryTrxnFeeltem	Create, Read, Edit	Create, Read, Edit		Create, Read, Edit
ResidentialLoanApplication	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
RetailLocationGroup	Create, Read	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
RetailStore	Create, Read	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit

	Customer Community	Customer Community Plus	Partner Community	External Apps
RetailStoreGroupAssignment	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
RetailStoreKpi	Create, Read	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
RetailVisitKpi	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
ReturnOrder	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	
SalesAgreement	Read, Edit	Read, Edit	Read, Edit	Read, Edit
SecuritiesHolding	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
SerializedProduct	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
ServiceAppointment	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	
ServiceContract		Create, Read, Edit	Create, Read, Edit	
ServiceCrew	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	
ServiceResource	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Read
ServiceTerritory	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	
Shift	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
ShiftPattern	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
Shipment	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
SocialPost	Read	Read	Read	Read
Solution	<b>Read</b>	<b>Read</b>	<b>Read</b>	
StoreActionPlanTemplate	Create, Read	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
StoreAssortment	Read	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
StoreProduct	Read	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
Survey	<b>Read</b>	<b>Read</b>	<b>Read</b>	<b>Read</b>
SurveyInvitation	<b>Read</b>	<b>Read</b>	<b>Read</b>	<b>Read</b>
SurveyResponse	<b>Create, Read, Edit</b>	<b>Create, Read, Edit</b>	<b>Create, Read, Edit</b>	<b>Create, Read, Edit</b>
SurveySubject	<b>Read</b>	<b>Read</b>	<b>Read</b>	<b>Read</b>
TimeSheet	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
TrainingCourseParticipant	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
TransactionJournal	<b>Read</b>	<b>Read</b>	<b>Read</b>	<b>Read</b>
TrnCourse	Read	Read	Read	Read
UnitOfMeasure	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
UnitOfMeasureConversion	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit

	<b>Customer Community</b>	<b>Customer Community Plus</b>	<b>Partner Community</b>	<b>External Apps</b>
VehicleUserAssignment	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
ViolationEnforcementAction	Read, Edit	Read, Edit	Read	Read, Edit
ViolationInspAssessmentInd		Read	Read	
ViolationType	Read	Read	Read	Read
ViolationTypeAssessmentInd	Read	Read	Read	Read
Visit	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
VisitedParty	Create, Read	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
Visitor	Create, Read	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
VolunteerProject	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
Voucher	Read	Read	Read	Read
VoucherDefinition	Read	Read	Read	Read
WarrantyTerm	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
WebCart	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	
WebStore	Read	Read	Read	
WebStoreCatalog	Read	Read	Read	
Wishlist	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	
WorkCapacityLimit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	
WorkerCompCoverageClass	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete	Create, Read, Edit, Delete
WorkOrder	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	
WorkPlan	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	
WorkPlanSelectionRule	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	
WorkPlanTemplate	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	
WorkStepTemplate	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	
WorkType	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
WorkTypeCareSpecialty	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
WorkTypeCodeSetBundle	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit
WorkTypeGroup	Create, Read, Edit	Create, Read, Edit	Create, Read, Edit	

## Access Industries Features Deployed Using Managed Packages

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Some of the features of Industries are deployed in your org using managed packages. To access records of features that are deployed using managed packages, you must use Apex REST methods.

When trying to access records of features deployed using a managed package, the REST call URL must contain the namespace of the managed package.

### EDITIONS

Health Cloud and Financial Services Cloud are available in Salesforce Classic and Lightning Experience

Available in: Enterprise, Performance, and Unlimited Editions with Health Cloud and Financial Services Cloud

`https://instance.salesforce.com/services/apexrest/packageNamespace/MyMethod/.`

For example, here's how a call to view the details of all the individuals in an org where Health Cloud's managed package is deployed.

`services/apexrest/org1_gs0/v1/individual/`

To know more about Apex REST methods, see [Apex REST Methods](#).