



Salesforce Contracts

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CHAPTER 1 Salesforce Contracts

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Salesforce Contracts is a next-generation Contract Lifecycle Management (CLM) application that enables businesses to efficiently and collaboratively manage their contracts, right from authoring and negotiations through approval and execution. Documents, data, and life cycles of multiple types of contracts can be managed centrally in Salesforce, providing organizations complete visibility into their contracting activities. Salesforce Contracts provides a highly usable, configurable, and extensible contracting platform that can be integrated with industry specific use cases. Salesforce Contracts functionality is centered around the "Contract" object of Salesforce, which is enriched and extended to support this new application.

Salesforce Contracts Standard Objects

Use standard objects to work with the Salesforce Contracts application.

[ClauseCatgConfiguration](#)

Represents the configuration about the clause category that can be used in a response document by the user.

[ContextUseCaseMapping](#)

Represents the setup configuration details such as the context definition and mapping definitions used to invoke context service APIs. This object is available in API version 61.0 and later.

[ContractDocumentReview](#)

Represents the review process-related details, such as the reference object type and review status. This object is available in API version 58.0 and later.

[ContractDocumentVersion](#)

Tracks contract document versions through contract lifecycle stages. This object is available in API version 56.0 and later.

[ContractDocVerContentDoc](#)

Associates a contract document version with a content document. This object is available in API version 56.0 and later.

[ContractDocVersionSection](#)

Tracks contract document sections through contract lifecycle stages. This object is available in API version 56.0 and later.

[ContractExtractionResult](#)

Represents contract-specific data extracted by the Contracts AI from an uploaded PDF that's ready for review. For example, account name, owner, start date, contract name, contract record type, contract term, and clauses. Before contract record creation, users can access, review, and modify the temporarily stored information. This object is available in API version 60.0 and later.

[ContractType](#)

A sub type that groups contracts with similar characteristics, such as lifecycle states, permissions, and templates and clauses used. This object is available in API version 56.0 and later.

[ContractTypeConfig](#)

The settings that define the characteristics and behavior of all contracts of that type. This object is available in API version 56.0 and later.

[DocGenerationBatchProcess](#)

Represents a grouping of document generation requests associated with the batch document generation ID. Only one batch document generation request can be processed at a time. To create a new batch document generation record, pause or cancel the current record. This object is available in API version 58.0 and later.

[DocGenBtchStsChgEvent](#)

Represents the change in the status of the batch document generation request. A batch document generation request groups multiple document generation requests by associating the individual requests with a batch document generation ID. This object is available in API version 62.0 and later.

[DocGenProcStsChgEvent](#)

Represents the change in status of a document generation request. This object is available in API version 62.0 and later.

[DocumentAuthoredContent](#)

Represents the metadata of the content within the content boundary of a document such as a template or contract document. You can store metadata details of the marked clauses and sections in Salesforce with the document authored content. This object is available in API version 58.0 and later.

[DocumentClause](#)

Represents a clause that can be associated with multiple documents.

[DocumentClauseSet](#)

Represents a grouping for clauses, which can hold multiple variations of the same clause such as main clause and alternate pre-approved clauses based on language.

[DocumentEnvelope](#)

The container for a document that is routed for signatures. This object is available in API version 56.0 and later.

[DocumentGenerationProcess](#)

Supports server-side document generation requests and responses. This object is available in API version 56.0 and later.

[DocumentGenerationSetting](#)

Represents an org's settings for automatic document generation from templates. This object is available in API version 54.0 and later.

[DocumentTemplate](#)

Represents information about dynamic document generation. This object is available in API version 56.0 and later.

[DocumentTemplateConfig](#)

Represents the shadow object that supports migration of document templates between environments. The Developer field in the shadow object references the UniqueName field in the document template object and is used to retrieve the document template details. For internal use only. This object is available in API version 58.0 and later.

[DocumentTemplateSection](#)

Represents a section in a document template. A document template section can be a clause, image, context, embedded template, or signature. This object is available in API version 52.0 and later.

[ESignatureConfig](#)

The settings for integrating with external eSignature providers. This object is available in API version 56.0 and later.

[ESignatureEnvelopeConfig](#)

The notification-specific settings for integrating with external eSignature providers. This object is available in API version 56.0 and later.

[ExternalDocStorageConfig](#)

Represents a collection of fields to configure the external document storage for an object. It includes details such as location, path, and named credentials. For example, OneDrive is defined as an External Document Storage and is associated with the Salesforce Contract object.

[GeneratedDocumentSection](#)

Represents a section of a generated document. This object is available in API version 60.0 and later.

[ObjectStateActionDefinition](#)

Represents the link between the object state definition and object state transition based on a defined action.

[ObjectStateTransitionAction](#)

Represents a junction between object state transition and object state action definition. State transition determines the valid transition of an object from one state to another and the state action determines which action triggers which state transition.

[Obligation](#)

Represents an obligation between parties to fulfill agreed conditions, such as contractual commitments. The obligation commitment assists with a strategy to achieve the desired outcome within a set timeframe and reduce risk with compliance tracking. For example, payment due dates, contract terms, renewals. This object is available in API version 59.0 and later.

[SalesContractLine](#)

Stores a contract's product information, including price, quantity, and components covered. This object is available in API version 56.0 and later.

[UserEsignVendorIdentifier](#)

Used for integrating eSignature users. This object is available in API version 56.0 and later.

ClauseCatgConfiguration

Represents the configuration about the clause category that can be used in a response document by the user.

Supported Calls

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

Special Access Rules

Salesforce Org must have ClauseManagement platform license enabled. Users must have the ClauseManagementAddOn license to access this object.

Fields

Field	Details
Description	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The description about the clause category configuration.
MasterLabel	Type string Properties Create, Filter, Group, Sort, Update Description The name of the clause library category used in the configuration.
UsageType	Type picklist Properties Create, Filter, Group, Restricted picklist, Sort, Update Description Specifies the usage of the clause category. Possible values are:

Field	Details
	• <code>ContractClauseCategory</code>—Contract Clause Category • <code>DisclosureCategory</code>—Disclosure Category

Associated Objects

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

ClauseCatgConfigurationChangeEvent

Change events are available for the object.

ClauseCatgConfigurationFeed

Feed tracking is available for the object.

ClauseCatgConfigurationHistory

History is available for tracked fields of the object.

ClauseCatgConfigurationOwnerSharingRule

Sharing rules are available for the object.

ClauseCatgConfigurationShare

Sharing is available for the object.

ContextUseCaseMapping

Represents the setup configuration details such as the context definition and mapping definitions used to invoke context service APIs. This object is available in API version 61.0 and later.

Supported Calls

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

Fields

Field	Details
<code>ContextDefinitionName</code>	Type string Properties Create, Filter, Group, Sort, Update Description The name of the context definition that stores the hydration and persistence mapping details.
<code>DeveloperName</code>	Type string Properties Create, Filter, Group, Sort, Update

Field	Details
	Description The developer name of the record.
Language	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The language associated with this record. Possible values are: • da—Danish • de—German • en_US—English • es—Spanish • es_MX—Spanish (Mexico) • fi—Finnish • fr—French • it—Italian • ja—Japanese • ko—Korean • nl_NL—Dutch • no—Norwegian • pt_BR—Portuguese (Brazil) • ru—Russian • sv—Swedish • th—Thai • zh_CN—Chinese (Simplified) • zh_TW—Chinese (Traditional)
MasterLabel	Type string Properties Create, Filter, Group, Sort, Update Description The user interface label for context use case mapping.
NamespacePrefix	Type string Properties Filter, Group, Nillable, Sort

Field	Details
	Description The namespace prefix that is associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix. Limit: 15 characters. You can refer to a component in a managed package by using the <i>namespacePrefix__componentName</i> notation. The namespace prefix can have one of the following values. - 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. - 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.
MappingName	Type string Properties Create, Filter, Group, Sort, Update Description The name of the mapping that's associated with the MappingType.
MappingType	Type picklist Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update Description Specifies the mapping type used for context use case mapping. Possible values are: - Hydration - Persistence The default value is Hydration.
ReferenceObjectName	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The standard or custom source object from which the context mapping is fetched.
TargetObjectCustomFieldName	Type string

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update Description The name of the custom field in the target object that's used to link the target object with the reference object.
TargetObjectName	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The name of the standard or custom object to which context mapping from the reference object is pushed.
UseCaseType	Type picklist Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update Description Specifies the usage for which the context definition and mapping are defined. Possible values are: • <code>ContractCreationOrUpdation</code>—Create Contract or Update Contract • <code>ContractExtraction</code>—Extract Contract Details The default value is <code>ContractCreationOrUpdation</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.

ContextUseCaseMappingChangeEvent

Change events are available for the object.

ContextUseCaseMappingFeed

Feed tracking is available for the object.

ContextUseCaseMappingHistory

History is available for tracked fields of the object.

ContextUseCaseMappingOwnerSharingRule

Sharing rules are available for the object.

ContextUseCaseMappingShare

Sharing is available for the object.

ContractDocumentReview

Represents the review process-related details, such as the reference object type and review status. This object is available in API version 58.0 and later.

Supported Calls

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

Special Access Rules

ContractDocumentReview is available if your org has the DocGen platform license and related addon and user licenses.

Fields

Field	Details
ContractDocumentVersionId	Type reference Properties Create, Filter, Group, Sort, Update Description The contract document version associated with the external document. This field is a relationship field. Relationship Name ContractDocumentVersion Relationship Type Lookup Refers To ContractDocumentVersion
ExternalReviewerEmail	Type string Properties Create, Filter, Group, Sort, Update Description The email ID for the document reviewer.
ExternalReviewerIdentifier	Type string Properties Filter, Group, Nillable, Sort

Field	Details
	Description The alphanumeric external identifier for the reviewer.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description Name of contract document.
Status	Type picklist Properties Create, Filter, Group, Restricted picklist, Sort, Update Description The status of document review. The default value is <code>NotStarted</code> . Possible values are: • <code>Completed</code>—Complete • <code>InProgress</code>—In Progress • <code>NotStarted</code>—Not Started
UnresolvedCommentCount	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The number of unresolved comments in the document.

Associated Objects

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

ContractDocumentReviewChangeEvent

Change events are available for the object.

ContractDocumentReviewFeed

Feed tracking is available for the object.

ContractDocumentReviewHistory

History is available for tracked fields of the object.

ContractDocumentReviewOwnerSharingRule

Sharing rules are available for the object.

ContractDocumentReviewShare

Sharing is available for the object.

ContractDocumentVersion

Tracks contract document versions through contract lifecycle stages. 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
ContractId	Type reference Properties Create, Filter, Group, Sort Description The ID of the contract associated with the contract document version. This is a relationship field. Relationship Name Contract Relationship Type Lookup Refers To Contract
CreatedByFullName	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description User who created this contract document version.
CreationProcessType	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Indicates how the document version was created

Field	Details
	Possible values are: • BatchMode—Batch Mode • Checkout • CheckoutModify—Checkout Modify • ContractReconciliation—Contract Reconciliation • CreateContract—Create Contract • Customize • External_Online_Editor—Microsoft 365 • Generate • Import • Microsoft365ExternalReview—Non-Private External Review • Microsoft365PrivateExternalReview—Private External Review • ReconcileWord • UpdateContract
DocConversionResourceName	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The name of the resource containing the Microsoft Word document file used to generate the output web document.
DocumentTemplateId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description Document Template Identifier. This is a relationship field. Relationship Name DocumentTemplate Relationship Type Lookup Refers To DocumentTemplate
HasNewTemplateVersionAvl	Type boolean

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the latest version of the template is newer than the version used to generate the document. The default value is 'false'.
HasReconRedlinedSection	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether this contract document version contains red lines. The default value is 'false'.
HasRedlinedSection	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether this contract document version contains red lines. The default value is 'false'.
IsDocumentVersionLocked	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the document is locked. The default value is 'false'.
IsLockedByCurrentUser	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the user currently accessing the document has locked the document. The default value is 'false'.
IsSectionInfoStoredInDoc	Type boolean

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether section IDs are stored in the document (used for internal processing). The default value is 'false'.
ShouldBypassStateMdlTrnst	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the Contract State Model Transition is bypassed (true) or ignored (false). The default value is 'false'.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed this record. If this value is null, this record might only have been referenced (LastReferencedDate) and not viewed.
LockType	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the reason why the document version is locked. Possible values are: • Generate • SuperUser • User

Field	Details
LockedById	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description ID of the user who locked this version. This is a relationship field. Relationship Name LockedBy Relationship Type Lookup Refers To User
LockedByUsername	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description Name of the user who locked this version.
NonStandardSectionCount	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description Count of non-standard sections.
ReconRedlinedSectionCount	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description Total count of sections that contain red lines in the document version.
RedlinedSectionCount	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description Total count of sections that contain red lines in the document version.

Field	Details
Status	Type picklist Properties Create, Filter, Group, Restricted picklist, Sort, Update Description Contract document version status. Possible values are: • Active • Inactive • Draft
VersionNumber	Type int Properties Create, Filter, Group, idLookup, Sort, Update Description Contract document 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.

[ContractDocumentVersionChangeEvent](#)

Change events are available for the object.

[ContractDocumentVersionFeed](#)

Feed tracking is available for the object.

[ContractDocumentVersionHistory](#)

History is available for tracked fields of the object.

[ContractDocumentVersionOwnerSharingRule](#)

Sharing rules are available for the object.

[ContractDocumentVersionShare](#)

Sharing is available for the object.

ContractDocVerContentDoc

Associates a contract document version with a content document. This object is available in API version 56.0 and later.

Supported Calls

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

Fields

Field	Details
ContentDocumentId	Type reference Properties Create, Filter, Group, Sort, Update Description ID of the content document associated with the contract document version content document. This is a relationship field. Relationship Name ContentDocument Relationship Type Lookup Refers To ContentDocument
ContentVersion	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description Identifies the content version.
ContractDocumentVersionId	Type reference Properties Create, Filter, Group, Sort Description ID of the contract document version. This is a relationship field. Relationship Name ContractDocumentVersion Relationship Type Lookup Refers To ContractDocumentVersion
DocumentSourceType	Type picklist

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Source where the generated document originated. Possible values are: - Content - External The default value is 'Content'.
DocumentType	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the document type of the contract. Possible values are: - AttachedDocument—Attached Document - ComparisonDocument—Comparison Document - ContractDocument—Contract Document - ExternalReviewDocument—External Review Document - SignedDocument—Signed Document
IsGeneratedDocCheckedIn	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the generated document is checked in. The default value is 'false'.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type dateTime

Field	Details
	Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed this record. If this value is null, this record might only have been referenced (LastReferencedDate) and not viewed.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description Lists the contract document name.
RelatedCntrDocVerContentDocId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description ID of the contract document version content document that links PDF and Word documents. This is a relationship field. Relationship Name RelatedCntrDocVerContentDoc Relationship Type Lookup Refers To ContractDocVerContentDoc

Associated Objects

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

[ContractDocVerContentDocChangeEvent](#)

Change events are available for the object.

[ContractDocVerContentDocFeed](#)

Feed tracking is available for the object.

[ContractDocVerContentDocHistory](#)

History is available for tracked fields of the object.

[ContractDocVerContentDocOwnerSharingRule](#)

Sharing rules are available for the object.

[ContractDocVerContentDocShare](#)

Sharing is available for the object.

ContractDocVersionSection

Tracks contract document sections through contract lifecycle stages. 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
ContractDocumentVersionId	Type reference Properties Create, Filter, Group, Sort Description Contract Document Version to which this section belongs. This is a relationship field. Relationship Name ContractDocumentVersion Relationship Type Lookup Refers To ContractDocumentVersion
CreationProcessType	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Indicates how this section was created. Possible values are: • BatchMode • Customize • Generate • Import • ReconcileWord • UpdateContract The default value is 'Generate'.

Field	Details
DisplayHeaderFontStyle	Type textarea Properties Create, Nillable, Update Description The default font style of a section header in the generated web document.
DocumentTemplateClauseId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description Clause from which this contract section is created. This is a relationship field. Relationship Name DocumentTemplateClause Relationship Type Lookup Refers To DocumentTemplateClause
DocumentTemplateSectionId	Type reference Properties Create, Filter, Group, Sort, Update Description The template section from which this contract section is created. This is a relationship field. Relationship Name DocumentTemplateSection Relationship Type Lookup Refers To DocumentTemplateSection
HasReconciledRedlines	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the contract section contains reconciled red lines.

Field	Details
	The default value is 'false'.
IsBeginSplitSection	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates that a section split in the generated web document begins here. The default value is 'false'.
IsEndSplitSection	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates that a section split in the generated web document ends here. The default value is 'false'.
IsRedlinedSection	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the contract section contains red lines. The default value is 'false'.
IsSectionStandard	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether a section conforms to its template. The default value is 'false'.
Level	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description Level of this section in the section hierarchy.

Field	Details
ReconciledSectionContent	Type textarea Properties Create, Nillable, Update Description Section content resulting from reconciliation in the Word document.
SectionContent	Type textarea Properties Create, Update Description Section content in HTML format.
Sequence	Type int Properties Create, Filter, Group, idLookup, Sort, Update Description Section's sequence number in the contract document.
SignatureContent	Type textarea Properties Create, Nillable, Update Description DocuSign signature tokens.
SubSequence	Type int Properties Create, Filter, Group, idLookup, Nillable, Sort, Update Description The sub sequence of the section in the generated web document.
TemplateSectionContent	Type textarea Properties Create, Nillable, Update Description Original section content from the corresponding template section.

Field	Details
TokenList	Type textarea Properties Create, Nillable, Update Description Tokens in the section that map to Salesforce object fields.
Type	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Indicates section type. Possible values are: • Clause • Context • Custom • EmbeddedTemplate • Image • Item • RepeatingContent • Signature The default value is 'Context'.
XmlContent	Type textarea Properties Create, Nillable, Update Description Section content in XML format.

Associated Objects

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

ContractDocVersionSectionChangeEvent

Change events are available for the object.

ContractDocVersionSectionFeed

Feed tracking is available for the object.

ContractDocVersionSectionHistory

History is available for tracked fields of the object.

ContractDocVersionSectionOwnerSharingRule

Sharing rules are available for the object.

ContractDocVersionSectionShare

Sharing is available for the object.

ContractExtractionResult

Represents contract-specific data extracted by the Contracts AI from an uploaded PDF that's ready for review. For example, account name, owner, start date, contract name, contract record type, contract term, and clauses. Before contract record creation, users can access, review, and modify the temporarily stored information. 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
ContentDocumentId	Type reference Properties Create, Filter, Group, Sort, Update Description The content document associated with the contract. This field is a relationship field. Relationship Name ContentDocument Refers To ContentDocument
ExtractedClauseContent	Type textarea Properties Create, Nillable, Update Description The clauses that are reviewed during the extraction review process.
ExtractedClauseContentDocId	Type reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update Description The document containing clauses that exceeds 131K characters and are reviewed during the extraction review process. This field is a relationship field. Relationship Name ExtractedClauseContentDoc Refers To ContentDocument
ExtractedClauseCount	Type int Properties Filter, Group, Nillable, Sort Description The number of clauses extracted during the extraction review process.
ExtractedContractDetails	Type textarea Properties Create, Nillable, Update Description The contract fields that are extracted and reviewed during the extraction review process.
ExtractedContractFieldCount	Type int Properties Filter, Group, Nillable, Sort Description The number of contract fields extracted during the extraction review process.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type dateTime

Field	Details
	Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed this record. If this value is null, this record might only have been referenced (LastReferencedDate) and not viewed.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the contract extraction review.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description ID of the user that owns this record. This field is a polymorphic relationship field. Relationship Name Owner Refers To Group, User
Status	Type picklist Properties Create, Filter, Group, Restricted picklist, Sort, Update Description Specifies the contract extraction review status. Possible values are: • <code>ExtractionFailed</code>—Extraction Failed • <code>ExtractionInProgress</code>—Extraction In Progress • <code>ReviewCompleted</code>—Review Completed • <code>ReviewInProgress</code>—Review In Progress • <code>ReviewNotStarted</code>—Review Not Started

Associated Objects

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

ContractExtractionResultChangeEvent

Change events are available for the object.

ContractExtractionResultFeed

Feed tracking is available for the object.

ContractExtractionResultHistory

History is available for tracked fields of the object.

ContractExtractionResultOwnerSharingRule

Sharing rules are available for the object.

ContractExtractionResultShare

Sharing is available for the object.

ContractType

A sub type that groups contracts with similar characteristics, such as lifecycle states, permissions, and templates and clauses used. This object is available in API version 56.0 and later.

Supported Calls

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

Fields

Field	Details
Name	Type string Properties Create, Filter, Group, Sort, Update Description Specifies the contract type name.
IsDefault	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether this contract type is a default for the org. The default value is 'false'.

Field	Details
SubTypes	Type string Properties Create, Filter, Group, idLookup, Nillable, Sort, Update Description List of subtypes for the contract object associated with this contract type.

Associated Objects

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

ContractTypeChangeEvent

Change events are available for the object.

ContractTypeFeed

Feed tracking is available for the object.

ContractTypeHistory

History is available for tracked fields of the object.

ContractTypeOwnerSharingRule

Sharing rules are available for the object.

ContractTypeShare

Sharing is available for the object.

ContractTypeConfig

The settings that define the characteristics and behavior of all contracts of that type. This object is available in API version 56.0 and later.

Supported Calls

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

Fields

Field	Details
ConfigType	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The name of the configuration setting. Possible values are:

Field	Details
	• <code>ActivateObligationsBasedOnContractStatus</code>—Activate Obligations Based On Contract Status • <code>Append0ToAutoNbrEmbeddedSect</code>—Append Zero To Auto Number Of Embedded Section • <code>AutoGenDocOnContractCreation</code>—Auto Generate Document On Contract Creation • <code>AutoGenDocOnContractUpdate</code>—Auto Generate Document On Contract Update • <code>AutoGenerateDocFileType</code>—Auto Generate Doc File Type • <code>CheckInDocFileType</code>—Check In Document File Type • <code>CompareContractVersionsEnabled</code>—Compare Contract Versions Enabled • <code>ContractDocumentDownloadOption</code>—Contract Document Download Option • <code>ContractSignatureDeclinedSts</code>—Contract Signature Declined Status • <code>ContractSignatureExpiredStatus</code>—Contract Signature Expired Status • <code>ContractSignatureVoidedStatus</code>—Contract Signature Voided Status • <code>ContractSignedStatus</code>—Contract Signed Status • <code>CreateDocSectionsDocxTemplates</code>—Create Document Sections for Docx Templates • <code>DefaultTemplateName</code>—Default Template Name • <code>DocuSignAccountBrand</code>—DocuSign Account Brand • <code>DocuSignExpireEnabled</code>—DocuSign Expire Enabled • <code>DocuSignExpireWarning</code>—DocuSign Expire Warning • <code>DocuSignExpiresAfter</code>—DocuSign Expires After • <code>DocuSignReminderDelayInDays</code>—DocuSign Reminder Delay In Days • <code>DocuSignReminderEnabled</code>—DocuSign Reminder Enabled • <code>DocuSignReminderFrequency</code>—DocuSign Reminder Frequency • <code>DocuSignUseAccountDefaultNtfcn</code>—DocuSign Use Account Default Notification • <code>DocumentFileNameFormat</code>—Document File Name Format • <code>DocumentTemplateFilterClass</code>—Document Template Filter Class • <code>EmailNotificationOnDocumentGeneration</code>—Email Notification On Document Generation • <code>ExternalReviewRequired</code>—External Review Required • <code>ImportTargetContractStatus</code>—Import Target Contract Status • <code>InclWordTrackChgReconciliation</code>—Include Word Track Changes In Reconciliation • <code>InclWordTrackChgSectionContent</code>—Include Word Track Changes In Section Content • <code>InternalReviewRequired</code>—Internal Review Required • <code>NotifyDocTemplateVerChgStatus</code>—Notify Document Template Version Change In Status

Field	Details
	• PrivateExternalReviewCompletionSite—External Private Review Guest Site Name • TrackContractRedlines—Track Contract Redlines • WordTrackChangesDisplayColor—Word Track Changes Display Color The default value is 'ContractDocumentDownloadOption'.
ConfigValue	Type textarea Properties Create, Nillable, Update Description The value of the configuration setting specified in the Configuration Name field.
ContractTypeId	Type reference Properties Create, Filter, Group, Sort Description The ID of the related Contract Type. This is a relationship field. Relationship Name ContractType Relationship Type Lookup Refers To ContractType
UsageType	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The usage type to which this setting belongs. Possible values are: • DocumentSetting • Reconciliation • Redlining • SignatureSetting The default value is 'DocumentSetting'.

Associated Objects

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

ContractTypeConfigChangeEvent

Change events are available for the object.

ContractTypeConfigFeed

Feed tracking is available for the object.

ContractTypeConfigHistory

History is available for tracked fields of the object.

ContractTypeConfigOwnerSharingRule

Sharing rules are available for the object.

ContractTypeConfigShare

Sharing is available for the object.

DocGenerationBatchProcess

Represents a grouping of document generation requests associated with the batch document generation ID. Only one batch document generation request can be processed at a time. To create a new batch document generation record, pause or cancel the current record. This object is available in API version 58.0 and later.

Supported Calls

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

Special Access Rules

DocGenerationBatchProcess is available if your org has the DocGen platform license and related addon and user licenses.

Fields

Field	Details
Category	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The category/classification of the document generation batch process request. Possible values are: • Agreements • Proposals • Quotes

Field	Details
CompletionDate	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The date when the document generation batch process was completed.
Description	Type textarea Properties Create, Filter, Group, Nillable, Sort, Update Description The description of the document generation batch process record.
FailedRequestCount	Type int Properties Filter, Group, Nillable, Sort Description The number of failed document generation requests associated with the document generation batch process.
InProgressRequestCount	Type int Properties Filter, Group, Nillable, Sort Description The number of in progress document generation requests associated with the document generation batch process.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description The autogenerated system name for a document generation batch process record. For example, <code>BatchReq-0001</code>.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	Description The ID of the user that owns this record. This field is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
Status	Type picklist Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update Description The status of the document generation batch process request. Possible values are: • Canceled • Completed • InProgress—In Progress • New • Paused The default value is New.
SuccessfulRequestCount	Type int Properties Filter, Group, Nillable, Sort Description The number of successful document generation requests associated with the document generation batch process.
TotalRequestCount	Type int Properties Filter, Group, Nillable, Sort Description The total number of document generation requests associated with the document generation batch process.

Associated Objects

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

DocGenerationBatchProcessChangeEvent

Change events are available for the object.

DocGenerationBatchProcessFeed

Feed tracking is available for the object.

DocGenerationBatchProcessHistory

History is available for tracked fields of the object.

DocGenerationBatchProcessOwnerSharingRule

Sharing rules are available for the object.

DocGenerationBatchProcessShare

Sharing is available for the object.

DocGenBtchStsChgEvent

Represents the change in the status of the batch document generation request. A batch document generation request groups multiple document generation requests by associating the individual requests with a batch document generation ID. This object is available in API version 62.0 and later.

Supported Calls

`describeSObjects()`

Fields

Field	Details
<code>BatchProcessIdentifier</code>	Type string Properties Description The autogenerated system ID for a document generation batch process request.
<code>Status</code>	Type picklist Properties Defaulted on create, Restricted picklist Description Specifies the status of the document generation batch process request. For example, New, In Progress, Completed, Canceled, and Paused. Possible values are: • Canceled

Field	Details
	- Completed - InProgress - New - Paused The default value is New.

Associated Objects

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

[DocGenBtchStsChgEventChangeEvent](#)

Change events are available for the object.

[DocGenBtchStsChgEventFeed](#)

Feed tracking is available for the object.

[DocGenBtchStsChgEventHistory](#)

History is available for tracked fields of the object.

[DocGenBtchStsChgEventOwnerSharingRule](#)

Sharing rules are available for the object.

[DocGenBtchStsChgEventShare](#)

Sharing is available for the object.

DocGenProcStsChgEvent

Represents the change in status of a document generation request. This object is available in API version 62.0 and later.

Supported Calls

`describeSObjects()`

Fields

Field	Details
<code>DocGenProcessIdentifier</code>	Type string Properties Description The autogenerated system ID for a document generation process request.
<code>Error</code>	Type string

Field	Details
	Properties Nillable Description The details of the exception explaining why the document generation process wasn't completed.
PdfDocumentIdentifier	Type string Properties Nillable Description The ContentDocumentId of the generated PDF file.
Status	Type picklist Properties Defaulted on create, Restricted picklist Description Specifies the status of the document generation process request. For example, In Progress, Failure, Success, and Blocked. Possible values are: - Blocked - Failure - InProgress - Success - Waiting The default value is InProgress.
WordDocumentIdentifier	Type string Properties Nillable Description The ContentDocumentId of the generated DOCX file.

Associated Objects

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

DocGenProcStsChgEventChangeEvent

Change events are available for the object.

DocGenProcStsChgEventFeed

Feed tracking is available for the object.

DocGenProcStsChgEventHistory

History is available for tracked fields of the object.

DocGenProcStsChgEventOwnerSharingRule

Sharing rules are available for the object.

DocGenProcStsChgEventShare

Sharing is available for the object.

DocumentAuthoredContent

Represents the metadata of the content within the content boundary of a document such as a template or contract document. You can store metadata details of the marked clauses and sections in Salesforce with the document authored content. This object is available in API version 58.0 and later.

Supported Calls

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

Special Access Rules

DocumentAuthoredContent is available if your org has the DocGen platform license and related addon and user licenses.

Fields

Field	Details
Checksum	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The number of bits for the document authored content. Use the checksum to detect content changes.
Content	Type textarea Properties Create, Nillable, Update Description The text marked as a document authored content, such as clause content, or section content.

Field	Details
ContentGenerationSource	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The source of content creation. Possible values are: • GenAIDrafted—Gen AI Drafted • GenAIExtracted—Gen AI Extracted • MarkedContent—Marked Content • StandardContent—Standard Content
ContentType	Type picklist Properties Create, Filter, Group, Restricted picklist, Sort, Update Description The document authored content type associated with the Reference Object. For example, Document Clause, Document Section. Possible values are: • DocumentAuthoredClause—Document Authored Clause • DocumentAuthoredSection—Document Authored Section • StandardDocumentClause—Standard Document Clause
DocAuthoredContentIdentifier	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The unique reference ID (128-bit text string) that's created at the document level and used to identify the document authored content.
IsLibraryAdditionRequested	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Specifies if the promotion request is raised for the Document Authored Content The default value is <code>false</code>.

Field	Details
IsReviewed	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Specifies if the Document Authored Content is reviewed The default value is <code>false</code>.
Name	Type string Properties Create, Filter, Group, idLookup, Nillable, Sort, Update Description The name of the document authored content.
ParentContentId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The ID of parent content associated with the document authored content. For example, the ID of the section that contains clauses. This field is a relationship field. Relationship Name ParentContent Relationship Type Lookup Refers To DocumentAuthoredContent
ReferenceObjectId	Type reference Properties Create, Filter, Group, Sort Description The object associated with the document authored content. This field is a polymorphic relationship field. Relationship Name ReferenceObject Relationship Type Lookup

Field	Details
	Refers To ContractDocumentVersion, DocumentTemplate
ReferenceObjectRecordType	Type picklist Properties Create, Filter, Group, Restricted picklist, Sort, Update Description The record type of the Reference Object. For example Contract Document Version, Document Template. Possible values are: - ContractDocumentVersion—Contract Document Version - DocumentTemplate—Document Template
StandardContentObjectId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The ID of the standard Salesforce content associated with the document authored content. This field is a relationship field. Relationship Name StandardContentObject Relationship Type Lookup Refers To DocumentClause
StandardContentObjectType	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the standard Salesforce content associated with the document authored content, such as Document Clause. Possible values are: DocumentClause—Document Clause

Associated Objects

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

DocumentAuthoredContentChangeEvent

Change events are available for the object.

DocumentAuthoredContentFeed

Feed tracking is available for the object.

DocumentAuthoredContentHistory

History is available for tracked fields of the object.

DocumentAuthoredContentOwnerSharingRule

Sharing rules are available for the object.

DocumentAuthoredContentShare

Sharing is available for the object.

DocumentClause

Represents a clause that can be associated with multiple documents.

Supported Calls

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

Special Access Rules

DocumentClause is available for users with the ClauseManagement user permission set licenses. Salesforce Org must have a ClauseManagement platform license to access this object.

Fields

Field	Details
Content	Type textarea Properties Create, Nillable, Update Description Represents the HTML content of the document clause.
Description	Type textarea Properties Create, Nillable, Update

Field	Details
	Description Represents the summary of the document clause.
DocumentClauseSetId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description Represents the ID of Document Clause Group associated with Document Clause. This field is a relationship field. Relationship Name DocumentClauseSet Relationship Type Lookup Refers To DocumentClauseSet
Format	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the format for the clause such as Rich Text. Possible values are: - Non_Formatted—Non Formatted - Rich_Text—Rich Text The default value is Non_Formatted.
IsAlternateClause	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the Document Clause is main or alternate. The default value is false.
Language	Type picklist Properties Create, Filter, Group, Restricted picklist, Sort, Update

Field	Details
	Description Specifies the language of the document clause. Possible values are: • da—Danish • de—German • en_US—English • es—Spanish • es_MX—Spanish (Mexico) • fi—Finnish • fr—French • it—Italian • ja—Japanese • ko—Korean • nl_NL—Dutch • no—Norwegian • pt_BR—Portuguese (Brazil) • ru—Russian • sv—Swedish • th—Thai • zh_CN—Chinese (Simplified) • zh_TW—Chinese (Traditional)
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed this record. If this value is null, this record might only have been referenced (LastReferencedDate) and not viewed.
Name	Type string

Field	Details
	Properties Create, Filter, Group, idLookup, Sort, Update Description Specifies the name of the document template clause.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description ID of the user that owns this record. This field is a polymorphic relationship field. Relationship Name Owner Refers To Group, User
Status	Type picklist Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update Description Specifies the status of the clause such as Draft, Active, Archived. Possible values are: • <code>AI_Drafted</code>—This value is available in API version 60.0 and later. • <code>Active</code> • <code>Archived</code> • <code>Draft</code> • <code>In_Approval</code> • <code>Review_Requested</code> The default value is <code>Draft</code>.
Version	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The version number of the document clause.

Associated Objects

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

DocumentClauseChangeEvent

Change events are available for the object.

DocumentClauseFeed

Feed tracking is available for the object.

DocumentClauseHistory

History is available for tracked fields of the object.

DocumentClauseOwnerSharingRule

Sharing rules are available for the object.

DocumentClauseShare

Sharing is available for the object.

DocumentClauseSet

Represents a grouping for clauses, which can hold multiple variations of the same clause such as main clause and alternate pre-approved clauses based on language.

Supported Calls

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

Special Access Rules

DocumentClauseSet is available for users with the ClauseManagement user permission set licenses. Salesforce Org must have a ClauseManagement platform license to access this object.

Fields

Field	Details
Category	Type picklist Properties Create, Filter, Group, Restricted picklist, Sort, Update Description Specifies the category of the clause set. Possible values are: 0zMRO000000003P—Test
CategoryReferenceId	Type reference

Field	Details
	Properties Filter, Group, Nillable, Sort Description This field is used for validating category values. This field is a relationship field. Relationship Name CategoryReference Relationship Type Lookup Refers To ClauseCatgConfiguration
DefaultLanguage	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the default language of the clause set. Possible values are: • da—Danish • de—German • en_US—English • es—Spanish • es_MX—Spanish (Mexico) • fi—Finnish • fr—French • it—Italian • ja—Japanese • ko—Korean • nl_NL—Dutch • no—Norwegian • pt_BR—Portuguese (Brazil) • ru—Russian • sv—Swedish • th—Thai • zh_CN—Chinese (Simplified) • zh_TW—Chinese (Traditional)

Field	Details
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the clause set.
Status	Type picklist Properties Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort Description Specifies the status of the clause set. Possible values are: • Active • Archived • Draft The default value is <code>Draft</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.

DocumentClauseSetChangeEvent

Change events are available for the object.

DocumentClauseSetFeed

Feed tracking is available for the object.

DocumentClauseSetHistory

History is available for tracked fields of the object.

DocumentClauseSetOwnerSharingRule

Sharing rules are available for the object.

DocumentClauseSetShare

Sharing is available for the object.

DocumentEnvelope

The container for a document that is routed for signatures. 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
ContractDocumentVersionId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The ID of the Contract for the Contract Document Version to which this Document Envelope belongs. This is a relationship field. Relationship Name ContractDocumentVersion Relationship Type Lookup Refers To ContractDocumentVersion
DeliveredDateTime	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The timestamp at which the document was most recently viewed by all recipients.
EnvelopeIdentifier	Type string Properties Create, Filter, Group, idLookup, Nillable, Sort, Update Description The identifier of this Document Envelope.
EnvelopeMessageContent	Type textarea Properties Create, Nillable, Update Description The body of the email sent to the recipient.

Field	Details
EnvelopeSubject	Type string Properties Create, Filter, Nillable, Sort, Update Description The subject of the email sent to the recipient.
EnvelopeUri	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The URI of this Document Envelope.
FinalStatusDateTime	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The time-stamp at which this Document Envelope was completed.
FinalStatusReason	Type string Properties Create, Filter, Nillable, Sort, Update Description The final status reason of this Document Envelope.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of this Document Envelope.
ReferenceObjectId	Type reference Properties Create, Filter, Group, Sort, Update Description The ID of the object associated with this Document Envelope.

Field	Details
	This is a polymorphic relationship field. Relationship Name ReferenceObject Relationship Type Lookup
Status	Type picklist Properties Create, Filter, Group, Sort, Update Description The status of this Document Envelope. Possible values are: • Sent • Delivered • Declined • Voided • Completed
StatusChangeDateTime	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The most recent timestamp at which the Status of this Document Envelope was updated.
Vendor	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The name of the online signature vendor.

Associated Objects

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

DocumentEnvelopeChangeEvent

Change events are available for the object.

DocumentEnvelopeFeed

Feed tracking is available for the object.

DocumentEnvelopeHistory

History is available for tracked fields of the object.

DocumentEnvelopeOwnerSharingRule

Sharing rules are available for the object.

DocumentEnvelopeShare

Sharing is available for the object.

DocumentGenerationProcess

Supports server-side document generation requests and responses. 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
DataRaptorInput	Type textarea Properties Create, Nillable, Update Description Specifies the input json to the Custom Class associated to the Document Template.
DocGenApiVersionType	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the API version to use for document generation. Possible values include <code>Basic</code> and <code>Advanced</code>. The default value is <code>Basic</code>. Available in API version 62.0
DocumentTemplateId	Type string Properties Create, Filter, Group, idLookup, Nillable, Sort, Update Description ID of the document template for operations like cloning or creating a new version.

Field	Details
	Available in API version 62.0.
DocumentInputType	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The input type of the document. Possible values are: - DocumentTemplate—Document Template - None The default value is None.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description Represents an automatically generated system name. Example: Request-001.
HasDocGenFontSource	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the document template font (true) or a rich text editor font (false) is used for rendering values during document generation. The default value is false.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort

Field	Details
	Description The timestamp for when the current user last viewed this record. If this value is null, this record might only have been referenced (LastReferencedDate) and not viewed.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description ID of the user that owns this record. This field is a polymorphic relationship field. Relationship Name Owner Refers To Group, User
PdfDocIdentifiersList	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The PDF document IDs of the contract documents to be converted into a single .pdf file. You can combine upto ten PDFs into a single file. Make sure the content version ID for each PDF file is 18 characters long. Available in API version 63.0 and later.
ReferenceObject	Type string Properties Create, Filter, Group, idLookup, Nillable, Sort, Update Description Refers to the object to which generated document is attached.
RequestText	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description Requests parameters that are passed in the payload.

Field	Details
ResponseText	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description Requests parameters that are passed in the payload.
SourceObjectId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the object from which the document generation request is created. For example, Contract Document Version. This field is a polymorphic relationship field. Relationship Name SourceObject Relationship Type Lookup Refers To ContractDocumentVersion
Status	Type picklist Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update Description Contains the status of the request. Possible values are: • Failure • Success • InProgress The default value is InProgress.
TokenData	Type textarea Properties Create, Nillable, Update Description Contains JSON data with information that users enter in the new, generated document.

Field	Details
TokenDataContentDocument	Type reference Properties Create, Filter, Group, Nillable, Sort Description The Token Data Content Document associated with the Document Generation Process. Contains information that users enter in the new generated document.
Type	Type picklist Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update Description Type of service requested for the document for generating and converting to PDF. Possible values are: • Generate • Convert • GenerateAndConvert • MergePDF The default value is Generate.

DocumentGenerationSetting

Represents an org's settings for automatic document generation from templates. This object is available in API version 54.0 and later.

Supported Calls

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

Special Access Rules

DocumentGenerationSetting is available if your org has the DocGen platform license and related addon and user licenses.

Fields

Field	Details
BatchDocGrnMptLimitPerHour	Type percent Properties Create, Defaulted on create, Filter, Nillable, Sort, Update

Field	Details
	Description The maximum percentage of hourly server-side document generation requests used for batch processing. Available in version 58.0 and later.
DeveloperName	Type string Properties Create, Filter, Group, Sort, Update Description Required. The unique name of the object in the API. This name can contain only underscores and alphanumeric characters and must be unique in your organization. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.
DocumentTemplateLibraryName	Type string Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update Description The name of the library associated with the document template.
GenerationMechanism	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The location where the web document is generated. Possible values are: • <code>ClientSide</code>—Client-Side • <code>ServerSide</code>—Server-Side The default value is <code>ClientSide</code>.
GuestAccessNamedCredential	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The named credential that lets guest users generate documents.

Field	Details
InProgDocGenRqstTmot	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The time interval (in hours) after which InProgress DocumentGenerationProcess records (single point or batch request) are terminated and the request status is updated to Failed. Specify a valid whole number between 1 and 24. The default value is set to 6.
IsBatchDocGnrnEnabled	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether server-side document generation requests are queued and processed within the hourly batch document generation limit. The default value is <code>false</code>. Available in version 58.0 and later.
IsInProgRqstTmotEnab	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the InProgress DocGen Request Time Out (hrs) is enabled (true) or not (false). The default value is <code>false</code>.
IsServerSideDocGenEnabled	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether side server document generation is enabled <code>true</code> or not <code>false</code> for this org. The default value is <code>false</code>.
Language	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update

Field	Details
	Description The language of the label in the user interface. Possible values are: • da—Danish • de—German • en_US—English • es—Spanish • es_MX—Spanish (Mexico) • fi—Finnish • fr—French • it—Italian • ja—Japanese • ko—Korean • nl_NL—Dutch • no—Norwegian • pt_BR—Portuguese (Brazil) • ru—Russian • sv—Swedish • th—Thai • zh_CN—Chinese (Simplified) • zh_TW—Chinese (Traditional)
MasterLabel	Type string Properties Create, Filter, Group, Sort, Update Description The user interface label for document generation setting.
NamespacePrefix	Type string Properties Filter, Group, Nillable, Sort Description The namespace prefix that is associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix. Limit: 15 characters. You can refer to a component in a managed package by using the <i>namespacePrefix__componentName</i> notation. The namespace prefix can have one of the following values.

Field	Details
	- 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. - 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.
<code>PreviewType</code>	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The type of viewer that's used to view the generated web document. Possible values are: <code>PDF</code> <code>Thumbnail</code> The default value is <code>PDF</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.

DocumentGenerationSettingChangeEvent

Change events are available for the object.

DocumentGenerationSettingFeed

Feed tracking is available for the object.

DocumentGenerationSettingHistory

History is available for tracked fields of the object.

DocumentGenerationSettingOwnerSharingRule

Sharing rules are available for the object.

DocumentGenerationSettingShare

Sharing is available for the object.

DocumentTemplate

Represents information about dynamic document generation. 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
CustomClassName	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The name of the custom class that provides token values required by the template for document generation.
DefaultFontStyle	Type textarea Properties Create, Nillable, Update Description The default font style for a web document template.
DocumentConversionResourceName	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The name of the resource containing the Microsoft Word document file used to generate the output web document.
DocumentGenerationMechanism	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the method for generating the document. Possible values are: • <code>ClientSide</code> • <code>ServerSide</code> The default value is <code>ClientSide</code>.

Field	Details
ExtractOmniDataTransformName	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The name of the OmniDataTransform bundle of the extract type.
GlobalKey	Type string Properties Create, Filter, Group, idLookup, Nillable, Sort, Update Description The unique ID used when migrating the document template between Salesforce orgs. This field is specifically used for import and export operations in managed packages.
HasBatchableSection	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the template has one or more batchable sections. The default value is <code>false</code>.
IsActive	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the document template is active. The default value is <code>false</code>.
IsSectionProcessed	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the contract boundary sections of the document template are processed. The default value is <code>false</code>.
LastEmbeddedTplSectionKey	Type string

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update Description The last auto generated key of the embedded template section.
MapperOmniDataTransformName	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The name of the OmniDataTransform bundle of the mapper type.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the document template.
Namespace	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description Indicates whether the document template was exported using the industry-specific templates datapack (namespace prefix), or a user manually created or cloned an exported document template (blank). The namespace prefix is associated with the industry license. For example, <code>insurance_fsc_ise</code>.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The ID of the document template. This field is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup

Field	Details
	Refers To Group, User
RecordTypeId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description ID of the record type associated with this object. This field is a relationship field. Relationship Name RecordType Relationship Type Lookup Refers To RecordType
SectionHeaderFontStyle	Type textarea Properties Create, Nillable, Update Description The field to select font style for the section header of the web document template.
SectionHeaderFontStyleValue	Type textarea Properties Create, Nillable, Update Description The value of the font style selected for the section header of the web document template.
ShouldDisplayUnmappedToken	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the tokens without runtime values must be displayed. The default value is <code>false</code> .
ShouldExtractEmbeddedImplToken	Type boolean

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether tokens from all the templates embedded within the document template must be extracted. If this field's value is yes, the embedded template tokens are extracted into the mapping omnidatatransform associated with the template. The default value is <code>false</code>.
Status	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the status of the document template. Possible values are: • Active • Archived • Draft
TargetTokenItemObject	Type multipicklist Properties Create, Filter, Nillable, Update Description The line item object of the target token object associated with the document template, that's used for mapping tokens. Possible values are: • OpportunityLineItem • OrderLineItem • QuoteLineItem
TargetTokenObject	Type multipicklist Properties Create, Filter, Nillable, Update Description The object associated with the document template that's used for mapping tokens. Possible values are: • Contract • Opportunity

Field	Details
	- Order - Quote
TokenList	Type textarea Properties Create, Nillable, Update Description The list of tokens used to define a section condition.
TokenMappingMethodType	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the processing method for the data which can come from same source object. Possible values are: - CustomClass - OmniDataTransform
TokenMappingType	Type picklist Properties Create, Filter, Group, Restricted picklist, Sort, Update Description Specifies the mapping type for tokens of the document template. Possible values are: - JSON - SalesforceObject
Type	Type picklist Properties Create, Filter, Group, Restricted picklist, Sort, Update Description Specifies the type of document template. Possible values are: - Web - MicrosoftWord - Microsoft365Word

Field	Details
	MicrosoftPowerpoint
UniqueName	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The unique name for the document template.
UsageType	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the document template usage. For example, the Contract Lifecycle Management option allows you to use the document template only for contract document generation. The default value is Contract_Lifecycle_Management.
VersionNumber	Type int Properties Create, Filter, Group, idLookup, Nillable, Sort, Update Description The version number of the document template.
XmlRelationshipMetadata	Type textarea Properties Create, Nillable, Update Description The WML relationship metadata used to process Microsoft Word documents.

Associated Objects

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

DocumentTemplateChangeEvent

Change events are available for the object.

DocumentTemplateFeed

Feed tracking is available for the object.

DocumentTemplateHistory

History is available for tracked fields of the object.

DocumentTemplateOwnerSharingRule

Sharing rules are available for the object.

DocumentTemplateShare

Sharing is available for the object.

DocumentTemplateConfig

Represents the shadow object that supports migration of document templates between environments. The Developer field in the shadow object references the UniqueName field in the document template object and is used to retrieve the document template details. For internal use only. This object is available in API version 58.0 and later.

Supported Calls

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

Fields

Field	Details
DeveloperName	Type string Properties Create, Filter, Group, Sort, Update Description 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 organization. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.
Language	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The language of the label in the user interface. Possible values are: • da—Danish • de—German • en_US—English • es—Spanish • es_MX—Spanish (Mexico)

Field	Details
	• <code>fi</code>—Finnish • <code>fr</code>—French • <code>it</code>—Italian • <code>ja</code>—Japanese • <code>ko</code>—Korean • <code>nl_NL</code>—Dutch • <code>no</code>—Norwegian • <code>pt_BR</code>—Portuguese (Brazil) • <code>ru</code>—Russian • <code>sv</code>—Swedish • <code>th</code>—Thai • <code>zh_CN</code>—Chinese (Simplified) • <code>zh_TW</code>—Chinese (Traditional)
NamespacePrefix	Type string Properties Filter, Group, Nillable, Sort Description The namespace prefix that is associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix. Limit: 15 characters. You can refer to a component in a managed package by using the <code>namespacePrefix__componentName</code> notation. The namespace prefix can have one of the following values. • 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. • 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.
MasterLabel	Type string Properties Create, Filter, Group, Sort, Update Description Required The user interface label for the document template config.

Associated Objects

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

DocumentTemplateConfigChangeEvent

Change events are available for the object.

DocumentTemplateConfigFeed

Feed tracking is available for the object.

DocumentTemplateConfigHistory

History is available for tracked fields of the object.

DocumentTemplateConfigOwnerSharingRule

Sharing rules are available for the object.

DocumentTemplateConfigShare

Sharing is available for the object.

DocumentTemplateSection

Represents a section in a document template. A document template section can be a clause, image, context, embedded template, or signature. This object is available in API version 52.0 and later.

Supported Calls

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

Special Access Rules

DocumentTemplateSection is available if your org has the DocGen platform license and related addon and user licenses.

Fields

Field	Details
AccessType	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The type of access for the section in a generated document. Possible values are: • <code>Editable</code> • <code>ReadOnly</code>—Read Only The default value is <code>Editable</code>.

Field	Details
DisplayConditionExpression	Type textarea Properties Create, Nillable, Update Description The condition that controls the display of a section in the document template.
DocumentTemplateClauseId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The ID of the document template clause association with the section. This field is a relationship field. Relationship Name DocumentTemplateClause Relationship Type Lookup Refers To DocumentClause
DocumentTemplateId	Type reference Properties Create, Filter, Group, Sort Description The ID of the document template associated with the section. This field is a relationship field. Relationship Name DocumentTemplate Relationship Type Lookup Refers To DocumentTemplate
EmbeddedDocumentTemplateId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The ID of the embedded document template associated with the section.

Field	Details
	This field is a relationship field. Relationship Name EmbeddedDocumentTemplate Relationship Type Lookup Refers To DocumentTemplate
EmbeddedKey	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description
HasSectionNumberReset	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the section number must be reset in the generated web document. The default value is <code>false</code>.
IsBatchable	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the section must be generated using a batch job. The default value is <code>false</code>.
IsDisplayOnNewPage	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates if the section must be displayed on a new page in the generated web document. The default value is <code>false</code>.
IsNewLineAfterSectionEnabled	Type boolean

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether a line should get added after the section in a generated web document. The default value is <code>false</code>.
IsSectionNumberDisplayEnabled	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the section number must be displayed on the generated web document. The default value is <code>false</code>.
IsTableHeaderRepeatable	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the table header must be displayed on every page in the generated web document. The default value is <code>false</code>.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the section in a document template.
ReferenceClassName	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The name of the custom class associated with the section.
SectionContent	Type textarea Properties Create, Nillable, Update

Field	Details
	Description The content of the section in either HTML or JSON format.
SectionSequenceNumber	Type double Properties Create, Filter, Nillable, Sort, Update Description The sequence of the section in the generated web document.
SectionType	Type picklist Properties Create, Filter, Group, Restricted picklist, Sort, Update Description The type of section in a document template. Possible values are: • Clause • Context • Custom • EmbeddedTemplate—Embedded Template • Image • Item • RepeatingContent—Repeating Content • Signature
SectionTypeItemFontStyle	Type textarea Properties Create, Nillable, Update Description The field to select font style for the display of item section type in the generated web document.
SectionTypeItemFontValue	Type textarea Properties Create, Nillable, Update Description The value of the font style selected for the display of the item section type in the generated web document.

Field	Details
SectionTypeSignatureContent	Type textarea Properties Create, Nillable, Update Description The tokens used for integration with eSignature applications.
ShouldDisplayHeaderContentInline	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the section content must be displayed inline with the section header in the generated web document. The default value is <code>false</code>.
ShouldDisplayHeaderName	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the section name must be displayed in the generated web document. The default value is <code>false</code>.
ShouldGenerateEmbeddedKey	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the embedded key should be generated in the generated web document. The default value is <code>false</code>.
TokenList	Type textarea Properties Create, Nillable, Update Description The list of tokens used in a section of the generated web document.
TotalSectionConditionCount	Type int

Field	Details
	Properties Filter, Group, Nillable, Sort
	Description The number of display conditions for the section in a document template. This field is a calculated field.

Associated Objects

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

DocumentTemplateSectionChangeEvent

Change events are available for the object.

DocumentTemplateSectionFeed

Feed tracking is available for the object.

DocumentTemplateSectionHistory

History is available for tracked fields of the object.

DocumentTemplateSectionOwnerSharingRule

Sharing rules are available for the object.

DocumentTemplateSectionShare

Sharing is available for the object.

ESignatureConfig

The settings for integrating with external eSignature providers. This object is available in API version 56.0 and later.

Supported Calls

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

Fields

Field	Details
ConfigType	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update
	Description Indicates the configured setting. Possible values are: AnchorString

Field	Details
	• <code>SignerRoles</code> • <code>SyncFileSizeLimit</code> • <code>CalloutTimeout</code> • <code>EnvelopesLastPollDate</code> • <code>CalloutNamedCredential</code> • <code>eSignVendorAccountId</code> • <code>RecipientsCustomClass</code> • <code>DocumentsCustomClass</code> The default value is 'AnchorString'.
ConfigValue	Type string Properties Create, Filter, Group, Sort, Update Description Value of the configured setting.
Description	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The description for the configuration setting.
GroupType	Type picklist Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update Description The group to which the configuration setting belongs. Possible values are: • <code>AnchorTabSetting</code> • <code>EnvelopeObjectLimits</code> • <code>CalloutConfigurationSetup</code> • <code>Envelope</code> • <code>eSignVendorAccount</code> • <code>CustomClassSetting</code>
Vendor	Type picklist

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update
	Description The provider type to which the configuration setting belongs. Currently only DocuSign is supported.

Associated Objects

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

ESignatureConfigChangeEvent

Change events are available for the object.

ESignatureConfigFeed

Feed tracking is available for the object.

ESignatureConfigHistory

History is available for tracked fields of the object.

ESignatureConfigOwnerSharingRule

Sharing rules are available for the object.

ESignatureConfigShare

Sharing is available for the object.

ESignatureEnvelopeConfig

The notification-specific settings for integrating with external eSignature providers. This object is available in API version 56.0 and later.

Supported Calls

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

Fields

Field	Details
ExpirationPeriod	Type int
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The expiration period for signing.
ExpirationWarningPeriod	Type int

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update Description The number of days before expiration for warning notifications.
FirstReminderPeriod	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The number of days between envelope delivery and the first reminder email.
IsExpirationEnabled	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether expiration is enabled. The default value is 'false'.
IsReminderEnabled	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether reminders are enabled. The default value is 'false'.
IsVendorDefaultNtfcnEnabled	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the envelope uses account default notification settings. The default value is 'false'.
ReminderIntervalPeriod	Type int Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The interval in days between reminder emails.
TargetObjectName	Type picklist Properties Create, Filter, Group, Restricted picklist, Sort, Update Description The object to which the eSignature applies, such as an Opportunity, Quote, or Order.
Vendor	Type picklist Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update Description The eSignature provider, for example DocuSign.
VendorAccountIdentifier	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The eSignature branding identifier.

Associated Objects

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

ESignatureEnvelopeConfigChangeEvent

Change events are available for the object.

ESignatureEnvelopeConfigFeed

Feed tracking is available for the object.

ESignatureEnvelopeConfigHistory

History is available for tracked fields of the object.

ESignatureEnvelopeConfigOwnerSharingRule

Sharing rules are available for the object.

ESignatureEnvelopeConfigShare

Sharing is available for the object.

ExternalDocStorageConfig

Represents a collection of fields to configure the external document storage for an object. It includes details such as location, path, and named credentials. For example, OneDrive is defined as an External Document Storage and is associated with the Salesforce Contract object.

Supported Calls

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

Fields

Field	Details
DocumentPath	Type textarea Properties Create, Update Description Specifies the path from the root in the external storage where documents are stored.
ExternalDocStorageIdentifier	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the ID of the external document storage.
NamedCredentialId	Type reference Properties Create, Filter, Group, Sort, Update Description The Named Credential associated with the External Document Storage Configuration. A named credential can be specified as an endpoint to simplify the setup of authenticated callouts. This field is a relationship field. Relationship Name NamedCredential Relationship Type Lookup Refers To NamedCredential

Field	Details
RecordTypeId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The Record Type associated with the Reference Object. This field is a relationship field. Relationship Name RecordType Relationship Type Lookup Refers To RecordType
StorageDriveType	Type picklist Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update Description Specifies the external document storage drive. For example, Microsoft OneDrive. Possible values are: • <code>MicrosoftOneDrive</code>—Microsoft OneDrive The default value is <code>MicrosoftOneDrive</code>.
TargetObject	Type picklist Properties Create, Filter, Group, Restricted picklist, Sort, Update Description Specifies the object associated with the external document storage. For example, Document Template, Contract, All. Possible values are: • <code>All</code> • <code>Contract</code> • <code>DocumentTemplate</code>—Document Template

Associated Objects

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

ExternalDocStorageConfigChangeEvent

Change events are available for the object.

ExternalDocStorageConfigFeed

Feed tracking is available for the object.

ExternalDocStorageConfigHistory

History is available for tracked fields of the object.

ExternalDocStorageConfigOwnerSharingRule

Sharing rules are available for the object.

ExternalDocStorageConfigShare

Sharing is available for the object.

GeneratedDocumentSection

Represents a section of a generated document. This object is available in API version 60.0 and later.

Supported Calls

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

Special Access Rules

Fields

Field	Details
<code>DisplayHeaderFontStyle</code>	Type textarea Properties Create, Nillable, Update Description Default font style of a section header in the generated web document.
<code>DocumentTemplateClauseId</code>	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description ID of the document template clause association with the section. This field is a relationship field. Relationship Name DocumentTemplateClause

Field	Details
	Refers To DocumentClause
DocumentTemplateSectionId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description ID of the associated document template section. This field is a relationship field. Relationship Name DocumentTemplateSection Refers To DocumentTemplateSection
GeneratedDocumentId	Type reference Properties Create, Filter, Group, Sort Description ID of the generated document associated with the section. This field is a relationship field. Relationship Name GeneratedDocument Relationship Type Master-detail Refers To GeneratedDocument (the master object)
IsBeginSplitSection	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the section must be split in the generated web document. The default value is <code>false</code> .
IsEndSplitSection	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	Description Indicates whether the section split must end in the generated web document. The default value is <code>false</code> .
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed this record. If this value is null, this record might only have been referenced (LastReferencedDate) and not viewed.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the section in the generated web document.
SectionContent	Type textarea Properties Create, Nillable, Update Description The section content that's stored as HTML.
SectionOrder	Type double Properties Create, Filter, Nillable, Sort, Update Description The order of the section in the section's hierarchy.
SectionTypeSignatureContent	Type textarea

Field	Details
	Properties Create, Nillable, Update Description The tokens used for integration with eSignature applications.
SplitSectionSequenceNumber	Type double Properties Create, Filter, Nillable, Sort, Update Description The sequence of the section that's split in the generated web document.
TemplateSectionContent	Type textarea Properties Create, Nillable, Update Description The content of the section in the original format.
TokenList	Type textarea Properties Create, Nillable, Update Description The list of tokens used to define a section condition in the generated web document.
XmlContent	Type textarea Properties Create, Nillable, Update Description The content of the section in the generated web document in the XML format.

ObjectStateActionDefinition

Represents the link between the object state definition and object state transition based on a defined action.

Supported Calls

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

Fields

Field	Details
ActionType	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the action type for the object state action definition, whether it's Apex or Reference Object. Possible values are: • Apex • ReferenceObject—Reference Object
DisplayLabel	Type string Properties Create, Filter, Group, Sort, Update Description The display name of the object state action definition.
InvocableClassName	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The name of the Apex invocable class.
InvocableMethodName	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The name of the Apex invocable class method.
IsSystem	Type boolean Properties Defaulted on create, Filter, Group, Sort Description Indicates whether the action is provided by the Salesforce (True) application or is a custom action (False). The field is uneditable.

Field	Details
Name	Type string Properties Create, Filter, Group, idLookup, Sort Description The API name of the object state action definition.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The name of the user who creates the object state action definition. This field is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
ReferenceObjectId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The Reference Object associated with the Object State Action Definition. This field is a relationship field. Relationship Name ReferenceObject Relationship Type Lookup Refers To OmniProcess

Associated Objects

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

ObjectStateActionDefinitionChangeEvent

Change events are available for the object.

ObjectStateActionDefinitionFeed

Feed tracking is available for the object.

ObjectStateActionDefinitionHistory

History is available for tracked fields of the object.

ObjectStateActionDefinitionOwnerSharingRule

Sharing rules are available for the object.

ObjectStateActionDefinitionShare

Sharing is available for the object.

ObjectStateTransitionAction

Represents a junction between object state transition and object state action definition. State transition determines the valid transition of an object from one state to another and the state action determines which action triggers which state transition.

Supported Calls

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

Fields

Field	Details
DisplaySequence	Type int Properties Create, Filter, Group, Sort, Update Description Determines the display order of the object state action for the associated state transition. Supports a whole number that's greater than 0 to define the order.
IsActive	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the object state action definition for the specified object state transition is active (True) or not (False). The default value is <code>false</code> .
Name	Type string

Field	Details
	Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the object state action transition.
ObjectStateActionDefinitionId	Type reference Properties Create, Filter, Group, Sort, Update Description The object state action definition associated with the record. This field is a relationship field. Relationship Name ObjectStateActionDefinition Relationship Type Lookup Refers To ObjectStateActionDefinition
ObjectStateDefinitionId	Type reference Properties Create, Filter, Group, Sort, Update Description The object state definition associated with the record. This field is a relationship field. Relationship Name ObjectStateDefinition Relationship Type Lookup Refers To ObjectStateDefinition
ObjectStateTransitionId	Type reference Properties Create, Filter, Group, Sort, Update Description The object state definition transition with the record. This field is a relationship field.

Field	Details
	Relationship Name ObjectStateTransition Relationship Type Lookup Refers To ObjectStateTransition
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description This field is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User

Associated Objects

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

ObjectStateTransitionActionChangeEvent

Change events are available for the object.

ObjectStateTransitionActionFeed

Feed tracking is available for the object.

ObjectStateTransitionActionHistory

History is available for tracked fields of the object.

ObjectStateTransitionActionOwnerSharingRule

Sharing rules are available for the object.

ObjectStateTransitionActionShare

Sharing is available for the object.

Obligation

Represents an obligation between parties to fulfill agreed conditions, such as contractual commitments. The obligation commitment assists with a strategy to achieve the desired outcome within a set timeframe and reduce risk with compliance tracking. For example, payment due dates, contract terms, renewals. 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 ObligationManagement permission license.

Fields

Field	Details
AssigneeUserId	Type reference Properties Create, Filter, Group, Sort, Update Description The ID of the assignee user associated with the obligation. This field is a relationship field. Relationship Name AssigneeUser Relationship Type Lookup Refers To User
Description	Type textarea Properties Create, Nillable, Update Description The description of the obligation.
EndDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The end date of the obligation.
Name	Type string

Field	Details
	Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the obligation.
OtherPartyAccountId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The ID of the other party account associated with the obligation. This field is a relationship field. Relationship Name OtherPartyAccount Relationship Type Lookup Refers To Account
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The ID of the user that owns this record. This field is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
Party	Type picklist Properties Create, Filter, Group, Restricted picklist, Sort, Update Description The party who executes or delivers the obligation. The default value is <code>First_Party</code>. Possible values are:

Field	Details
	- FIRST_PARTY - OTHER_PARTY
ReferenceContractId	Type reference Properties Filter, Group, Nillable, Sort Description The contract associated with the obligation. This field is a relationship field. Relationship Name ReferenceContract Relationship Type Lookup Refers To Contract
ReferenceObjectId	Type reference Properties Create, Filter, Group, Sort, Update Description The object associated with the obligation. For example, Contract. This field is a relationship field. Relationship Name ReferenceObject Relationship Type Lookup Refers To Contract
StartDate	Type date Properties Create, Filter, Group, Sort, Update Description The start date of the obligation.
State	Type picklist

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The start date of the obligation. Possible values are: • Active • Expired • InActive—Inactive • OnHold—On Hold The default value is OnHold.
Status	Type picklist Properties Create, Filter, Group, Sort, Update Description Specifies the status of the obligation. Possible values are: • Compliant—Compliant • Non Compliant—Non Compliant • At Risk—At Risk • None—None The default value is Compliant.
StatusChangeReason	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The reason to change the obligation status.
Type	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The type of Obligation. For example, Manufacturing Obligation, or Payment Obligation.

Associated Objects

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

ObligationChangeEvent

Change events are available for the object.

ObligationFeed

Feed tracking is available for the object.

ObligationHistory

History is available for tracked fields of the object.

ObligationOwnerSharingRule

Sharing rules are available for the object.

ObligationShare

Sharing is available for the object.

SalesContractLine

Stores a contract's product information, including price, quantity, and components covered. 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
ContractId	Type reference Properties Create, Filter, Group, Sort Description Parent contract identifier. This is a relationship field. Relationship Name Contract Relationship Type Lookup Refers To Contract

Field	Details
Description	Type textarea Properties Create, Nillable, Update Description Description of the contract line item.
EffectiveEndDateTime	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description End date and time for the line item.
EffectiveStartDateTime	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description Start date and time for the line item.
LineItemNumber	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description Indicates the line item number.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description Name of the contract line item.
OpportunityProductId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description ID of the associated OpportunityLineItem.

Field	Details
	This is a relationship field. Relationship Name OpportunityProduct Relationship Type Lookup Refers To OpportunityLineItem
OrderProductId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description ID of the associated OrderItem. This is a relationship field. Relationship Name OrderProduct Relationship Type Lookup Refers To OrderItem
OriginalLineItemId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description ID of the original line item that this line item references (for example if this line item is due to a contract amendment). This is a relationship field. Relationship Name OriginalLineItem Relationship Type Lookup Refers To SalesContractLine
Product2Id	Type reference Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Product ID associated with the line item. This is a relationship field. Relationship Name Product2 Relationship Type Lookup Refers To Product2
ProductCode	Type textarea Properties Create, Nillable, Update Description Product code associated with the line item.
Quantity	Type double Properties Create, Filter, Nillable, Sort, Update Description Product quantity associated with the line item.
Status	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Status of the contract line item. Possible values are: • Active • Inactive
TotalPrice	Type currency Properties Create, Filter, Nillable, Sort, Update Description Total price of the line item.

Field	Details
UnitPrice	Type currency Properties Create, Filter, Nillable, Sort, Update Description Unit price of the line item.

Associated Objects

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

SalesContractLineChangeEvent

Change events are available for the object.

SalesContractLineFeed

Feed tracking is available for the object.

SalesContractLineHistory

History is available for tracked fields of the object.

SalesContractLineOwnerSharingRule

Sharing rules are available for the object.

SalesContractLineShare

Sharing is available for the object.

UserEsignVendorIdentifier

Used for integrating eSignature users. 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
ExternalUserIdentifier	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The user identifier used by the eSignature provider.

Field	Details
UserId	Type reference Properties Create, Filter, Group, Sort, Update Description The Salesforce user identifier. This is a relationship field. Relationship Name User Relationship Type Lookup Refers To User
Vendor	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The eSignature provider. Possible values are: • DocuSign The default value is 'DocuSign'.
VendorType	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Indicates the type of vendor. Possible values are: • Internal • eSignature The default value is 'eSignature'.

Associated Objects

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

UserEsignVendorIdentifierChangeEvent

Change events are available for the object.

UserEsignVendorIdentifierFeed

Feed tracking is available for the object.

UserEsignVendorIdentifierHistory

History is available for tracked fields of the object.

UserEsignVendorIdentifierOwnerSharingRule

Sharing rules are available for the object.

UserEsignVendorIdentifierShare

Sharing is available for the object.

Apex Reference

This Apex reference goes into detail about the built-in Apex classes and interfaces grouped by namespace for Salesforce Contracts.

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

[ind_docgen_api Namespace](#)

The `ind_docgen_api` namespace provides class for scheduling Envelope Status updates.

[industries_clm Namespace](#)

The `industries_clm` namespace allows user to provide custom logic for any specific task permitted by salesforce. For example, Custom Document Template Filtering, which allows user to provide the filtering logic on Document tab under Contract.

[industries_docgen Namespace](#)

The `industries_docgen` namespace provides classes and methods for document generation and permission management in Salesforce Industries.

ind_docgen_api Namespace

The `ind_docgen_api` namespace provides class for scheduling Envelope Status updates.

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

[EnvelopeStatusScheduler Class](#)

The `ind_docgen_api.EnvelopeStatusScheduler` class schedules Envelope Status updates.

[OpenInterface Interface](#)

The `OpenInterface` provides user the capability to provide custom logic for task permitted by Salesforce.

EnvelopeStatusScheduler Class

The `ind_docgen_api.EnvelopeStatusScheduler` class schedules Envelope Status updates.

Namespace

[ind_docgen_api](#)

Example

```
ind_docgen_api.EnvelopeStatusScheduler envelopeScheduler = new
ind_docgen_api.EnvelopeStatusScheduler();
System.schedule('Update Docusign Envelope Job 1', '0 0 * * * ?', envelopeScheduler);
System.schedule('Update Docusign Envelope Job 2', '0 15 * * * ?', envelopeScheduler);
System.schedule('Update Docusign Envelope Job 3', '0 30 * * * ?', envelopeScheduler);
System.schedule('Update Docusign Envelope Job 4', '0 45 * * * ?', envelopeScheduler);
```

[EnvelopeStatusScheduler Methods](#)

EnvelopeStatusScheduler Methods

The following are methods for `EnvelopeStatusScheduler`.

[execute\(ctx\)](#)

Executes the scheduled Apex job for Envelope Status Updates.

execute (ctx)

Executes the scheduled Apex job for Envelope Status Updates.

Signature

```
public void execute(System.SchedulableContext ctx)
```

Parameters

ctx

Type: `System.SchedulableContext`

Contains the job ID.

Return Value

Type: `void`

OpenInterface Interface

The `OpenInterface` provides user the capability to provide custom logic for task permitted by Salesforce.

Namespace

[ind_docgen_api](#)

[OpenInterface Methods](#)

[OpenInterface Example Implementation](#)

OpenInterface Methods

The following are methods for `OpenInterface`.

`invokeMethod(var1, var2, var3)`

Invokes method based on the use-case.

`invokeMethod(var1, var2, var3)`

Invokes method based on the use-case.

Signature

```
public Boolean invokeMethod(String var1, Map<String, ANY> var2, Map<String, ANY> var3)
```

Parameters

var1

Type: String

Contains the name of the method that is supposed to be implemented from invoke method.

var2

Type: Map<String, ANY>

Contains the inputs as per the use-case.

var3

Type: Map<String, ANY>

Returns the output as per the use-case.

Return Value

Type: Boolean

true or false

OpenInterface Example Implementation

This is an example implementation of the `ind_docgen_api.OpenInterface` interface.

```
global class TestTF implements ind_docgen_api.OpenInterface {
    public Boolean invokeMethod(String methodName, Map<String, Object> request, Map<String,
    Object> outMap) {
        Boolean success = true;
        if (methodName == 'getDocumentTemplateList') {
            getTemplateList(request, outMap);
        }
        return success;
    }

    private void getTemplateList(Map < String, Object > inputMap, Map < String, Object > outMap)
    {
        String contractId = (String) inputMap.get('contractId');
    }
}
```

```
String usageType = (String) inputMap.get('usageType');
String billingCountry;
List<Contract> contractList = [SELECT BillingCountry, Id FROM Contract where Id = :contractId];
if(!contractList.isEmpty()) {
Contract contract = contractList.get(0);
billingCountry = contract.BillingCountry != null ? contract.BillingCountry : '';
}
List<DocumentTemplate> templist;
String objName = 'DocumentTemplate';
try {
if(billingCountry.equalsIgnoreCase('India')) {
templist = [select id, isActive, name, type, versionNumber from DocumentTemplate where
IsActive=true and Type = 'MicrosoftWord' and Name like '%APAC%'
order by Name];
} else {
templist = [select id, isActive, name, type, versionNumber from DocumentTemplate where
IsActive=true and Type = 'MicrosoftWord' order by Name];
}
} catch (Exception e) {
throw e;
}
if (templist != null && templist.size() > 0) {
outMap.put('documentTemplateList', templist);
}
}
}
```

industries_clm Namespace

The industries_clm namespace allows user to provide custom logic for any specific task permitted by salesforce. For example, Custom Document Template Filtering, which allows user to provide the filtering logic on Document tab under Contract.

The following are the classes in the industries_clm namespace.

[OpenInterface Interface](#)

The OpenInterface provides user the capability to provide custom logic for task permitted by Salesforce.

OpenInterface Interface

The OpenInterface provides user the capability to provide custom logic for task permitted by Salesforce.

Namespace

[industries_clm](#)

[OpenInterface Methods](#)

[OpenInterface Example Implementation](#)

OpenInterface Methods

The following are methods for OpenInterface.

`invokeMethod(var1, var2, var3)`

Invokes method based on the use-case.

`invokeMethod(var1, var2, var3)`

Invokes method based on the use-case.

Signature

```
public Boolean invokeMethod(String var1, Map<String, Object> var2, Map<String, Object> var3)
```

Parameters

var1

Type: String

Contains the name of the method that is supposed to be implemented from invoke method.

var2

Type: Map<String, ANY>

Contains the inputs as per the use-case.

var3

Type: Map<String, ANY>

Returns the output as per the use-case.

Return Value

Type: Boolean

true or false

OpenInterface Example Implementation

This is an example implementation of the industries_clm.OpenInterface interface.

```
global class TestTF implements industries_clm.OpenInterface {
    public Boolean invokeMethod(String methodName, Map<String, Object> request, Map<String, Object> outMap) {
        Boolean success = true;
        if (methodName == 'getDocumentTemplateList') {
            getTemplateList(request, outMap);
        }
        return success;
    }

    private void getTemplateList(Map < String, Object > inputMap, Map < String, Object > outMap)
```

```

{
String contractId = (String) inputMap.get('contractId');
String usageType = (String) inputMap.get('usageType');
String billingCountry;
List<Contract> contractList = [SELECT BillingCountry, Id FROM Contract where Id =
:contractId];
if(!contractList.isEmpty()) {
Contract contract = contractList.get(0);
billingCountry = contract.BillingCountry != null ? contract.BillingCountry : '';
}
List<DocumentTemplate> templist;
String objName = 'DocumentTemplate';
try {
if(billingCountry.equalsIgnoreCase('India')) {
templist = [select id, isActive, name, type, versionNumber from DocumentTemplate where
IsActive=true and Type = 'MicrosoftWord' and Name like '%APAC%'
order by Name];
} else {
templist = [select id, isActive, name, type, versionNumber from DocumentTemplate where
IsActive=true and Type = 'MicrosoftWord' order by Name];
}
} catch (Exception e) {
throw e;
}
if (templist != null && templist.size() > 0) {
outMap.put('documentTemplateList', templist);
}
}
}

```

industries_docgen Namespace

The `industries_docgen` namespace provides classes and methods for document generation and permission management in Salesforce Industries.

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

[DocGenPermsAndAccessChecksService Class](#)

The `DocGenPermsAndAccessChecksService` class contains methods to check permissions and settings related to document generation and integration features.

[DocumentGenerationProcess Class](#)

The `DocumentGenerationProcess` class provides methods to manage document generation processes.

[DocumentTemplate Class](#)

The `DocumentTemplate` class provides methods to manage document generation templates.

DocGenPermsAndAccessChecksService Class

The `DocGenPermsAndAccessChecksService` class contains methods to check permissions and settings related to document generation and integration features.

Namespace

[industries_docgen](#)

Example

```
industries_docgen.DocGenPermsAndAccessChecksService.isDesigner(UserInfo.getOrganizationId(),
    userInfo.getUserId(), 'DocGenDesigner');
industries_docgen.DocGenPermsAndAccessChecksService.isRuntimeUser(UserInfo.getOrganizationId(),
    userInfo.getUserId(), 'DocGenRuntimeUser');
industries_docgen.DocGenPermsAndAccessChecksService.isRuntimeCCUser(UserInfo.getOrganizationId(),
    userInfo.getUserId(), 'DocGenRuntimeCCUser');
```

This Apex code sample checks whether a user has specific docgen permissions.

[DocGenPermsAndAccessChecksService Methods](#)

DocGenPermsAndAccessChecksService Methods

The following are methods for `DocGenPermsAndAccessChecksService`.

[hasDocGenMetadataSetting\(orgId, orgPreference\)](#)

Checks whether the DocGen metadata setting is enabled for the org (`true`) or not (`false`).

[hasDocGenOrgPerm\(orgId, orgPermission\)](#)

Checks whether the org has the DocGen permission (`true`) or not (`false`).

[hasMS365IntegrationSettingOrgPerm\(orgId, orgPermission\)](#)

Checks whether the org has a Microsoft 365 integration setting permission enabled (`true`) or not (`false`).

[hasOmnistudioOrgPerm\(orgId, orgPermission\)](#)

Checks whether the org has Omnistudio permission enabled (`true`) or not (`false`).

[isDesigner\(orgId, userId, userPerm\)](#)

Checks whether the user has designer permissions enabled (`true`) or not (`false`).

[isRuntimeCCUser\(orgId, userId, userPerm\)](#)

Checks whether the user has runtime customer community user permissions (`true`) or not (`false`).

[isRuntimeUser\(orgId, userId, userPerm\)](#)

Checks whether the user has runtime user permissions (`true`) or not (`false`).

hasDocGenMetadataSetting(orgId, orgPreference)

Checks whether the DocGen metadata setting is enabled for the org (`true`) or not (`false`).

Signature

```
public static Boolean hasDocGenMetadataSetting(String orgId, String orgPreference)
```


Parameters

orgId

Type: String

ID of the org.

orgPreference

Type: String

Name of the DocGen metadata setting.

Return Value

Type: Boolean

hasDocGenOrgPerm(orgId, orgPermission)Checks whether the org has the DocGen permission (`true`) or not (`false`).

Signature

```
public static Boolean hasDocGenOrgPerm(String orgId, String orgPermission)
```

Parameters

orgId

Type: String

ID of the org.

orgPermission

Type: String

Name of the permission.

Return Value

Type: Boolean

hasMS365IntegrationSettingOrgPerm(orgId, orgPermission)Checks whether the org has a Microsoft 365 integration setting permission enabled (`true`) or not (`false`).

Signature

```
public static Boolean hasMS365InetgrationSettingOrgPerm(String orgId, String orgPermission)
```

Parameters

orgId

Type: String

ID of the org.

orgPermission

Type: String

Name of the permission.

Return Value

Type: Boolean

hasOmnistudioOrgPerm(orgId, orgPermission)

Checks whether the org has Omnistudio permission enabled (true) or not (false).

Signature

```
public static Boolean hasOmnistudioOrgPerm(String orgId, String orgPermission)
```

Parameters

orgId

Type: String

ID of the org.

orgPermission

Type: String

Name of the Omnistudio permission.

Return Value

Type: Boolean

isDesigner(orgId, userId, userPerm)

Checks whether the user has designer permissions enabled (true) or not (false).

Signature

```
public static Boolean isDesigner(String orgId, String userId, String userPerm)
```

Parameters

orgId

Type: String

ID of the org.

userId

Type: String

ID of the user.

userPerm

Type: String

Name of the user permission to check for designer status.

Return Value

Type: Boolean

SEE ALSO:

[Salesforce Help : Permission Set Licenses for Omnistudio Document Generation](#)

isRuntimeCCUser(orgId, userId, userPerm)

Checks whether the user has runtime customer community user permissions (`true`) or not (`false`).

Signature

```
public static Boolean isRuntimeCCUser(String orgId, String userId, String userPerm)
```

Parameters

orgId

Type: String

ID of the org.

userId

Type: String

ID of the user.

userPerm

Type: String

Name of the user permission to check for runtime customer community user status.

Return Value

Type: Boolean

SEE ALSO:

[Salesforce Help : Permission Set Licenses for Omnistudio Document Generation](#)

isRuntimeUser(orgId, userId, userPerm)

Checks whether the user has runtime user permissions (`true`) or not (`false`).

Signature

```
public static Boolean isRuntimeUser(String orgId, String userId, String userPerm)
```

Parameters

orgId

Type: String

ID of the org.

userId

Type: String

ID of the user.

userPerm

Type: String

Name of the user permission to check for runtime user status.

Return Value

Type: Boolean

DocumentGenerationProcess Class

The `DocumentGenerationProcess` class provides methods to manage document generation processes.

Namespace

[industries_docgen](#)

Example

```
Map<String, Object> parameters = new Map<String, Object>();
parameters.put('requestText', '{}');
parameters.put('type', 'GenerateAndConvert');
parameters.put('status', 'InProgress');
parameters.put('title', 'TestTitle');
//industries_docgen.DocumentGenerationProcess.createDocumentGenerationProcess(parameters);
Type type = Type.forName('industries_docgen.DocumentGenerationProcess');
System.Callable docgen = (System.Callable) type.newInstance();
docgen.Call('createDocumentGenerationProcess', parameters);
```

This Apex code creates a `DocumentGenerationProcess` record for server-side document generation. This code uses a Map as input that contains all the required fields to create an entry in the database.

[DocumentGenerationProcess Methods](#)

DocumentGenerationProcess Methods

The following are methods for `DocumentGenerationProcess`.

[Call\(methodName, inputMap\)](#)

Invokes a method with specified input parameters for the document generation process.

Call(methodName, inputMap)

Invokes a method with specified input parameters for the document generation process.

Signature

```
public Object Call(String methodName, Map<String, Object> inputMap)
```

Parameters

methodName

Type: String

Name of the method to be called.

inputMap

Type: Map<String, Object>

Map that contains input parameters for the method that is called.

Return Value

Type: Object

DocumentTemplate Class

The DocumentTemplate class provides methods to manage document generation templates.

Namespace

[industries_docgen](#)

Example

```
System.Callable connect = (System.Callable) type.newInstance();
Map<String, Object> inputMap = new Map<String, Object>();
inputMap.put('documentTemplateId', templateId);
docTemplate =
SObjectProxy.of(DocGenObjectMappings.getSObjectType(DocGenObjectMappings.DOCUMENT_TEMPLATE_STR).newSObject());
Map<String, Object> mapData = (Map<String,
Object>) connect.Call('getNamespaceByDocumentTemplateId', inputMap);
```

This GET request retrieves the Namespace field from the DocumentTemplate entity, using the documentTemplate ID as input.

[DocumentTemplate Methods](#)

DocumentTemplate Methods

The following are methods for DocumentTemplate.

[Call\(methodName, inputMap\)](#)

Invokes a method with input parameters to manage document templates.

Call(methodName, inputMap)

Invokes a method with input parameters to manage document templates.

Signature

```
public Object Call(String methodName, Map<String, ANY> inputMap)
```

Parameters

methodName

Type: String

Name of the method to be called.

inputMap

Type: Map<String, ANY>

Map that contains input parameters for the method that is called.

Return Value

Type: `Object`

Salesforce Contracts Resources

Salesforce Contracts Business APIs (CLM and E-signature) are RESTful APIs that are sometimes available as Apex classes and methods.

[REST Reference](#)

You can access Salesforce Contracts APIs using REST endpoints. These REST APIs follow similar conventions as Connect REST APIs.

REST Reference

You can access Salesforce Contracts 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 Salesforce Contracts API resources.

[Request Bodies](#)

Here's a list of Salesforce Contracts API request bodies.

[Response Bodies](#)

Here's a list of Salesforce Contracts response bodies.

Resources

Here's a list of Salesforce Contracts API resources.

[Clause Library Resources](#)

Manage Salesforce Contracts clause library resources.

CLM Resources

Manage Salesforce Contracts CLM resources. Check in and check out a contract document. Get and delete content document details. Execute actions for a contract based on the status. Update and create contracts. Get and create contract document versions. Get the status of document generation process. Get the list of configured templates for a usage type. Get a list of actions possible for a particular contract. Lock and unlock an active contract document version. Change a template in a contract document version.

Context Mapping Extraction Resources

Manage custom mappings used in the extraction flow of documents before their fields are sent for extraction. Use the Extraction Context Mapping resource to map extracted field values to their own set of custom fields relevant to their contract types and business cases.

Customer Community Resources

Manage document control for Customer Community (CC) users by using Salesforce's Contract Lifecycle Management (CLM). Using CLM, CC users can securely access the most recent contract document versions. Use the Contract Document Version resource to streamline document sharing for external reviews and digital signing, ensuring access is granted only for the latest and relevant contract versions in compliance with the user's account and contract status.

Design Document Template Resources

Manage Salesforce Contracts with Design Document Template Resources. Create, manage, and maintain contracts associated with opportunities, orders, and quotes throughout the sales cycle. Use this resource to create dynamic documents for various purposes, such as proposals and order documents, enhancing your overall document management workflow.

External Document Resources

Manage Salesforce Contracts external documents. Users can save external documents. Get information about external document details and update.

E-signature Resources

Manage Salesforce Contracts e-signature process. Users can view list of documents sent for e-signature and recipients. Update e-signature envelope status, notification settings and get e-signature signer roles.

Clause Library Resources

Manage Salesforce Contracts clause library resources.

Available resources are:

Resource	Description
/connect/clause-library/clause-category-configurations	Access list of clause categories from the configuration.
/connect/clause-library/document-clauses/fields	Get distinct document clause values for a given fieldName parameter.
/connect/clause-library/document-clause-sets	Get document clause sets as per specified filters.

Clause Category List

Access list of clause categories from the configuration.

Document Clause Fields

Get distinct document clause values for a given fieldName parameter.

Document Clause Sets

Get document clause sets as per specified filters.

Clause Category List

Access list of clause categories from the configuration.

Resource

```
/connect/clause-library/clause-category-configurations
```

Example URI

```
https://yourInstance.salesforce.com/services/data/64.0/connect/clause-library/clause-category-configurations
```

Available version

57.0

HTTP methods

GET

Request parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
name	String	The name of the clause category.	Required	57.0
usageType	String	The usage type for the clause category. Valid values are: - Contract Clause Category - Disclosure Category	Required	57.0

Response body for GET

[Clause Library Category Response](#)

Document Clause Fields

Get distinct document clause values for a given fieldName parameter.

Resource

```
/connect/clause-library/document-clauses/fields
```

Example URI

```
https://yourInstance.salesforce.com/services/data/64.0/connect/clause-library/document-clauses/fields?clauseSetId={id}
```

Available version

57.0

HTTP methods

GET

Query parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
clauseSetId	String	The ID of the document clause set.	Required	57.0

Parameter Name	Type	Description	Required or Optional	Available Version
fieldName	String	Specifies language and name. Value is case-sensitive. Possible values are: - Language - Name	Required	57.0
language	String	The language for the clauseSetId parameter.	Required	57.0
name	String	The name for the clauseSetId parameter.	Required	57.0
status	String	Displays records based on the status.	Required	57.0

Response body for GET[Document Clause Fields Response](#)**Document Clause Sets**

Get document clause sets as per specified filters.

Resource`/connect/clause-library/document-clause-sets`**Example URI**`https://yourInstance.salesforce.com/services/data/64.0/connect/clause-library/document-clause-sets`**Available version**

57.0

HTTP methods

GET

Query parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
category	String	The comma-separated category values used for filtering.	Required	57.0
defaultLanguage	String	The comma-separated language values used for filtering.	Required	57.0
name	String	The name of the clause set used for filtering.	Required	57.0
status	String	The comma-separated status values used for filtering.	Required	57.0

Response body for GET[Document Clause Set List Response](#)**CLM Resources**

Manage Salesforce Contracts CLM resources. Check in and check out a contract document. Get and delete content document details. Execute actions for a contract based on the status. Update and create contracts. Get and create contract document versions. Get the status of document generation process. Get the list of configured templates for a usage type. Get a list of actions possible for a particular contract. Lock and unlock an active contract document version. Change a template in a contract document version.

Available resources are:

Resource	Description
/connect/clm/contract-document-version/{contractDocumentVersionId}/checkIn	Check in a contract document version using contract document version ID.
/connect/clm/contract-document-version/{contractDocumentVersionId}/checkout	Check out a contract document version for modification.
/connect/clm/contract-document-version/{contractDocumentVersionId}/content-documents	Get content document details associated with a contract document version.
/connect/clm/contract/{contractId}	Execute possible actions for a contract based on the status. Actions can trigger work flows and change the status for a contract.
/connect/clm/contract	Update and create contracts using the object ID.
/connect/clm/contract/{contractId}/contract-document-version	Get and create contract document versions.
/connect/clm/document-generation-process/status	Get the status of document generation process for a given contract document version ID.
/connect/clm/document-template	Get the list of configured templates for a usage type.
/connect/clm/contract/{contractId}/contract-actions	Get the list of actions possible for a particular contract.
/connect/clm/contract-document-version/{contractDocumentVersionId}/lock	Lock an active contract document version for modification.
/connect/clm/contract-document-version/{contractDocumentVersionId}/unlock	Unlock latest contract document version.
/connect/clm/contract-document-version/{contractDocumentVersionId}	Change the template in a contract document version.

[Content Link Load \(POST\)](#)

Fetches the content data for a specified reference ID or set of content link IDs.

[Check In Contract Document Version](#)

Check in a contract document version using contract document version ID.

[Check Out Contract Document Version](#)

Check out a contract document version for modification.

[Content Document Details \(GET, DELETE, PATCH\)](#)

Get content document details associated with a contract document version. Delete content document details associated with a contract document version. Update the content document details associated with a contract document version.

[Contracts \(PATCH, POST\)](#)

Update and create contracts using the object ID.

[Contract Actions](#)

Execute possible actions for a contract based on the status. Actions can trigger work flows and change the status for a contract.

[Contract Document Version Template](#)

Change the template in a contract document version.

[Details of Contract Document Versions](#)

Get and create contract document versions.

[Document Generation Process](#)

Get the status of document generation process for a given contract document version ID.

[Document Template](#)

Get the list of configured templates for a usage type.

[List of Contract Actions](#)

Get the list of actions possible for a particular contract.

[Lock Document Version](#)

Lock an active contract document version for modification.

[Unlock Document Version](#)

Unlock latest contract document version.

Content Link Load (POST)

Fetches the content data for a specified reference ID or set of content link IDs.

Resource

```
/connect/content-link/load
```

Example POST

```
https://yourInstance.salesforce.com/services/data/v64.0/connect/content-link/load
```

Available version

62.0

HTTP methods

POST

Request body for POST

JSON example

```
{
  "referenceObjectId": "a0X4W00000X8jklUAB",
  "contentLinkIds": [
    "0D56A000008yhfsAAQ",
    "0D56A000008yhgTABQ"
  ]
}
```

```

    ]
  }

```

Properties

Name	Type	Description	Required or Optional	Available Version
contentLinkIds	String[]	List of the content link IDs to fetch the data.	Optional	62.0
referenceObjectId	String	ID of the reference object to retrieve the content data.	Optional	62.0

Response body for POST
[Content Link List](#)
Check In Contract Document Version

Check in a contract document version using contract document version ID.

Resource

```
/connect/clm/contract-document-version/{contractDocumentVersionId}/checkIn
```

Available version

56.0

HTTP methods

PATCH

Example for PATCH

```
https://yourInstance.salesforce.com/services/data/v56.0/connect/clm/contract-document-version/{contractDocumentVersionId}/checkIn
```

Response body for PATCH
[Generic Output Representation](#)
Check Out Contract Document Version

Check out a contract document version for modification.

Resource

```
/connect/clm/contract-document-version/{contractDocumentVersionId}/checkout
```

Available version

56.0

HTTP methods

POST

Example for POST

```
https://yourInstance.salesforce.com/services/data/v64.0/connect/clm/contract-document-version/{contractDocumentVersionId}/checkout
```

Request body for POST**JSON example**

```
{
  "templateId": "2dtxx000000004rAAA",
  "isExternalReviewImport": false,
  "externalReviewType": "OnlineMicrosoft365"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
externalReviewType	String	Type of external review. Possible values are: - OnlineMicrosoft365 - OfflineMicrosoftWord	Optional	60.0
isExternalReviewImport	Boolean	Indicates whether the checkout is for an external review import (<code>true</code>) or not (<code>false</code>).	Optional	59.0
pdfDocumentId	String	ID for Contract PDF document.	Optional	56.0
templateId	String	Template ID with key prefix 2dt used to generate document.	Required	56.0
wordDocumentId	String	ID for Contract word document.	Optional	56.0

Response body for POST[Document Generate](#)**Content Document Details (GET, DELETE, PATCH)**

Get content document details associated with a contract document version. Delete content document details associated with a contract document version. Update the content document details associated with a contract document version.

Resource

```
/connect/clm/contract-document-version/{contractDocumentVersionId}/content-documents
```

Available version

56.0

HTTP methods

GET, DELETE, PATCH

Example for GET

```
https://yourInstance.salesforce.com/services/data/v56.0/connect/clm/contract-document-version/$0qtXXXXXX/content-documents
```

Example for DELETE

```
https://yourInstance.salesforce.com/services/data/v56.0/connect/clm/contract-document-version/$0qtXXXXX/content-documents?contentDocumentId=069XXXXXX
```

Example for PATCH

```
https://yourInstance.salesforce.com/services/data/v60.0/connect/clm/contract-document-version/$0qtXXXXX/content-document?contentDocumentId=069XXXXXX&share=true
```

Request parameters for DELETE

Parameter Name	Type	Description	Required or Optional	Available Version
contentDocumentId	String	ID of the content document object created for an attachment.	Required	56.0

JSON example for DELETE

```
{
  "contractDocumentVersionId": "0qtXXXXXXX" // The contractDocumentVersionId for which
  the attachment is to be Deleted.
  "contentDocumentId" : "069XXXXXXX" // The ContentDocumentId is ID of ContentDocument
  created for attachment
}
```

Response body for GET

[Content Document List](#)

Request parameters for PATCH

Parameter Name	Type	Description	Required or Optional	Available Version
contentDocumentId	String	ID of the content document whose sharing status is being updated.	Required	60.0
share	Boolean	Indicates whether sharing is enabled (<code>true</code>) or disabled (<code>false</code>) for the content document.	Required	60.0

Response body for PATCH

[Generic Output](#) on page 189[]

Contracts (PATCH, POST)

Update and create contracts using the object ID.

Resource

```
/connect/clm/contract
```

Available version

56.0

HTTP methods

PATCH, POST

Example for PATCH

```
https://yourInstance.salesforce.com/services/data/v56.0/connect/clm/contract
```

Example for POST

```
https://yourInstance.salesforce.com/services/data/v56.0/connect/clm/contract
```

Request body**JSON example for creating and updating contract**

```
{
  "sourceObjectId" : "006xx000001a4KaAAI",
  "templateName" : "Value1",
  "isAutoDocgenRequired" : true/false
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
isAutoDocgenRequired	Boolean	Specifies whether automatic document generation is required or not.	Required	56.0
recordTypeName	String	Contract record type name.	Optional	56.0
sourceObjectId	String	Source record ID.	Required	56.0
templateName	String	Document template name for document generation.	Optional	56.0

Response body
[Contract Output Response Representation](#)
Contract Actions

Execute possible actions for a contract based on the status. Actions can trigger work flows and change the status for a contract.

Resource

```
/connect/clm/contract/{contractId}
```

Available version

56.0

HTTP methods

PATCH

Example for PATCH

```
https://yourInstance.salesforce.com/services/data/v56.0/clm/contract/${contractId}
```

Request body for PATCH**JSON example**

```
{
  "actionApiName" : "updateEnvelopeStatus",
  ...."actionId" : //object state action definition id,
  "actionData":{
    "isUpdateEnvelopeStatusSuccess": true
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
actionApiName	String	API name for respective contract action.	Optional	57.0
actionId	String	ID for Object state Action Definition record.  Note: For the list of all standard actions supported, refer Predefined Dynamic (Contract) Actions .	Optional	57.0
actionData	Map<String, String>	Action body with supported format string.	Optional	57.0

 **Note:** For any request, either `actionApiName` or `actionId` must be passed. If none passed, the application raises an exception.

Response body for PATCH[Generic Output Representation](#)**Contract Document Version Template**

Change the template in a contract document version.

Resource

```
/connect/clm/contract-document-version/${contractDocumentVersionId}
```

Available version

56.0

HTTP methods

PATCH

Example for PATCH

```
https://yourInstance.salesforce.com/services/data/v56.0/connect/clm/contract-document-version/${contractDocumentVersionId}
```

Request body for PATCH**JSON example**

```
{
  "templateId": "2dtxx0000000004rAAA",
  "isExternalReviewImport": false,
  "externalReviewType": "OnlineMicrosoft365"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
externalReviewType	String	Type of external review. Possible values are: - OnlineMicrosoft365 - OfflineMicrosoftWord	Optional	60.0
isExternalReviewImport	Boolean	Indicates whether the checkout is for an external review import (<code>true</code>) or not (<code>false</code>).	Optional	59.0
pdfDocumentId	String	ID for Contract PDF document.	Optional	56.0
templateId	String	Template ID with key prefix 2dt used to generate document.	Required	56.0
wordDocumentId	String	ID for Contract word document.	Optional	56.0

Response body for PATCH[Document Generate Representation](#)**Details of Contract Document Versions**

Get and create contract document versions.

Resource

```
/connect/clm/contract/${contractId}/contract-document-version
```

Available version

56.0

HTTP methods

GET, POST

Example for GET

```
https://yourInstance.salesforce.com/services/data/v56.0/connect/clm/contract/{contractId}/contract-document-version
```

```
https://yourInstance.salesforce.com/services/data/v56.0/connect/clm/contract/{contractId}/contract-document-version?contractDocumentVersionId={contractDocumentVersionId}
```

Example for POST

```
https://yourInstance.salesforce.com/services/data/v56.0/connect/clm/contract/{contractId}/contract-document-version
```

Response body for GET[Contract Document Versions List Representation](#)**Request body for POST****JSON example**

```
{
  "templateId": "2dtxx0000000004rAAA",
  "isExternalReviewImport": false,
  "externalReviewType": "OnlineMicrosoft365"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
externalReviewType	String	Type of external review. Possible values are: - OnlineMicrosoft365 - OfflineMicrosoftWord	Optional	60.0
isExternalReviewImport	Boolean	Indicates whether the checkout is for an external review import (<code>true</code>) or not (<code>false</code>).	Optional	59.0
pdfDocumentId	String	ID for Contract PDF document.	Optional	56.0
templateId	String	Template ID with key prefix 2dt used to generate document.	Required	56.0
wordDocumentId	String	ID for Contract word document.	Optional	56.0

Response body for POST[Document Generate Representation](#)

Document Generation Process

Get the status of document generation process for a given contract document version ID.

Resource

```
/connect/clm/document-generation-process/status
```

Available version

56.0

HTTP methods

GET

Example for GET

```
https://yourInstance.salesforce.com/services/data/v56.0/connect/clm/document-generation-process/status?contractDocumentVersionId=<contractDocumentVersionId>
```

Request parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
contractDocumentVersionId	String	ID of the contract document version.	Required	56.0

Response body for GET

[Document Generation Process Status Representation](#)

Document Template

Get the list of configured templates for a usage type.

Resource

```
/connect/clm/document-template
```

Available version

56.0

HTTP methods

GET

Example for GET

```
https://yourInstance.salesforce.com/services/data/v56.0/connect/clm/document-template?usageType=<usageType>&isActive=<true/false>&type=<>
```

Request parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
contractId	String	ID of the contract document.	Optional	55.0
isActive	Boolean	Status of the template.	Required	55.0
type	String	Format of the contract document. For example, <code>MicrosoftWord</code> .	Required	55.0

Parameter Name	Type	Description	Required or Optional	Available Version
usageType	String	Usage type. For example, Contract_Life_Cycle_Management.	Required	55.0

Response body for GET[Template List Representation](#)**List of Contract Actions**

Get the list of actions possible for a particular contract.

Resource

```
/connect/clm/contract/${contractId}/contract-actions
```

Available version

56.0

HTTP methods

GET

Example for GET

```
https://yourInstance.salesforce.com/services/data/v56.0/connect/clm/contract/${contractId}/contract-actions
```

Response body for GET[Contract Action List Representation](#)**Lock Document Version**

Lock an active contract document version for modification.

Resource

```
/connect/clm/contract-document-version/${contractDocumentVersionId}/lock
```

Available version

56.0

HTTP methods

PATCH

Example for PATCH

```
https://yourInstance.salesforce.com/services/data/v56.0/connect/clm/contract-document-version/${contractversionid}/lock
```

Response body for PATCH[Generic Output Representation](#)**Unlock Document Version**

Unlock latest contract document version.

Resource

```
/connect/clm/contract-document-version/{contractDocumentVersionId}/unlock
```

Available version

56.0

HTTP methods

PATCH

Example for PATCH

```
https://yourInstance.salesforce.com/services/data/v56.0/connect/clm/contract-document-version/{contractDocumentVersionId}/unlock
```

Response body for PATCH[Generic Output Representation](#)

Context Mapping Extraction Resources

Manage custom mappings used in the extraction flow of documents before their fields are sent for extraction. Use the Extraction Context Mapping resource to map extracted field values to their own set of custom fields relevant to their contract types and business cases.

Available resource is:

Resource	Description
/connect/clm/extraction-context-mappings (POST)	Create extraction context-mapping details that show how extracted data is associated with Salesforce fields.
/connect/clm/extraction-context-mappings/{contextUseCaseMappingId} (DELETE, GET, PATCH)	Delete extraction context mapping details based on the specified context use case mapping ID. Get extraction context mapping details based on the specified context use case mapping ID. Update extraction context mapping details based on the specified context use case mapping ID.

[Extraction Context Mapping \(POST\)](#)

Create extraction context-mapping details that show how extracted data is associated with Salesforce fields.

[Extraction Context Mappings \(DELETE, GET, PATCH\)](#)

Delete extraction context mapping details based on the specified context use case mapping ID. Get extraction context mapping details based on the specified context use case mapping ID. Update extraction context mapping details based on the specified context use case mapping ID.

Extraction Context Mapping (POST)

Create extraction context-mapping details that show how extracted data is associated with Salesforce fields.

Resource

```
/connect/clm/extraction-context-mappings
```

Example

```
https://yourInstance.salesforce.com/services/data/v64.0/connect/clm/extraction-context-mappings
```

Available version

61.0

HTTP methods

POST

Request body for POST**JSON example**

```
{
  "ContextUsecaseMapping": {
    "templateName": "ContractExtractionTemplate",
    "contextDefinitionDeveloperName": "ContractExtractionContextDefinition",
    "mappingName": "ContractExtractionMappingName",
    "targetObject": "Contract",
    "recordType": "CLM"
  },
  "contextAttributeMapping": [
    {
      "attributeId": "11nxx000001hOozAAE",
      "description": "extract startDate from the document"
    },
    {
      "attributeId": "11nxx000001hOozAAV",
      "description": "extract startDate from the document"
    },
    {
      "attributeId": "11nxx000001hOozAAR",
      "description": "extract startDate from the document"
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
contextAttributeMapping	Extraction Context Attribute Mapping Input[]	List of attributes and their mappings.	Yes	61.0
contextUsecaseMapping	Extraction Context Use Case Mapping Input	Details of the use case for which the mapping is defined.	Yes	61.0

Response body for POST[Extraction Context Mappings](#)

Extraction Context Mappings (DELETE, GET, PATCH)

Delete extraction context mapping details based on the specified context use case mapping ID. Get extraction context mapping details based on the specified context use case mapping ID. Update extraction context mapping details based on the specified context use case mapping ID.

Resource

```
/connect/clm/extraction-context-mappings/{contextUseCaseMappingId}
```

Available version

61.0

HTTP methods

DELETE GET PATCH

Example for DELETE

```
https://yourInstance.salesforce.com/services/data/v64.0/connect/clm/extraction-context-mappings/11jSB000002XIWjYAO
```

Example for GET

```
https://yourInstance.salesforce.com/services/data/v64.0/connect/clm/extraction-context-mappings/11jSB000002XIWjYAO
```

Example for PATCH

```
https://yourInstance.salesforce.com/services/data/v64.0/connect/clm/extraction-context-mappings/11jSB000002XIWjYAO
```

Response body for GET

[Extraction Context Mapping](#)

Request body for PATCH

JSON example

```
{
  "ContextUsecaseMapping": {
    "templateName": "ContractExtractionTemplate",
    "contextDefinitionDeveloperName": "ContractExtractionContextDefinition",
    "mappingName": "ContractExtractionMappingName",
    "targetObject": "Contract",
    "recordType": "CLM"
  },
  "contextAttributeMapping": [
    {
      "attributeId": "11nxx000001hOozAAE",
      "description": "extract startDate from the document"
    },
    {
      "attributeId": "11nxx000001hOozAAV",
      "description": "extract startDate from the document"
    },
    {
      "attributeId": "11nxx000001hOozAAR",
      "description": "extract startDate from the document"
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
contextAttributeMapping	Extraction Context Attribute Mapping Input[]	List of attributes and their mappings.	Yes	61.0
contextUseCaseMapping	Extraction Context Use Case Mapping Input	Details of the use case for which the mapping is defined.	Yes	61.0

Response body for PATCH

[Extraction Context Mappings](#)

Customer Community Resources

Manage document control for Customer Community (CC) users by using Salesforce's Contract Lifecycle Management (CLM). Using CLM, CC users can securely access the most recent contract document versions. Use the Contract Document Version resource to streamline document sharing for external reviews and digital signing, ensuring access is granted only for the latest and relevant contract versions in compliance with the user's account and contract status.

Available resources are:

Resource	Description
/connect/clm/cc/contract/{contractId}/contract-document-version (GET)	Get latest details of a contract document version based on a contract ID.
/connect/clm/cc/document-recipient/contract-document-version/{contract-document-version-id} (GET)	Fetch recipient status for contract document versions to monitor e-signature progress and identify decline reasons.

[Contract Document Version for Customer Community User \(GET\)](#)

Get latest details of a contract document version based on a contract ID.

[Document Recipient \(GET\)](#)

Fetch recipient status for contract document versions to monitor e-signature progress and identify decline reasons.

Contract Document Version for Customer Community User (GET)

Get latest details of a contract document version based on a contract ID.

Resource

```
/connect/clm/cc/contract/{contractId}/contract-document-version
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v61.0/connect/clm/cc/contract/{contractId}/contract-document-version?showDetails=true
```


Available version

60.0

HTTP methods

GET

Request parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
showDetails	Boolean	Indicates whether to include detailed information about attachments in the response. (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code> .	Required	60.0

Response body for GET[Contract Document Version CC Response](#)**Document Recipient (GET)**

Fetch recipient status for contract document versions to monitor e-signature progress and identify decline reasons.

Resource

```
/connect/clm/cc/documentRecipient
```

Example

```
https://yourInstance.salesforce.com/services/data/v64.0/connect/clm/cc/documentRecipient?contractDocumentVersion=11xxx000001h0ozAAE
```

Available version

61.0

HTTP methods

GET

Request parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
contractDocumentVersionId	String	Record ID of the contract document version.	Required	61.0

Response body for GET[Document Recipient Status](#)

Design Document Template Resources

Manage Salesforce Contracts with Design Document Template Resources. Create, manage, and maintain contracts associated with opportunities, orders, and quotes throughout the sales cycle. Use this resource to create dynamic documents for various purposes, such as proposals and order documents, enhancing your overall document management workflow.

Available resource is:

Resource	Description
/connect/docgen/document-templates	Access document template actions, including template creation with the Document Template Designer.

[Document Templates \(GET, PATCH, POST\)](#)

Access document template actions, including template creation with the Document Template Designer.

Document Templates (GET, PATCH, POST)

Access document template actions, including template creation with the Document Template Designer.

Resource

```
/connect/docgen/document-templates
```

GET Example

```
https://yourInstance.salesforce.com/services/data/v64.0/connect/docgen/document-templates?offset=${offset}&limit=${limit}&searchString=${searchString}
```

PATCH Example

```
https://yourInstance.salesforce.com/services/data/v64.0/connect/docgen/document-templates?documentTemplateId=${documentTemplateId}
```

POST Example

```
https://yourInstance.salesforce.com/services/data/v64.0/connect/docgen/document-templates?documentTemplateId=${documentTemplateId}&action=${action}
```

Available version

60.0

HTTP methods

GET, PATCH, POST

Request parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
limit	String	Number of document templates per page. The default value is 20.	Optional	60.0
offset	String	Number of records to skip. The default value is 0.	Optional	60.0
searchString	String	Search term that is used to retrieve a list of document templates.	Optional	60.0

Response body for GET[Document Template List](#)**Request body for PATCH****JSON example**

```
{
  "isActive": "false",
  "status": "Draft",
  "documentGenerationMechanism": "ClientSide",
  "extractOmniDataTransformName": "Extractor",
  "mapperOmniDataTransformName": "Mapper",
  "shouldDisplayUnmappedToken": "false",
  "tokenList": "token1,token2,token3",
  "tokenMappingMethodType": "OmniDataTransform",
  "usageType": "Contract_Lifecycle_Management",
  "contentDocumentId": "069xxxxxxxxxxxxxxxxx"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
contentDocumentId	String	ID of the document associated with a document template.	Optional	60.0
documentGenerationMechanism	String	Method for generating the document.	Optional	60.0
extractOmniDataTransformName	String	Name of the OmniDataTransform bundle of the extract type.	Optional	60.0
isActive	Boolean	Indicates whether the document template is set to active (<code>true</code>) or inactive (<code>false</code>).	Optional	60.0
mapperOmniDataTransformName	String	Name of the OmniDataTransform bundle of the mapper type.	Optional	60.0
shouldDisplayUnmappedToken	Boolean	Indicates whether the document template unmapped tokens be displayed (<code>true</code>) or not (<code>false</code>).	Optional	60.0
status	String	Status to be set for the document template.	Optional	60.0

Name	Type	Description	Required or Optional	Available Version
tokenList	String	List of tokens present in the document template.	Optional	60.0
tokenMapping MethodType	String	Processing method for data that can originate from the same source object.	Optional	60.0
usageType	String	Usage type of the document template.	Optional	60.0

Response body for PATCH[Document Template](#)**Request parameters for PATCH**

Parameter Name	Type	Description	Required or Optional	Available Version
documentTemplateId	String	ID of the document template for operations like cloning or creating a new version.	Required	60.0

Request parameters for POST

Parameter Name	Type	Description	Required or Optional	Available Version
action	String	Action to be performed on the document template. Valid values are: - Clone - NewVersion	Optional	60.0
documentTemplateId	String	ID of the document template for operations like cloning or creating a new version.	Optional	60.0

Request body for POST**JSON example**

```
{
  "name": "TemplateName",
  "type": "MicrosoftWord/MicrosoftPowerpoint/Microsoft365Word",
  "tokenMappingMethodType": "OmniDataTransform",
  "tokenMappingType": "JSON",
  "extractOmniDataTransformName": "ExtractName",
  "mapperOmniDataTransformName": "MapperName",
  "contentDocumentId": "069xx0000004CyeAAE",
  "documentGenerationMechanism": "ServerSide",
```

```

"usageType": "Contract_Lifecycle_Management",
"tokenList": "token1,token2,token3"
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
content DocumentId	String	ID of the Document associated with a document template.	Optional	60.0
document Generation Mechanism	String	Method for generating the document.	Optional	60.0
extractDataTransformName	String	Name of the OmniDataTransform bundle of the extract type.	Optional	60.0
mapper OmniData Transform Name	String	Name of the OmniDataTransform bundle of the mapper type.	Optional	60.0
name	String	Name of the document template.	Required	60.0
tokenList	String	List of tokens present in the document template.	Optional	60.0
tokenMapping MethodType	String	Processing method for the data that can originate from same source object.	Required	60.0
tokenMapping Type	String	Mapping type for tokens of the document template.	Required	60.0
type	String	Type of document template.	Required	60.0
usageType	String	Usage type of the document template.	Optional	60.0

Response body for POST

[Document Template](#)

External Document Resources

Manage Salesforce Contracts external documents. Users can save external documents. Get information about external document details and update.

Available resources are:

Resource	Description
/connect/external-document/save	Save external documents.
/connect/external-document	Get information about external document details and update.

[External Documents Save](#)

Save external documents.

[External Documents \(GET, POST\)](#)

Get information about external document details and update.

[External Document Review \(GET\)](#)

Retrieve external document for review using latest contract document version.

External Documents Save

Save external documents.

Resource

```
/connect/external-document/save
```

Available version

58.0

Example for PUT

```
https://yourInstance.salesforce.com/services/data/v58.0/connect/external-document?externalDocumentId=$(externalDocumentId)&isAsync=false
```

HTTP methods

PUT

Request body for PUT

JSON example

```
{
  "externalDocumentId" : "id",
  "isAsync" : "false",
  "metadata": {
    "sections" : [
      {
        "guid": "guid1",
        "name": "test1",
        "isReadOnly": false
      },
      {
        "guid": "guid2",
        "name": "test2",
        "isReadOnly": false
      }
    ],
    "objectReferences" : [
      {
        "objectType": "clause",
        "objectId": "clauseid1",
        "usages": {
          "sectionIds": [
            "guid1",
            "guid2"
          ],
          "usedInDocument": true
        }
      }
    ]
  }
}
```

```
        },
      },
      {
        "objectType": "clause",
        "objectId": "clauseid2",
        "usages": {
          "sectionIds": [
            "guid1",
            "guid2"
          ],
          "usedInDocument": false // points to if this object is used in
document as well without sections
        }
      }
    ]
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
externalDocumentId	String	ID of an external document.	Required	58.0
isAsync	Boolean	Is Async	Required	58.0
metadata	External Document Metadata	Metadata	Optional	58.0

Response body for PUT

[Save External Document Representation](#)

External Documents (GET, POST)

Get information about external document details and update.

Resource

```
/connect/external-document
```

Example URI

```
https://yourInstance.salesforce.com/services/data/v58.0/connect/external-document
```

Available version

58.0

Example for GET



Note: You can access the external document details using the reference object such as document template, contract document version or using the external document ID.

```
https://yourInstance.salesforce.com/services/data/v58.0/connect/external-document?externalDocumentId=${externalDocumentId}
```

```
https://yourInstance.salesforce.com/services/data/v58.0/connect/external-document?refObjectId=${refObjectId}
```

```
https://yourInstance.salesforce.com/services/data/v58.0/connect/external-document?externalDocumentId=${externalDocumentId}&refObjectId=${refObjectId}
```

Example for POST

```
https://yourInstance.salesforce.com/services/data/v58.0/connect/external-document
```

HTTP methods

GET, POST

Query parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
externalDocumentId	String	ID of an external document record.	Required	58.0
refObjectId	String	ID for the salesforce reference object.	Required	58.0

Response body for GET

[External Document Output](#)

Request body for POST

JSON example

```
{
  "refObjectId": "",
  "contentversionId": "",
  "documentNamePrefix": "namespaceprefix",
  "isAsync": true
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
contentVersionId	String	Content version ID of the document using which new external document is created.	Required	58.0
documentNamePrefix	String	Document name prefix, which is required to name the newly created external document.	Optional	58.0

Name	Type	Description	Required or Optional	Available Version
isAsync	String	Determines the way the external document gets created.	Optional	58.0
refObjectId	String	ID of the reference object. This can be either a document template or a contract ID.	Optional	58.0

Response body for POST[External Document Creation Output](#)**External Document Review (GET)**

Retrieve external document for review using latest contract document version.

Resource

```
/connect/clm/cc/external-document
```

Example

```
https://yourInstance.salesforce.com/services/data/v64.0/connect/clm/cc/external-document?contractDocumentVersion=11nx000001h0ozAAE
```

Available version

61.0

HTTP methods

GET

Request parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
contractDocumentVersionId	String	Record ID for the contract document version.	Required	61.0

Response body for GET[External Document Review CC](#)**E-signature Resources**

Manage Salesforce Contracts e-signature process. Users can view list of documents sent for e-signature and recipients. Update e-signature envelope status, notification settings and get e-signature signer roles.

Available resources are:

Resource	Description
/connect/e-sign/signature-requests/{sourceObjectId}/envelope/send	Send document envelope to vendor for e-signature.
/connect/e-sign/documents	View a list of documents sent for e-signature.
/connect/e-sign/signature-requests/{sourceObjectId}/envelopes/status	Update e-signature envelope status.
/connect/e-sign/signature-requests/{sourceObjectId}/envelopes/void	Expire or void envelopes associated with an object.
/connect/e-sign/recipients	Get list of e-signature recipients.
/connect/e-sign/notification-settings	Get e-signature notification settings.
/connect/e-sign/signer-roles	Get e-signature signer roles.

[E-signature Document List](#)

View a list of documents sent for e-signature.

[E-signature Envelope](#)

Send document envelope to vendor for e-signature.

[E-signature Envelope Status](#)

Update e-signature envelope status.

[E-signature Envelope Void](#)

Expire or void envelopes associated with an object.

[E-signature Notification](#)

Get e-signature notification settings.

[E-signature Recipients](#)

Get list of e-signature recipients.

[E-signature Signer Roles](#)

Get e-signature signer roles.

E-signature Document List

View a list of documents sent for e-signature.

Resource

```
/connect/e-sign/documents
```

Available version

56.0

HTTP methods

GET

Example

```
https://yourInstance.salesforce.com/services/data/v56.0/connect/e-sign/documents?sourceObjectId={sourceObjectId}&documentSelector={customClassName}
```

Request parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
documentSelector	String	Specifies which class is executed. Use this when you want to define a custom class other than the default class or the one already defined for DocuSignDocumentSelector.	Optional	56.0
sourceObjectId	String	Record ID of the object.	Required	56.0

Response body for GET

[Document List Response](#)

E-signature Envelope

Send document envelope to vendor for e-signature.

Resource

```
/connect/e-sign/signature-requests/${sourceObjectId}/envelope/send
```

Available version

56.0

HTTP methods

POST

Example

```
https://yourInstance.salesforce.com/services/data/v56.0/connect/e-sign/signature-requests/{sourceObjectId}/envelope/send
```

JSON example

```
{
  "emailSettings" : { // API: required, UI: required
    "emailSubject": "", // API: required,
    "emailBody": ""
  },
  "vendor": "DocuSign", // API: required,
  "recipients": { // API: required,
    "signers": [ // API: required,
      {
        "name": "", // API: required,
        "email": "", // API: required,
        "routingOrder": "", // API: required,
        "recipientId": "", // API: required,
        "signerRole": "", // API: required,
        "recipientType": "", // API: required,
        "recipientLocale": "",
        "phone": "",
        "emailNotification": {
          "emailSubject": "",
          "emailBody": ""
        }
      }
    ]
  }
}
```

```

        "supportedLanguage": ""
      }
    }
  ],
  "inPersonSigners": [{
    "name": "",
    "email": "",
    "routingOrder": "",
    "recipientId": "",
    "signerRole": "",
    "emailNotification": {
      "emailSubject": "",
      "emailBody": "",
      "supportedLanguage": ""
    }
  }
],
  "certifiedDeliveries": [{
    "name": "",
    "email": "",
    "routingOrder": "",
    "recipientId": "",
    "signerRole": "",
    "emailNotification": {
      "emailSubject": "",
      "emailBody": "",
      "supportedLanguage": ""
    }
  }
],
  "carbonCopies": [{
    "name": "",
    "email": "",
    "routingOrder": "",
    "recipientId": "",
    "signerRole": "",
    "emailNotification": {
      "emailSubject": "",
      "emailBody": "",
      "supportedLanguage": ""
    }
  }
]
},
"documents": [{ // API: required
  "name": "", // API: required,
  "sourceId": "", // API: required,
  "fileExtension": "", // API: required,
  "sourceType": "", // API: required,
  "documentId": "" // API: required,
}
],
"notificationSettings": {
  "useAccountDefaults": "",

```

```

    "reminders": {
      "reminderEnabled": "",
      "reminderDelay": "",
      "reminderFrequency": ""
    },
    "expirations": {
      "expireEnabled": "",
      "expireAfter": "",
      "expireWarn": ""
    }
  }
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
documents	Envelope Send Documents Request[]	Array of documents to send.	Required	56.0
emailSettings	Envelope Send Email Settings Request	Email settings.	Required	56.0
notificationSettings	Envelope Send Notification Request	Notification settings.	Optional	56.0
parentId	String	ID of the parent object.	Optional	56.0
recipients	Envelope Send Recipients Request	Map of different recipients.	Required	56.0
vendor	String	Vendor name.	Required	56.0

Request parameters for POST

Parameter Name	Type	Description	Required or Optional	Available Version
envelope	Object	E-signature envelope containing information of the document.	Required	56.0

Response body for POST

[Envelope Send Response](#)

E-signature Envelope Status

Update e-signature envelope status.

Resource

```
/connect/e-sign/signature-requests/{sourceObjectId}/envelopes/status
```

Available version

56.0

HTTP methods

PATCH

Example

```
https://yourInstance.salesforce.com/services/data/v56.0/connect/e-sign/signature-requests/{sourceObjectId}/envelopes/status
```

Response body for PATCH[Envelope Status List Response](#)**E-signature Envelope Void**

Expire or void envelopes associated with an object.

Resource

```
/connect/e-sign/signature-requests/{sourceObjectId}/envelopes/void
```

Available version

56.0

HTTP methods

PATCH

Example

```
https://yourInstance.salesforce.com/services/data/v56.0/connect/e-sign/signature-requests/{sourceObjectId}/envelopes/void
```

JSON example

```
{
  "voidedReason": "", //required
  "senderEmail": ""
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
senderEmail	String	Refers to the email of the user who initiated the voiding.	Optional	56.0
voidedReason	String	Reason for which the envelope is being voided.	Required	56.0

Response body for PATCH[Envelope Void Response](#)

E-signature Notification

Get e-signature notification settings.

Resource

```
/connect/e-sign/notification-settings
```

Available version

56.0

HTTP methods

GET

Example

```
https://yourInstance.salesforce.com/services/data/v56.0/connect/e-sign/notification-settings?sourceObjectId=<sourceObjectId>
```

Request parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
sourceObjectId	String	Object ID of the document.	Required	56.0

Response body for GET

[Notification Setting Response](#)

E-signature Recipients

Get list of e-signature recipients.

Resource

```
/connect/e-sign/recipients
```

Available version

56.0

HTTP methods

GET

Example

```
https://yourInstance.salesforce.com/services/data/v56.0/connect/e-sign/recipients?sourceObjectId=<sourceObjectId>&recipientSelector=<recipientSelector>&recipientCustomClass=<recipientCustomClass>
```

Request parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
recipientSelector	String	Create a list of recipients that receive the DocuSign envelope for signing or viewing for a custom object.	Optional	56.0
sourceObjectId	String	Object Id of the document.	Optional	56.0

Response body for GET[Recipient List Response](#)**E-signature Signer Roles**

Get e-signature signer roles.

Resource

```
/connect/e-sign/signer-roles
```

Available version

56.0

HTTP methods

GET

Example for GET

```
https://yourInstance.salesforce.com/services/data/v56.0/connect/e-sign/signer-roles
```

Response body for GET[E-Signature Signer Roles](#)**Request Bodies**

Here's a list of Salesforce Contracts API request bodies.

[Content Link Input](#)

Input representation of the request to fetch the content token data from the ContentLink object.

[Contract Action Input](#)

Input to get action details for the contract.

[Contract Input](#)

Input to create and update contract.

[Document Template Request](#)

Input representation of a document template resource.

[Document Template Update Input](#)

Input representation to update document template.

[Envelope Documents Input](#)

Input to get document details for e-signature.

[Envelope Email Notification Input](#)

Input to get email notification details.

[Envelope Email Settings Input](#)

Email settings input to get email details from API.

[Envelope Notification Expiration Input](#)

Input to get notification expiration information.

[Envelope Notification Reminder Input](#)

Input to get notification reminder information for e-signature document.

[Envelope Notification Input](#)

Input to get notification information for e-signature.

[Envelope Recipient Details Input](#)

Input to get recipient details.

[Envelope Recipients Input](#)

Input to get different recipients list.

[Envelope Send Input](#)

Input request to send e-signature details from API.

[Envelope Void Input](#)

Input to get void envelope related details.

[External Document Creation Input](#)

Input representation of the request to create an external document.

[External Document Metadata](#)

Input representation of external document metadata.

[Extraction Context Attribute Mapping Input](#)

Input representation of attribute mappings used in the extraction context.

[Extraction Context Mapping Input](#)

Input representation of a extraction context mapping.

[Extraction Context Use Case Mapping Input](#)

Input representation of the use case-mapping configuration in the extraction context.

[Object Reference Input](#)

Input representation of object reference.

[Section Input](#)

Input representation of a section.

[Save External Document Input](#)

Input representation to save external document to salesforce.

[Template Input](#)

Input representation to get contract document related details.

[Usages Input](#)

Input representation of usages.

Content Link Input

Input representation of the request to fetch the content token data from the ContentLink object.

JSON example

```
{
  "referenceObjectId": "a0X4W00000X8jklUAB",
  "contentLinkIds": [
    "0D56A000008yhfSAAQ",
    "0D56A000008yhgTABQ"
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
contentLinkIds	String[]	List of the content link IDs to fetch the data.	Optional	62.0
referenceObjectId	String	ID of the reference object to retrieve the content data.	Optional	62.0

Contract Action Input

Input to get action details for the contract.

JSON example

```
{
  "actionApiName" : "updateEnvelopeStatus",
  ... "actionId" : //object state action definition id,
  "actionData":{
    "isUpdateEnvelopeStatusSuccess": true
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
actionApiName	String	API name for respective contract action.	Optional	57.0
actionId	String	ID for Object state Action Definition record.  Note: For the list of all standard actions supported, refer Predefined Dynamic (Contract) Actions .	Optional	57.0
actionData	Map<String, String>	Action body with supported format string.	Optional	57.0

 **Note:** For any request, either `actionApiName` or `actionId` must be passed. If none passed, the application raises an exception.

Contract Input

Input to create and update contract.

JSON example for creating and updating contract

```
{
```

```

"sourceObjectId" : "006xx000001a4KaAAI",
"templateName" : "Value1",
"isAutoDocgenRequired" :true/false
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
isAutoDocgenRequired	Boolean	Specifies whether automatic document generation is required or not.	Required	56.0
recordTypeName	String	Contract record type name.	Optional	56.0
sourceObjectId	String	Source record ID.	Required	56.0
templateName	String	Document template name for document generation.	Optional	56.0

Document Template Request

Input representation of a document template resource.

JSON example

```

{
  "name": "TemplateName",
  "type": "MicrosoftWord/MicrosoftPowerpoint/Microsoft365Word",
  "tokenMappingMethodType": "OmniDataTransform",
  "tokenMappingType": "JSON",
  "extractOmniDataTransformName": "ExtractName",
  "mapperOmniDataTransformName": "MapperName",
  "contentDocumentId": "069xx0000004CyeAAE",
  "documentGenerationMechanism": "ServerSide",
  "usageType": "Contract_Lifecycle_Management",
  "tokenList": "token1,token2,token3"
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
contentDocumentId	String	ID of the Document associated with a document template.	Optional	60.0
documentGenerationMechanism	String	Method for generating the document.	Optional	60.0
extractOmniDataTransformName	String	Name of the OmniDataTransform bundle of the extract type.	Optional	60.0

Name	Type	Description	Required or Optional	Available Version
mapperOmniDataTransformName	String	Name of the OmniDataTransform bundle of the mapper type.	Optional	60.0
name	String	Name of the document template.	Required	60.0
tokenList	String	List of tokens present in the document template.	Optional	60.0
tokenMappingMethodType	String	Processing method for the data that can originate from same source object.	Required	60.0
tokenMappingType	String	Mapping type for tokens of the document template.	Required	60.0
type	String	Type of document template.	Required	60.0
usageType	String	Usage type of the document template.	Optional	60.0

Document Template Update Input

Input representation to update document template.

JSON example

```
{
  "isActive": "false",
  "status": "Draft",
  "documentGenerationMechanism": "ClientSide",
  "extractOmniDataTransformName": "Extractor",
  "mapperOmniDataTransformName": "Mapper",
  "shouldDisplayUnmappedToken": "false",
  "tokenList": "token1,token2,token3",
  "tokenMappingMethodType": "OmniDataTransform",
  "usageType": "Contract_Lifecycle_Management",
  "contentDocumentId": "069xxxxxxxxxxxxxxxxx"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
contentDocumentId	String	ID of the document associated with a document template.	Optional	60.0
documentGenerationMechanism	String	Method for generating the document.	Optional	60.0

Name	Type	Description	Required or Optional	Available Version
<code>extractOmniDataTransformName</code>	String	Name of the OmniDataTransform bundle of the extract type.	Optional	60.0
<code>isActive</code>	Boolean	Indicates whether the document template is set to active (<code>true</code>) or inactive (<code>false</code>).	Optional	60.0
<code>mapperOmniDataTransformName</code>	String	Name of the OmniDataTransform bundle of the mapper type.	Optional	60.0
<code>shouldDisplayUnmappedToken</code>	Boolean	Indicates whether the document template unmapped tokens be displayed (<code>true</code>) or not (<code>false</code>).	Optional	60.0
<code>status</code>	String	Status to be set for the document template.	Optional	60.0
<code>tokenList</code>	String	List of tokens present in the document template.	Optional	60.0
<code>tokenMappingMethodType</code>	String	Processing method for data that can originate from the same source object.	Optional	60.0
<code>usageType</code>	String	Usage type of the document template.	Optional	60.0

Envelope Documents Input

Input to get document details for e-signature.

Properties

Name	Type	Description	Required or Optional	Available Version
<code>documentId</code>	String	Document ID.	Required	56.0
<code>fileExtension</code>	String	File extension type.	Required	56.0
<code>name</code>	String	Name of document.	Required	56.0
<code>sourceId</code>	String	Object ID of the document.	Required	56.0
<code>sourceType</code>	String	Object type of the document object.	Required	56.0

Envelope Email Notification Input

Input to get email notification details.

Properties

Name	Type	Description	Required or Optional	Available Version
emailBody	String	Email message sent to recipient.	Optional	56.0
emailSubject	String	Email subject.	Optional	56.0
supportedLanguage	String	Simple type supported language.	Optional	56.0

Envelope Email Settings Input

Email settings input to get email details from API.

Properties

Name	Type	Description	Required or Optional	Available Version
emailBody	String	Email message sent to recipient.	Optional	56.0
emailSubject	String	Email subject.	Required	56.0

Envelope Notification Expiration Input

Input to get notification expiration information.

Properties

Name	Type	Description	Required or Optional	Available Version
expireAfter	String	An integer specifying the number of days that a sent envelope remains active before it expires.	Optional	56.0
expireEnabled	String	Indicates whether or not the envelope is no longer available for signing after the specified number of days after it was sent.	Optional	56.0
expireWarn	String	Integer that specifying the number of days before the envelope expires that an expiration warning email is sent to the recipient; if set to 0 (zero), no warning email is sent.	Optional	56.0

Envelope Notification Reminder Input

Input to get notification reminder information for e-signature document.

Properties

Name	Type	Description	Required or Optional	Available Version
reminderDelay	String	Reminder delay.	Optional	56.0
reminderEnabled	String	Reminder enabled.	Optional	56.0
reminderFrequency	String	Reminder frequency.	Optional	56.0

Envelope Notification Input

Input to get notification information for e-signature.

Properties

Name	Type	Description	Required or Optional	Available Version
expirations	Envelope Send Notification Expirations Request	Expiration settings.	Optional	56.0
reminders	Envelope Send Notification Reminders Request	Reminder settings.	Optional	56.0
useAccountDefaults	Boolean	Indicates whether or not the account defaults for notifications must be used by the envelope [true false].	Optional	56.0

Envelope Recipient Details Input

Input to get recipient details.

Properties

Name	Type	Description	Required or Optional	Available Version
accessCode	String	Specifies the access code a recipient has to enter to validate identity.	Optional	56.0
email	String	Email address of the recipients.	Required	56.0
emailNotification	EnvelopeSendEmail NotificationRequest	Complex type that has information for setting the language for the recipients email information (if provided for one recipient it overrides the emailSubject and emailBody, also you must provide emailNotification for all recipients).	Optional	56.0

Name	Type	Description	Required or Optional	Available Version
id	String	Recipient Id.	Optional	56.0
name	String	Name of the document.	Required	56.0
parentSignerName	String	Parent signer name for in person signers.	Optional	56.0
phone	String	Phone number of the signer.	Optional	56.0
recipientId	String	Recipient Id.	Required	56.0
recipientLocale	String	Recipient locale.	Optional	56.0
recipientType	String	Recipient type.	Required	56.0
routingNumber	Integer	Routing number.	Optional	56.0
routingOrder	Integer	Specifies the routing order of the recipient in the envelope.	Required	56.0
signerRole	Integer	Indicates the index or order of the signer in the signature tabs.	Required	56.0
title	String	Title of the signer.	Optional	56.0

Envelope Recipients Input

Input to get different recipients list.

Properties

Name	Type	Description	Required or Optional	Available Version
carbonCopies	Envelope Send Recipient Detail Request[]	Carbon copy user details.	Optional	56.0
certifiedDeliveries	Envelope Send Recipient Detail Request[]	Certificate deliveries details.	Optional	56.0
inPersonSigners	Envelope Send Recipient Detail Request[]	In person signer details.	Optional	56.0
signers	Envelope Send Recipient Detail Request[]	Array of signer details.	Required	56.0

Envelope Send Input

Input request to send e-signature details from API.

JSON example

```
{
  "emailSettings" : { // API: required, UI: required
    "emailSubject": "", // API: required,
    "emailBody": ""
  },
  "vendor": "DocuSign", // API: required,
  "recipients": { // API: required,
    "signers": [{ // API: required,
      "name": "", // API: required,
      "email": "", // API: required,
      "routingOrder": "", // API: required,
      "recipientId": "", // API: required,
      "signerRole": "", // API: required,
      "recipientType": "", // API: required,
      "recipientLocale": "",
      "phone": "",
      "emailNotification": {
        "emailSubject": "",
        "emailBody": "",
        "supportedLanguage": ""
      }
    }
  ],
  "inPersonSigners": [{
    "name": "",
    "email": "",
    "routingOrder": "",
    "recipientId": "",
    "signerRole": "",
    "emailNotification": {
      "emailSubject": "",
      "emailBody": "",
      "supportedLanguage": ""
    }
  }
],
  "certifiedDeliveries": [{
    "name": "",
    "email": "",
    "routingOrder": "",
    "recipientId": "",
    "signerRole": "",
    "emailNotification": {
      "emailSubject": "",
      "emailBody": "",
      "supportedLanguage": ""
    }
  }
],
  "carbonCopies": [{
    "name": "",
    "email": "",
```

```

        "routingOrder": "",
        "recipientId": "",
        "signerRole": "",
        "emailNotification": {
            "emailSubject": "",
            "emailBody": "",
            "supportedLanguage": ""
        }
    }
]
},
"documents": [{ // API: required
    "name": "", // API: required,
    "sourceId": "", // API: required,
    "fileExtension": "", // API: required,
    "sourceType": "", // API: required,
    "documentId": "" // API: required,
}
],
"notificationSettings": {
    "useAccountDefaults": "",
    "reminders": {
        "reminderEnabled": "",
        "reminderDelay": "",
        "reminderFrequency": ""
    },
    "expirations": {
        "expireEnabled": "",
        "expireAfter": "",
        "expireWarn": ""
    }
}
}
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
documents	Envelope Send Documents Request[]	Array of documents to send.	Required	56.0
emailSettings	Envelope Send Email Settings Request	Email settings.	Required	56.0
notificationSettings	Envelope Send Notification Request	Notification settings.	Optional	56.0
parentId	String	ID of the parent object.	Optional	56.0
recipients	Envelope Send Recipients Request	Map of different recipients.	Required	56.0

Name	Type	Description	Required or Optional	Available Version
vendor	String	Vendor name.	Required	56.0

Envelope Void Input

Input to get void envelope related details.

JSON example

```
{
  "voidedReason": "", //required
  "senderEmail": ""
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
senderEmail	String	Refers to the email of the user who initiated the voiding.	Optional	56.0
voidedReason	String	Reason for which the envelope is being voided.	Required	56.0

External Document Creation Input

Input representation of the request to create an external document.

JSON example

```
{
  "refObjectId": "",
  "contentversionId": "",
  "documentNamePrefix": "namespaceprefix",
  "isAsync": true
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
contentVersionId	String	Content version ID of the document using which new external document is created.	Required	58.0
documentNamePrefix	String	Document name prefix, which is required to name the newly created external document.	Optional	58.0

Name	Type	Description	Required or Optional	Available Version
isAsync	String	Determines the way the external document gets created.	Optional	58.0
refObjectId	String	ID of the reference object. This can be either a document template or a contract ID.	Optional	58.0

External Document Metadata

Input representation of external document metadata.

Properties

Name	Type	Description	Required or Optional	Available Version
objectReferences	Object Reference Input[]	Object references list	Optional	58.0
sections	Section Input[]	Section list	Optional	59.0

Extraction Context Attribute Mapping Input

Input representation of attribute mappings used in the extraction context.

JSON example

```
{
  "contextAttributeMapping": [
    {
      "attributeId": "11nxx000001hOozAAE",
      "description": "extract startDate from the document"
    },
    {
      "attributeId": "11nxx000001hOozAAV",
      "description": "extract startDate from the document"
    },
    {
      "attributeId": "11nxx000001hOozAAR",
      "description": "extract startDate from the document"
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
attributeId	String	ID of the context attribute mapping required for update.	Required	61.0

Name	Type	Description	Required or Optional	Available Version
description	String	Description of what the attribute maps to.	Optional	61.0

Extraction Context Mapping Input

Input representation of a extraction context mapping.

JSON example

```
{
  "ContextUsecaseMapping": {
    "templateName": "ContractExtractionTemplate",
    "contextDefinitionDeveloperName": "ContractExtractionContextDefinition",
    "mappingName": "ContractExtractionMappingName",
    "targetObject": "Contract",
    "recordType": "CLM"
  },
  "contextAttributeMapping": [
    {
      "attributeId": "11nxx000001hOozAAE",
      "description": "extract startDate from the document"
    },
    {
      "attributeId": "11nxx000001hOozAAV",
      "description": "extract startDate from the document"
    },
    {
      "attributeId": "11nxx000001hOozAAR",
      "description": "extract startDate from the document"
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
contextAttributeMapping	Extraction Context Attribute Mapping Input[]	List of attributes and their mappings.	Yes	61.0
contextUsecaseMapping	Extraction Context Use Case Mapping Input	Details of the use case for which the mapping is defined.	Yes	61.0

Extraction Context Use Case Mapping Input

Input representation of the use case-mapping configuration in the extraction context.

JSON example

```
{
  "ContextUsecaseMapping": {
    "templateName": "ContractExtractionTemplate",
    "contextDefinitionDeveloperName": "ContractExtractionContextDefinition",
    "mappingName": "ContractExtractionMappingName",
    "targetObject": "Contract",
    "recordType": "CLM"
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
contextDefinitionDeveloperName	String	Developer name of the context definition.	Required	61.0
mappingName	String	Name of the mapping.	Required	61.0
recordType	String	Type of the record involved in the mapping.	Required	61.0
targetObject	String	SObject that the data maps to.	Required	61.0
templateName	String	Name of the template used for the mapping.	Required	61.0

Object Reference Input

Input representation of object reference.

Properties

Name	Type	Description	Required or Optional	Available Version
objectId	String	ObjectId		58.0
objectType	String	ObjectType		58.0
usages	Usages Input	Usages		59.0

Section Input

Input representation of a section.

Properties

Name	Type	Description	Required or Optional	Available Version
guid	String	GUID		59.0
isReadOnly	Boolean	IsReadOnly		59.0
name	String	Name		59.0

Save External Document Input

Input representation to save external document to salesforce.

JSON example

```
{
  "externalDocumentId" : "id",
  "isAsync" : "false",
  "metadata": {
    "sections" : [
      {
        "guid": "guid1",
        "name": "test1",
        "isReadOnly": false
      },
      {
        "guid": "guid2",
        "name": "test2",
        "isReadOnly": false
      }
    ],
    "objectReferences" :[
      {
        "objectType": "clause",
        "objectId": "clauseid1",
        "usages": {
          "sectionIds": [
            "guid1",
            "guid2"
          ],
          "usedInDocument": true
        }
      },
      {
        "objectType": "clause",
        "objectId": "clauseid2",
        "usages": {
          "sectionIds": [
            "guid1",
            "guid2"
          ]
        }
      }
    ]
  }
}
```

```

        "usedInDocument": false // points to if this object is used in
document as well without sections
    }
}
]
}
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
externalDocumentId	String	ID of an external document.	Required	58.0
isAsync	Boolean	Is Async	Required	58.0
metadata	External Document Metadata	Metadata	Optional	58.0

Template Input

Input representation to get contract document related details.

JSON example

```

{
  "templateId": "2dtxx0000000004rAAA",
  "isExternalReviewImport": false,
  "externalReviewType": "OnlineMicrosoft365"
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
externalReviewType	String	Type of external review. Possible values are: - OnlineMicrosoft365 - OfflineMicrosoftWord	Optional	60.0
isExternalReviewImport	Boolean	Indicates whether the checkout is for an external review import (<code>true</code>) or not (<code>false</code>).	Optional	59.0
pdfDocumentId	String	ID for Contract PDF document.	Optional	56.0
templateId	String	Template ID with key prefix 2dt used to generate document.	Required	56.0
wordDocumentId	String	ID for Contract word document.	Optional	56.0

Usages Input

Input representation of usages.

Properties

Name	Type	Description	Required or Optional	Available Version
sectionIds	String[]	Section IDs		59.0
usedInDocument	Boolean	UsedInDocument		59.0

Response Bodies

Here's a list of Salesforce Contracts response bodies.

[Clause Library Category Response](#)

Output representation of the request to retrieve the clause library category configuration.

[Clause Category Response](#)

Output representation of the field-level details for a clause category.

[Clause Library Category Response](#)

Response for getting Clause Library Category configuration.

[Content Document](#)

Output representation of the content document record.

[Content Document List](#)

Output representation of the content document record list.

[Content Document Response](#)

Output representation of the individual content documents.

[Content Link List](#)

Output representation of the content data for the specified reference IDs.

[Content Link Detail](#)

Output representation of the content link details for the specified reference IDs.

[Contract Action List](#)

List of contract actions.

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Contract action response for a particular contract ID.

[Contract Document Version](#)

Contract document version record.

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Output representation of the latest details of a contract document version, including its ID, status, and associated documents and attachments.

[Contract Document Versions List](#)

Contract document versions record list.

[Contract List](#)

Contract list.

[Document Clause Fields Response](#)

Output representation for the list of document clause fields.

[Document Clause Set List Response](#)

Output representation for the list of document clause set.

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Output representation of the details of a clause set.

[Document Generate](#)

Output Representation of document generation record.

[Document Generation Process Status](#)

Status of the document generation process.

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Output representation of recipient status and sequence information for the signers.

[Document Record](#)

Document record.

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Output representation for the document template list.

[Document Template Parent](#)

Output representation of the document template parent record.

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Output representation of the document template child record.

[Document Template](#)

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[Envelope Details](#)

Envelope details.

[Envelope Status List](#)

Output representation of the envelope status update request.

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Output representation of the envelope status record.

[Envelope Void](#)

Void envelope related details.

[External Document Creation Output](#)

Output representation for the create external document request.

[External Document Output](#)

Output representation of the details of an external document.

[External Document Review CC](#)

Output representation for external document version review.

[Extraction Context Attribute](#)

Output representation of extraction context attribute mapping.

[Extraction Context Definition](#)

Output representation of extraction context definition details.

[Extraction Context Mapping](#)

Output representation of mapping details within an extraction context, used to associate extracted data with specific system entities.

[Extraction Context Mapping Output](#)

Output representation of extraction context mapping.

[Extraction Context Mappings](#)

Output Representation to create and update extraction context mapping.

[Extraction Context Use Case Mapping](#)

Output representation of extraction context use case mapping.

[Failed Content Link List](#)

Output representation of the content ID and error details for the failed requests.

[Generic Output](#)

Generic output response.

[Recipient Details](#)

Recipient details.

[Recipient List](#)

List of recipients.

[Recipients Response](#)

Output representation of a recipient's personal and status information in a contract document's signing process.

[Save External Document Output](#)

Output representation for save external document operation.

[Signer Roles Details](#)

Details of the e-signature signer roles.

[Template List](#)

List of configured templates.

[Template Record](#)

Template record.

[E-signature Notification Expiration](#)

E-signature notification expiration settings.

[E-signature Notification Reminder](#)

E-signature notification reminder settings.

[E-signature Notification Settings](#)

E-signature notification settings.

Clause Library Category Response

Output representation of the request to retrieve the clause library category configuration.

JSON example

```
{
  "clauseCategories": [
    {
      "id": "0zMRO000000001s", //not a required response field
      "name": "Confidential",
      "usageType": "Contract Clause Category"
    },
    {
      "name": "Environment",
      "usageType": "Disclosure Category"
    }
  ]
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
clauseCategories	Clause Category Response[]	The list of clause category configurations.	Small, 57.0	57.0

Clause Category Response

Output representation of the field-level details for a clause category.

Property Name	Type	Description	Filter Group and Version	Available Version
id	String	The ID of the custom clause configuration.	Small, 57.0	57.0
name	String	The name of the clause configuration.	Small, 57.0	57.0
usageType	String	The usage type for the clause configuration. Possible values are: - Contract Clause Category - Disclosure Category	Small, 57.0	57.0

Clause Library Category Response

Response for getting Clause Library Category configuration.

Property Name	Type	Description	Filter Group and Version	Available Version
clauseCategories	Clause Category Response[] on page 168	Specifies list of category configurations.	Small, 57.0	57.0

Content Document

Output representation of the content document record.

Property Name	Type	Description	Filter Group and Version	Available Version
contentDocumentId	String	Record ID of content document.	Small, 56.0	56.0
contentDocumentLinkId	String	Record ID of content document link.	Small, 56.0	56.0
contractDocumentVersionId	String	Record ID of the linked contract document version object.	Small, 56.0	56.0
createdDate	String	Created date of content document.	Small, 56.0	56.0
fileExtension	String	File extension of content document.	Small, 56.0	56.0
isSharedExternally	Boolean	Indicates whether the document is available for external user access (<code>true</code>) or restricted to internal users only (<code>false</code>).	Small, 56.0	60.0
lastModifiedDate	String	Last modified date of content document.	Small, 56.0	56.0
title	String	Title of content document.	Small, 56.0	56.0

Content Document List

Output representation of the content document record list.

Property Name	Type	Description	Filter Group and Version	Available Version
contractDocumentVersionId	String	Contract document version ID for which list of content documents is fetched.	Big, 56.0	56.0
data	Content Document []	List of content document details related to the contract document version.	Big, 56.0	56.0

Content Document Response

Output representation of the individual content documents.

JSON Sample

```
{
  "contractId": "contractId_value",
  "contractDocumentVersionId": "contractDocumentVersionId_value",
  "status": "",
  "contractDocuments": [
    {
      "contentDocumentId": "contentDocumentId_value1",
      "contractDocumentVersionId": "contractDocumentVersionId_value1",
      "createdDate": "createdDate_value1",

```

```

    "fileExtension": "fileExtension_value1",
    "lastModifiedDate": "lastModifiedDate_value1",
    "title": "title_value1",
    "isSharedExternally": true
  }
],
"attachments": [
  {
    "contentDocumentId": "contentDocumentId_value2",
    "contractDocumentVersionId": "contractDocumentVersionId_value2",
    "createdDate": "createdDate_value2",
    "fileExtension": "fileExtension_value2",
    "lastModifiedDate": "lastModifiedDate_value2",
    "title": "title_value2",
    "isSharedExternally": true
  }
]
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
contentDocumentId	String	Record ID of the content document.	Small, 60.0	60.0
contentDocumentLinkId	String	Record ID of the content document link.	Small, 60.0	60.0
contractDocumentVersionId	String	Record ID of the linked ContractDocumentVersion object.	Small, 60.0	60.0
createdDate	String	Creation date of the content document.	Small, 60.0	60.0
fileExtension	String	File extension of the content document.	Small, 60.0	60.0
isSharedExternally	Boolean	Indicates if the file can be viewed by all users (<code>true</code>) or not (<code>false</code>). The default value is <code>true</code> .	Small, 60.0	60.0
lastModifiedDate	String	Last modification date of the content document.	Small, 60.0	60.0
title	String	Title of the content document.	Small, 60.0	60.0

Content Link List

Output representation of the content data for the specified reference IDs.

JSON Sample

```

{
  "contentLinkDataList": [
    {
      "contentLinkId": "0D56A000008yhfsAAQ",
      "content": "Content data here"
    }
  ]
}

```

```
    }
  ],
  "failedContentLinkList": [
    {
      "failedContentLinkId": "0D56A000008yhgTABQ",
      "failureReason": "Access denied"
    }
  ],
  "referenceObjectId": "a0X4W00000X8jklUAB"
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
contentLink DataList	Content Link Detail[]	List of content links.	Small, 62.0	62.0
failedContent LinkList	Failed Content Link List[]	List of failed content links.	Small, 62.0	62.0
reference ObjectId	String	ID of the reference object.	Small, 62.0	62.0

Content Link Detail

Output representation of the content link details for the specified reference IDs.

JSON Sample

```
{
  "contentLinkDataList": [
    {
      "contentLinkId": "0D56A000008yhfSAAQ",
      "content": "Content data here"
    }
  ]
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
content	String	Data of the fetched content.	Small, 62.0	62.0
contentLinkId	String	Record ID of the content link data.	Small, 62.0	62.0

Contract Action List

List of contract actions.

Property Name	Type	Description	Filter Group and Version	Available Version
actions	Contract Action[]	Specifies list of actions.	Big, 56.0	56.0

Property Name	Type	Description	Filter Group and Version	Available Version
contractId	String	Indicates ID of the contract.	Small, 56.0	56.0

JSON example

```
{
  "actions": [
    {
      "apiName": "cancelContract",
      "uiText": "Cancel Contract"
    },
    {
      "apiName": "submitForApproval",
      "uiText": "Submit for Approval"
    }
  ],
  "contractId": "800RO000000U7FaYAK"
}
```

Contract Action Response

Contract action response for a particular contract ID.

Property Name	Type	Description	Filter Group and Version	Available Version
apiName	String	API name for an action.	Big, 56.0	56.0
uiText	String	Localized text for an action.	Big, 56.0	56.0

Contract Document Version

Contract document version record.

Property Name	Type	Description	Filter Group and Version	Available Version
contractDocumentVersionId	String	Record ID of contract document version.	Small, 56.0	56.0
contractId	String	Record ID of parent contract.	Small, 56.0	56.0
createdByFullName	String	Status of contract document version.	Small, 56.0	56.0
createdDate	String	Created date of contract document version.	Small, 56.0	56.0
creationProcessType	String	Creation process type of contract document version.	Small, 56.0	56.0
documentTemplateId	String	Template Id used for contract document version.	Small, 56.0	56.0

Property Name	Type	Description	Filter Group and Version	Available Version
isDocumentVersionLocked	Boolean	The isDocumentVersionLocked flag of contract document version.	Small, 56.0	56.0
lastModifiedDate	String	Last modified date of contract document version.	Small, 56.0	56.0
lockType	String	Lock type of contract document version	Small, 56.0	56.0
lockedByUsername	String	Name of the user who locked the contract document version.	Small, 56.0	56.0
name	String	Version name of contract document version.	Small, 56.0	56.0
status	String	Status of contract document version.	Small, 56.0	56.0
versionNumber	String	Version number of contract document version.	Small, 56.0	56.0

Contract Document Version CC Response

Output representation of the latest details of a contract document version, including its ID, status, and associated documents and attachments.

JSON Sample

```
{
  "contractId": "contractId_value",
  "contractDocumentVersionId": "contractDocumentVersionId_value",
  "status": "",
  "contractDocuments": [
    {
      "contentDocumentId": "contentDocumentId_value1",
      "contractDocumentVersionId": "contractDocumentVersionId_value1",
      "createdDate": "createdDate_value1",
      "fileExtension": "fileExtension_value1",
      "lastModifiedDate": "lastModifiedDate_value1",
      "title": "title_value1",
      "isSharedExternally": true
    }
  ],
  "attachments": [
    {
      "contentDocumentId": "contentDocumentId_value2",
      "contractDocumentVersionId": "contractDocumentVersionId_value2",
      "createdDate": "createdDate_value2",
      "fileExtension": "fileExtension_value2",
      "lastModifiedDate": "lastModifiedDate_value2",
      "title": "title_value2",
      "isSharedExternally": true
    }
  ]
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
attachments	Content Document Response[]	Details of the list of attachments associated with the contract document version.	Big, 60.0	60.0
contract Documents	Content Document Response[]	Details of the list of documents associated with the contract.	Big, 60.0	60.0
contract Document VersionId	String	Record ID of the associated contract document version.	Small, 60.0	60.0
contract Documents	Content Document Response[]	Details of the list of documents associated with the contract.	Big, 60.0	60.0
contractId	String	Record ID of the parent contract.	Small, 60.0	60.0
name	String	Version name of the contract document version.	Small, 60.0	60.0
status	String	Status of the contract document version.	Small, 60.0	60.0

Contract Document Versions List

Contract document versions record list.

Property Name	Type	Description	Filter Group and Version	Available Version
contractId	String	Contract ID for which list of contract document versions fetched.	Big, 56.0	56.0
data	Contract Document Version Response[]	List of contract document versions details related to the contract.	Big, 56.0	56.0

Contract List

Contract list.

JSON example

```
{
  "data": ['yId1']
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
data	String[]	Record IDs of the contacts.	Small, 56.0	56.0

Document Clause Fields Response

Output representation for the list of document clause fields.

JSON example

```
{
  "fieldValues": [
    "english",
    "spanish",
    "german"
  ]
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
fieldValues	String[]	The values returned for the document clause fields based on the query parameter specified in the request.	Small, 57.0	57.0

Document Clause Set List Response

Output representation for the list of document clause set.

JSON example

```
{
  "documentClauseSets": [
    {
      "id": "123",
      "name": "Governing Law",
      "category": "00x40Axgdg0538F",
      "categoryName": "Confidential",
      "defaultLanguage": "English",
      "status": "Active"
    },
    {
      "id": "124",
      "name": "Governing Market Place",
      "category": "00x40Axgdg0538F",
      "categoryName": "Confidential",
      "defaultLanguage": "English",
      "status": "Active"
    }
  ]
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
documentClauseSets	Document Clause Set Response[]	The list of document clause set.	Small, 57.0	57.0

Document Clause Set Response

Output representation of the details of a clause set.

Property Name	Type	Description	Filter Group and Version	Available Version
category	String	The category of the document clause set.	Small, 57.0	57.0
categoryName	String	The category name of the document clause set.	Small, 57.0	57.0
defaultLanguage	String	The default language of the document clause set.	Small, 57.0	57.0
id	String	The ID of the document clause set.	Small, 57.0	57.0
name	String	The name of the document clause set.	Small, 57.0	57.0
status	String	The status of the document clause set. Valid values are: • Draft • Active • Archived	Small, 57.0	57.0

Document Generate

Output Representation of document generation record.

Property Name	Type	Description	Filter Group and Version	Available Version
contentDocuments	Document Response[]	List of generated content document details associated to the contract document version.	Big, 56.0	56.0
contractDocumentVersionId	String	Record ID of contract document version.	Small, 56.0	56.0
contractId	String	Record ID of contract.	Small, 56.0	56.0
jobId	String	Job ID of generate document process en-queued after contract document version creation.	Small, 56.0	56.0

Document Generation Process Status

Status of the document generation process.

Property Name	Type	Description	Filter Group and Version	Available Version
contentDocuments	Document Response[]	List of generated content document details related to the contract document version.	Big, 56.0	56.0
contractDocumentVersionId	String	ID of the contract document version.	Small, 56.0	56.0
documentGenerationProcessId	String	ID of the document generation process.	Small, 56.0	56.0
name	String	Name of the contract document.	Small, 56.0	56.0
responseText	String	Response text.	Small, 56.0	56.0
status	String	Status of the document generation process.	Small, 56.0	56.0

Document List

Document record list.

Property Name	Type	Description	Filter Group and Version	Available Version
documents	Document Response[]	List of documents related to the source object ID.	Large, 56.0	56.0

Document Recipient Status

Output representation of recipient status and sequence information for the signers.

Sample Response

```
{
  "isCurrentUserRecipient": "true",
  "hasCurrentUserSigned": "true",
  "recipientSequence": "4",
  "preceddingSignersExists": "true",
  "preceedingSignersSigned": "true",
  "Recipients": [
    {
      "Name": "Rishyv Misrep",
      "email": "rishyv@salesforce.com",
      "status": "Signed",
      "finalStatusDateTime": ""
    }
  ]
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
contract Document VersionId	String	Record ID of the contract document version.	Small, 61.0	61.0
hasCurrent UserSigned	Boolean	Indicates whether the current user has signed the document (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code> .	Small, 61.0	61.0
isCurrent UserRecipient	Boolean	Indicates whether the current user is also a signer (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code> .	Small, 61.0	61.0
preceding SignersExists	Boolean	Indicates whether the document is signed by preceding signers (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code> .	Small, 61.0	61.0
preceding SignersSigned	Boolean	Indicates whether all preceding signers have completed their signatures (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code> .	Small, 61.0	61.0
recipient Sequence	Integer	Sequence number of the current user.	Small, 61.0	61.0
recipients	Recipients Response[]	List of all the signers involved in the contract document.	Big, 61.0	61.0

Document Record

Document record.

Response example

```
{
  "documents":
  [
    {
      "name": "docx-template",
      "sourceId": "800xx000000boTRAAY",
      "fileExtension": "docx",
      "sourceType": "Content",
      "additionalFields":
      {
        "key1": "value1"
      }
    },
    {
      "name": "annual-contract-doc",
      "sourceId": "800xx000000boQTFGS",
      "fileExtension": "pdf",
    }
  ]
}
```

```

        "sourceType": "Content",
        "additionalFields":
            {
                "key1": "value1",
                "key2": "value2"
            }
    }
]
}

```

Properties

Property Name	Type	Description	Filter Group and Version	Available Version
additionalFields	Map<String, String>	Additional fields related to document for custom implementation.	Big, 56.0	56.0
fileExtension	String	The file extension of document.	Small, 56.0	56.0
name	String	The name of document.	Small, 56.0	56.0
sourceId	String	The source ID of document.	Small, 56.0	56.0
sourceType	String	The source type of document.	Small, 56.0	56.0

Document Template List

Output representation for the document template list.

Property Name	Type	Description	Filter Group and Version	Available Version
data	Document Template Parent []	List of document template parent records.	Small, 60.0	60.0
next	String	The URL to the next page of records.	Small, 60.0	60.0
totalRecord	Integer	Total number of records fetched.	Small, 60.0	60.0

Document Template Parent

Output representation of the document template parent record.

Property Name	Type	Description	Filter Group and Version	Available Version
hasMoreVersions	Boolean	Indicates whether the document template parent record has more draft and archive versions (<code>true</code>) or not (<code>false</code>).	Small, 60.0	60.0

Property Name	Type	Description	Filter Group and Version	Available Version
isActive	Boolean	Indicates whether the the document template parent record is currently active (<code>true</code>) or not (<code>false</code>).	Small, 60.0	60.0
lastModifiedDate	String	Last modified date of the document template parent record.	Small, 60.0	60.0
name	String	Name of the document template parent record.	Small, 60.0	60.0
namespace	String	Namespace associated with the document template parent record.	Small, 60.0	60.0
type	String	Type of the document template parent record.	Small, 60.0	60.0
usageType	String	Usage type of the document template parent record.	Small, 60.0	60.0
versions	Document Template Child []	List of versions associated to the document template parent record.	Small, 60.0	60.0

Document Template Child

Output representation of the document template child record.

Property Name	Type	Description	Filter Group and Version	Available Version
id	String	ID of the document template child record.	Small, 60.0	60.0
lastModified	String	Last modified date of the document template child record.	Small, 60.0	60.0
name	String	Name of the document template child record.	Small, 60.0	60.0
status	String	Status of the document template child record.	Small, 60.0	60.0

Document Template

Output representation for the document template record.

Property Name	Type	Description	Filter Group and Version	Available Version
documentTemplateId	String	ID of the document template record.	Small, 60.0	60.0

Envelope Details

Envelope details.

Property Name	Type	Description	Filter Group and Version	Available Version
envelopeId	String	Envelope ID for the ongoing DocuSign transaction.	Small, 56.0	56.0
envelopeStatus	String	Envelope status for the ongoing DocuSign transaction.	Small, 56.0	56.0

Envelope Status List

Output representation of the envelope status update request.

JSON example

```
{
  "totalEnvelopesToBeUpdated": "",
  "totalEnvelopesUpdated": "",

  "signatureStatus": {
    "envelopeId1": {
      "success": false,
      "error": "errorcode",
      "message": "errormessage"
    },
    "envelopeId2": {
      "success": true,
      "status": "Completed"
    }
  }
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
signatureStatus	Envelope Status[]	List of all the envelope IDs with their status.	Small, 56.0	56.0
sourceObjectId	String	ID of the parent object.	Small, 56.0	56.0
totalEnvelopesToBeUpdated	Integer	Total number of envelopes to be updated.	Small, 56.0	56.0
totalEnvelopesUpdated	Integer	Actual count of envelopes updated.	Small, 56.0	56.0

Envelope Status

Output representation of the envelope status record.

Property Name	Type	Description	Filter Group and Version	Available Version
envelopeId	String	The ID of the envelope for which the e-signature status is updated.	Small, 56.0	56.0
error	String	Error code corresponding to the envelope ID.	Small, 56.0	56.0

Property Name	Type	Description	Filter Group and Version	Available Version
errorMessage	String	Error message corresponding to the envelope ID.	Small, 56.0	56.0
status	String	Updated envelope status.	Small, 56.0	56.0
success	Boolean	Indicates whether the envelope is successfully updated (<code>true</code>) or not (<code>false</code>).	Small, 56.0	56.0

Envelope Void

Void envelope related details.

Property Name	Type	Description	Filter Group and Version	Available Version
failedEnvelopeList	Envelope Status[]	List of envelopes that failed to void and their details.	Small, 56.0	56.0
sourceObjectId	String	ID of the parent object.	Small, 56.0	56.0
successfulEnvelopeIds	String[]	ID of envelopes successfully voided.	Small, 56.0	56.0
totalEnvelopesToBeVoided	Integer	Total number of envelopes to be voided.	Small, 56.0	56.0
totalEnvelopesVoided	Integer	Actual count of envelopes voided.	Small, 56.0	56.0

External Document Creation Output

Output representation for the create external document request.

JSON example

```
{
  "isSuccess": true,
  "message": "",
  "ssoLinkUrl": "",
  "ExternalDocumentDTO": {
    "contentVersionId": "",
    "ExternalDocumentId": "",
    "ExternalUserId": "",
    "referenceObjectId": "",
    "referenceObjectType": "",
    "url": "",
    "eTag": ""
  }
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
externalDocumentDetails	Object	Details of the external document record that is created.	Small, 58.0	58.0
isSuccess	Boolean	Indicates whether the external document is created successful (<code>true</code>) or not (<code>false</code>).	Small, 58.0	58.0
message	String	Provides a description of the error message in case of failure	Small, 58.0	58.0
ssoLinkUrl	String	<Need description>.	Small, 58.0	58.0

External Document Output

Output representation of the details of an external document.

JSON example

```
{
  "contentVersionId": "",
  "externalDocumentId": ""
  "externalUserId": ""
  "referenceObjectId": ""
  "referenceObject": ""/ContractDocumentVersion", "DocumentTemplate"
  "url": ""
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
contentVersionId	String	ID of the salesforce content version.	Small, 58.0	58.0
externalDocumentId	String	ID of the external document record.	Small, 58.0	58.0
externalUserId	String	ID of an external user.	Small, 58.0	58.0
referenceObject	String	API name for salesforce reference object.	Small, 58.0	58.0
referenceObjectId	String	ID of the salesforce reference object.	Small, 58.0	58.0
url	String	URL for the external document.	Small, 58.0	58.0

External Document Review CC

Output representation for external document version review.

Sample Response

```
{
  "contentVersionId": "11RSB0000008rQX2AY",
  "externalDocumentId": "11nSB000001as69YAA",
```

```

    "contractDocumentVersionId": "a3k5g000000QyRSAA0",
    "url": "https://www.salesforce.com",
    "isReviewCompletedByCurrentUser": "true"
  }

```

Property Name	Type	Description	Filter Group and Version	Available Version
contentVersionId	String	Record ID of content version associated with an external document.	Small, 61.0	61.0
contractDocumentVersionId	String	Record ID of the contract document version.	Small, 61.0	61.0
externalDocumentId	String	Record ID of the external document.	Small, 61.0	61.0
isReviewCompletedByCurrentUser	Boolean	Indicates whether the current user has completed the review for the document (<code>true</code>) or not (<code>false</code>).	Small, 61.0	61.0
url	String	URL of the external document.	Big, 61.0	61.0

Extraction Context Attribute

Output representation of extraction context attribute mapping.

Sample Response

```

{
  "contextAttributeMapping": [
    {
      "attributeName": "ContractName",
      "attributeId": "11nxx000001hOozAAE",
      "targetObjectField": "Contract",
      "description": "extract startDate from the document",
      "isCustom": false
    },
    {
      "attributeName": "ContractCustomField",
      "attributeId": "11nxx000001hOozAAE",
      "targetObjectField": "Contract",
      "description": "extract startDate from the document",
      "isCustom": true
    },
    {
      "attributeName": "Description",
      "attributeId": "11nxx000001hOozAAE",
      "targetObjectField": "Contract",
      "description": "extract startDate from the document",
      "isCustom": false
    }
  ]
}

```

```
]
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
attributeId	String	ID of the extraction context attribute.	Small, 61.0	61.0
attributeName	String	Name of the extraction context attribute.	Small, 61.0	61.0
description	String	Description of the extraction attribute mapping.	Small, 61.0	61.0
isCustom	Boolean	Indicates whether the attribute is a custom field (<code>true</code>) or not <code>false</code> .	Small, 61.0	61.0
target ObjectField	String	Target object field mapped to the attribute.	Small, 61.0	61.0

Extraction Context Definition

Output representation of extraction context definition details.

Sample Response

```
{
  "developerName": "CLM_Contract_Definition",
  "id": "a3j5g000000PxQLAA0",
  "name": "Contract Definition"
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
developerName	String	Developer name of the extraction context definition.	Small, 61.0	61.0
id	String	ID of the context definition.	Small, 61.0	61.0
name	String	Name of the context definition.	Small, 61.0	61.0

Extraction Context Mapping

Output representation of mapping details within an extraction context, used to associate extracted data with specific system entities.

Sample Response

```
{
  "id": "a3k5g000000QyRSAA0",
  "name": "Contract Mapping"
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
id	String	ID of the extraction context mapping.	Small, 61.0	61.0
name	String	Name of the extraction context mapping.	Small, 61.0	61.0

Extraction Context Mapping Output

Output representation of extraction context mapping.

Sample Response

```
{
  "contextUseCaseMapping": {
    "templateName": "ContractExtractionTemplate",
    "targetObject": "Contract",
    "recordType": "CLM",
    "contextDefinitionName": {
      "id": "110xx0000007MnhEAE",
      "developerName": "David Taylor",
      "name": "Dav"
    },
    "contextMapping": {
      "id": "110xx0000007MnhEAE",
      "name": "David Taylor"
    }
  },
  "contextAttributeMapping": [
    {
      "attributeName": "ContractName",
      "attributeId": "11nxx000001hOozAAE",
      "targetObjectField": "Contract",
      "description": "extract startDate from the document",
      "isCustom": false
    },
    {
      "attributeName": "ContractCustomField",
      "attributeId": "11nxx000001hOozAAE",
      "targetObjectField": "Contract",
      "description": "extract startDate from the document",
      "isCustom": true
    },
    {
      "attributeName": "Description",
      "attributeId": "11nxx000001hOozAAE",
      "targetObjectField": "Contract",
      "description": "extract startDate from the document",
      "isCustom": false
    }
  ],
  "isSuccess": true,
  "contextUseCaseMappingId": "ContextUseCaseMappingId"
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
contextAttributeMapping	Context Attribute Mapping[]	List of extraction context attribute mappings..	Small, 61.0	61.0
contextUseCaseMapping	Extraction Context Use Case Mapping	Details of extraction context use case mapping.	Small, 61.0	61.0
contextUseCaseMappingId	String	Record ID of the context use case mapping.	Small, 61.0	61.0
isSuccess	Boolean	Indicates whether the retrieval of mapping was successful (<code>true</code>) or not <code>false</code> .	Small, 61.0	61.0

Extraction Context Mappings

Output Representation to create and update extraction context mapping.

Sample Response

```
{
  "id": "map123",
  "isSuccess": true,
  "message": ""
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
id	String	ID of the created mapping.	Small, 61.0	61.0
isSuccess	Boolean	Indicates whether the mapping creation was successful (<code>true</code>) or not (<code>false</code>).	Small, 61.0	61.0
message	String	Details of any error or warning messages.	Small, 61.0	61.0

Extraction Context Use Case Mapping

Output representation of extraction context use case mapping.

Sample Response

```
{
  "contextUseCaseMapping": {
    "templateName": "ContractExtractionTemplate",
    "targetObject": "Contract",
    "recordType": "CLM",
    "contextDefinitionName": {
      "id": "110xx0000007MnhEAE",
      "developerName": "David Taylor",

```

```

    "name": "Dav"
  },
  "contextMapping": {
    "id": "11Oxx0000007MnhEAE",
    "name": "David Taylor"
  }
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
context Definition	Extraction Context Definition	Details of the extraction context definition.	Small, 61.0	61.0
context Mapping	Extraction Context Mapping	Details of the extraction context mapping.	Small, 61.0	61.0
recordType	String	Name of the record type associated with the use case mapping.	Small, 61.0	61.0
targetObject	String	Name of the target object for the use case mapping.	Small, 61.0	61.0
templateName	String	Name of the template associated with the use case mapping.	Small, 61.0	61.0

Failed Content Link List

Output representation of the content ID and error details for the failed requests.

JSON Sample

```

{
  "failedContentLinkList": [
    {
      "failedContentLinkId": "0D56A0000008yhgTABQ",
      "failureReason": "Access denied"
    }
  ]
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
failedContent LinkId	String	ID of the content link associated with the failure.	Small, 62.0	62.0
failureReason	String	Reason for the API request's failure to fetch the content link.	Small, 62.0	62.0

Generic Output

Generic output response.

Property Name	Type	Description	Filter Group and Version	Available Version
id	String	ID of the content document being shared or unshared.	Small, 56.0	56.0
isSuccess	Boolean	Indicates whether the API request was successful (<code>true</code>) or not (<code>false</code>).	Small, 56.0	56.0

Recipient Details

Recipient details.

Property Name	Type	Description	Filter Group and Version	Available Version
additionalFields	Map<String,String>	Recipient additional fields.	Big, 56.0	56.0
email	String	Email address of the recipient.	Small, 56.0	56.0
id	String	Unique ID used by the tab element to indicate which recipient.	Small, 56.0	56.0
name	String	Name of the recipient.	Small, 56.0	56.0

Recipient List

List of recipients.

JSON example

```
{
  "recipients": [
    {
      "id": "xxxx",
      "name": "somename",
      "email": "someemail",
      "additionalFields": {
        "key1": "value1"
      }
    },
    .....
    {
      "id": "yyyy",
      "name": "somename1",
      "email": "someemail1",
      "additionalFields": {
        "key1": "value1"
      }
    }
  ]
}
```

```

    }
  ]
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
recipients	Recipient Details[]	List of recipients.	Big, 56.0	56.0

Recipients Response

Output representation of a recipient's personal and status information in a contract document's signing process.

Sample Response

```

{
  "Name": "Rishyv Misrep",
  "email": "rishyv@salesforce.com",
  "status": "Signed",
  "finalStatusDateTime": ""
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
declinedReason	String	Declined reason for the signature.	Small, 61.0	61.0
email	String	Email address of the recipient.	Small, 61.0	61.0
finalStatusDateTime	String	Final date and time of the current status.	Small, 61.0	61.0
name	String	Name of the recipient.	Small, 61.0	61.0
status	String	Status of the recipient.	Small, 61.0	61.0
type	String	Type of the recipient.	Small, 61.0	61.0

Save External Document Output

Output representation for save external document operation.

JSON example

```

{
  "id": "XXXXXXXX",
  "isSuccess": true,
  "message": "XYZ"
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
id	String	ID of an external document.	Small, 58.0	58.0
isSuccess	Boolean	The isSuccess flag for save external document operation.	Small, 58.0	58.0
message	String	The response message for save external document.	Small, 58.0	58.0

Signer Roles Details

Details of the e-signature signer roles.

JSON example

```
{
  "signerRoles": [
    "signer1",
    "signer2",
    "signer3",
    "signer4",
    .....
    "signerN"
  ]
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
signerRoles	String[]	Indicates the index or order of the signer in the e-signature.	Big, 56.0	56.0

Template List

List of configured templates.

Property Name	Type	Description	Filter Group and Version	Available Version
code	String	API code.	Small, 56.0	56.0
data	Template[]	List of templates.	Big, 56.0	56.0
message	String	API message.	Small, 56.0	56.0

Template Record

Template record.

Property Name	Type	Description	Filter Group and Version	Available Version
id	String	Record ID of the template.	Big, 56.0	56.0
isActive	Boolean	Status of the template.	Big, 56.0	56.0
name	String	Name of the template.	Big, 56.0	56.0
type	String	Type of the template.	Big, 56.0	56.0
version	Integer	Version of the template.	Big, 56.0	56.0

E-signature Notification Expiration

E-signature notification expiration settings.

Property Name	Type	Description	Filter Group and Version	Available Version
expireAfter	Integer	Integer specifying the number of days that a sent envelope remains active before it expires.	Small, 56.0	56.0
expireEnabled	Boolean	Indicates whether the envelope is no longer available for signing after the specified number of days after it was sent.	Small, 56.0	56.0
expireWarn	Integer	Integer that specifying the number of days before the envelope expires that an expiration warning email is sent to the recipient; if set to 0 (zero), no warning email is sent.	Small, 56.0	56.0

E-signature Notification Reminder

E-signature notification reminder settings.

Property Name	Type	Description	Filter Group and Version	Available Version
reminderDelay	Integer	Integer specifying the number of days after the recipient receives the envelope that reminder emails are sent to the recipient.	Small, 56.0	56.0
reminderEnabled	Boolean	Indicates whether a reminder is sent.	Small, 56.0	56.0
reminderFrequency	Integer	Integer specifying the interval in days between reminder emails.	Small, 56.0	56.0

E-signature Notification Settings

E-signature notification settings.

JSON example

```
{
  "useAccountDefaults": true,
  "reminders": {
    "reminderEnabled": true,
    "reminderDelay": 4,
    "reminderFrequency": 5
  },
  "expirations": {
    "expireEnabled": true,
    "expireAfter": 4,
    "expireWarn": 5
  }
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
expirations	Notification Expiration Setting	Expirations settings for notification setting.	Small, 56.0	56.0
reminders	Notification Reminder Setting	Reminder settings for notification setting.	Small, 56.0	56.0
useAccountDefaults	Boolean	Indicates whether the Account defaults for notifications should be used by the envelope [true false].	Small, 56.0	56.0

Salesforce Contracts 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](#).

[ClauseCatgConfiguration](#)

Represents the configuration about the library category that can be used by a user in their response document.

[ContractType](#)

A contract type is used to group contracts so that they exhibit similar characteristics. For example, the lifecycle states, the people who access, the templates and clauses used. This type extends the Metadata metadata type and inherits its `fullName` field.

[ESignatureConfig](#)

Represents the settings for integrating with external eSignature providers.

[ESignatureEnvelopeConfig](#)

Represents the notification-specific settings for integrating with external eSignature providers.

[ExternalDocStorageConfig](#)

Represents configuration, which admin makes in setup to specify the drive, path, and named credential to be used for storing documents on external drives.

ClauseCatgConfiguration

Represents the configuration about the library category that can be used by a user in their response document.



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 Metadata metadata type and inherits `fullName` field.

File Suffix and Directory Location

ClauseCatgConfiguration components have the suffix `.clauseCatgConfiguration` and are stored in the `clauseCatgConfigurations` folder.

Version

ClauseCatgConfiguration components are available in API version 57.0 and later.

Special Access Rules

ClauseManagementAddOn license is required.

Fields

Field Name	Description
<code>description</code>	Field Type string Description The description about the clause category configuration.
<code>isProtected</code>	Field Type boolean Description An auto-generated value that doesn't currently impact the behavior of the metadata type.
<code>masterLabel</code>	Field Type string

Field Name	Description
	Description Required. A user-friendly name for ClauseCatgConfiguration, which is defined when the ClauseCatgConfiguration is created.
usageType	Field Type ClmCategoryUsageType (enumeration of type string) Description Required. The usage type of the clause category configuration. Possible values are: - ContractClauseCategory - DisclosureCategory

Declarative Metadata Sample Definition

The following is an example of a ClauseCatgConfiguration component.

```
<?xml version="1.0" encoding="UTF-8"?>
<ClauseCatgConfiguration
  xmlns="http://soap.sforce.com/2006/04/metadata">
  <description>This is how to add description for Contract Clause Category</description>
  <usageType>ContractClauseCategory</usageType>
  <isProtected>>false</isProtected>
  <masterLabel>Contract Clause Cat</masterLabel>
</ClauseCatgConfiguration>
```

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>Pkg</fullName>
  <types>
    <members>DisclosureCategory</members>
    <members>ContractClauseCategory</members>
    <name>ClauseCatgConfiguration</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](#).

ContractType

A contract type is used to group contracts so that they exhibit similar characteristics. For example, the lifecycle states, the people who access, the templates and clauses used. This type extends the Metadata metadata type and inherits its `fullName` field.

Parent Type

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

File Suffix and Directory Location

ContractType components have the suffix `.contractType` and are stored in the `contractTypes` folder.

Version

ContractType components are available in API version 54.0 and later.

Special Access Rules

Fields

Field Name	Field Type	Description
<code>contractTypeConfigs</code>	ContractTypeConfig[]	A list of configurations for the Contract Type.
<code>isDefault</code>	boolean	Indicates whether this contract type is a default for the org. Default value is False.
<code>masterLabel</code>	string	Required. The name of the setting.
<code>subTypes</code>	string	List of subtypes for the contract object associated with this contract type.

ContractTypeConfig

Specific configuration settings defined for a Contract Type that control characteristics and behavior of all contracts of that type.

Field Name	Description
<code>configType</code>	Field Type ContractConfigType (enumeration of type string) Description Required. Indicates the name of the configuration setting. Possible value are: • <code>Append0ToAutoNbrEmbeddedSect</code> • <code>AutoGenDocOnContractUpdate</code>

Field Name	Description
	• AutoGenDocOnContractCreation • AutoGenerateDocFileType • CheckInDocFileType • CreateDocSectionsDocxTemplates • CompareContractVersionsEnabled • ContractSignatureDeclinedSts • ContractDocumentDownloadOption • ContractSignatureExpiredStatus • ContractSignatureVoidedStatus • ContractSignedStatus • DefaultTemplateName • DocuSignAccountBrand • DocuSignUseAccountDefaultNtfcn • DocuSignExpiresAfter • DocuSignExpireEnabled • DocumentFileNameFormat • DocuSignExpireWarning • DocuSignReminderDelayinDays • DocuSignReminderEnabled • DocuSignReminderFrequency • DocumentTemplateFilterClass • EmailNotificationOnDocumentGeneration • ImportTargetContractStatus • InclWordTrackChgSectionContent • InclWordTrackChgReconciliation • NotifyDocTemplateVerChgStatus • PrivateExternalReviewCompletionSite • TrackContractRedlines • WordTrackChangesDisplayColor
configValue	Field Type string Description Required. Indicates the value of the configuration setting specified in the Configuration Name field.
usageType	Field Type ContractUsageType (enumeration of type string)

Field Name	Description
	Description The usage type to which this setting belongs. Possible value are: • DocumentSetting • Reconciliation • Redlining • SignatureSetting

Declarative Metadata Sample Definition

The following is an example of a ContractType component.

```
<?xml version="1.0" encoding="UTF-8"?>
<ContractType xmlns="http://soap.sforce.com/2006/04/metadata">
  <masterLabel>New_ContractType</masterLabel>
  <isDefault>true</isDefault>
  <subTypes>RecordTypeName1</subTypes>
</ContractType>
```

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>ContractType</name>
  </types>
  <types>
    <members>Contract.RecordTypeName1</members>
    <name>RecordType</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.

ESignatureConfig

Represents the settings for integrating with external eSignature providers.



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

ESignatureConfig components have the suffix `.eSignatureConfig` and are stored in the `eSignatureConfigs` folder.

Version

ESignatureConfig components are available in API version 54.0 and later.

Special Access Rules

Fields

Field Name	Description
<code>configType</code>	Field Type ConfigType (enumeration of type string) Description Required. Indicates the configured setting. Possible values are: • <code>AnchorString</code> • <code>CalloutTimeout</code> • <code>EnvelopesLastPollDate</code> • <code>SignerRoles</code> • <code>SyncFileSizeLimit</code>
<code>configValue</code>	Field Type string Description Required. Indicates the value of the configured setting.
<code>description</code>	Field Type string Description The description for the configuration setting.
<code>groupType</code>	Field Type ConfigGroup (enumeration of type string)

Field Name	Description
	Description The description for the configuration setting. Possible values are: • AnchorTabSetting • CalloutConfigurationSetup • Envelope • EnvelopeObjectLimits
masterLabel	Field Type string Description Required. Indicates the name of the setting.
vendor	Field Type Vendor (enumeration of type string) Description Required. The provider type to which the configuration setting belongs. Currently only DocuSign is supported.

Declarative Metadata Sample Definition

The following is an example of an ESignatureConfig component.

```
<?xml version="1.0" encoding="UTF-8"?>
<ESignatureConfig xmlns="http://soap.sforce.com/2006/04/metadata">
  <configType>AnchorString</configType>
  <groupType>AnchorTabSetting</groupType>
  <configValue>12345</configValue>
  <masterLabel>DocuSignAnchorString</masterLabel>
  <vendor>DocuSign</vendor>
  <description>testdescription</description>
</ESignatureConfig>
```

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>ESignatureConfig</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](#).

ESignatureEnvelopeConfig

Represents the notification-specific settings for integrating with external eSignature providers.



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

ESignatureEnvelopeConfig components have the suffix `.eSignatureEnvelopeConfig` and are stored in the `eSignatureEnvelopeConfigs` folder.

Version

ESignatureEnvelopeConfig components are available in API version 54.0 and later.

Special Access Rules

Fields

Field Name	Description
<code>expirationPeriod</code>	Field Type integer Description The expiration period for signing.
<code>expirationWarningPeriod</code>	Field Type integer Description The number of days before expiration for warning notifications.
<code>firstReminderPeriod</code>	Field Type integer Description The number of days between envelope delivery and the first reminder email.

Field Name	Description
isExpirationEnabled	Field Type boolean Description Indicates whether expiration is enabled.
isReminderEnabled	Field Type boolean Description Indicates whether reminders are enabled.
isVendorDefaultNtfcnEnabled	Field Type boolean Description Indicates whether the envelope uses account default notification settings.
masterLabel	Field Type string Description Required. The name of the setting.
reminderIntervalPeriod	Field Type integer Description The interval in days between reminder emails.
targetObjectName	Field Type string Description Required. The object to which the eSignature applies, such as an Opportunity, Quote, or Order.
vendor	Field Type Vendor (enumeration of type string) Description Required. The provider type to which the configuration setting belongs. Currently only DocuSign is supported.
vendorAccountIdentifier	Field Type string

Field Name	Description
	Description The eSignature branding identifier.

Declarative Metadata Sample Definition

The following is an example of an ESignatureEnvelopeConfig component.

```
<?xml version="1.0" encoding="UTF-8"?>
<ESignatureEnvelopeConfig xmlns="http://soap.sforce.com/2021/10/metadata">
  <masterLabel>DocuSign_Contract</masterLabel>
  <targetObjectName>Contract</targetObjectName>
  <vendorAccountIdentifier>vai</vendorAccountIdentifier>
  <isExpirationEnabled>true</isExpirationEnabled>
  <expirationPeriod>2</expirationPeriod>
  <expirationWarningPeriod>2</expirationWarningPeriod>
  <isReminderEnabled>true</isReminderEnabled>
  <firstReminderPeriod>2</firstReminderPeriod>
  <reminderIntervalPeriod>2</reminderIntervalPeriod>
  <isVendorDefaultNtfcnEnabled>true</isVendorDefaultNtfcnEnabled>
  <vendor>DocuSign</vendor>
</ESignatureEnvelopeConfig>
```

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/2021/10/metadata">
  <types>
    <members>*</members>
    <name>ESignatureEnvelopeConfig</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](#).

ExternalDocStorageConfig

Represents configuration, which admin makes in setup to specify the drive, path, and named credential to be used for storing documents on external drives.



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 Metadata metadata type and inherits `fullName` field.

File Suffix and Directory Location

ExternalDocStorageConfig components have the suffix `.externalDocStorageConfig` and are stored in the `externalDocStorageConfigs` folder.

Version

ExternalDocStorageConfig components are available in API version 57.0 and later.

Fields

Field Name	Description
<code>documentPath</code>	Field Type string Description Required. The path from the root in the external storage where documents are stored.
<code>externalDocStorageIdentifier</code>	Field Type string Description Required. The ID of the external document storage.
<code>masterLabel</code>	Field Type string Description Required. A user-friendly name for ExternalDocStorageConfig, which is defined when the ExternalDocStorageConfig is created.
<code>namedCredential</code>	Field Type string Description Required. The Named Credential associated with the External Document Storage Configuration. A named credential can be specified as an endpoint to simplify the setup of authenticated call outs.
<code>recordType</code>	Field Type string Description The record type associated with the Reference object.

Field Name	Description
storageDriveType	Field Type StorageDriveType (enumeration of type string) Description Required. The external document storage drive. Possible value is: • MicrosoftOneDrive
targetObject	Field Type TargetObject (enumeration of type string) Description The target object associated with the external document storage. Possible values are: • All • Contract • DocumentTemplate • Disclosure • InfoLibraryExternalDocument

Declarative Metadata Sample Definition

The following is an example of a ExternalDocStorageConfig component.

```
<?xml version="1.0" encoding="UTF-8"?>
<ExternalDocStorageConfig
  xmlns="http://soap.sforce.com/2006/04/metadata">
  <documentPath>/Salesforce/Contracts/</documentPath>
  <externalDocStorageIdentifier>ExternalDocIdTest1234</externalDocStorageIdentifier>
  <masterLabel>Contract_Contract_Lifecycle_Management</masterLabel>
  <namedCredential>Salesforce</namedCredential>
  <recordType>ContractLifecycleManagement</recordType>
  <storageDriveType>MicrosoftOneDrive</storageDriveType>
  <targetObject>Contract</targetObject>
</ExternalDocStorageConfig>
```

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>ExternalDocStorageConfigObjectPackage</fullName>
  <types>
    <members>Contract_Contract_Lifecycle_Management</members>
```

```
<name>ExternalDocStorageConfig</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](#).