
Referral Marketing Developer Guide

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CHAPTER 1 Introduction to Referral Marketing

Referral Marketing enables marketing managers to create and manage referral programs for the company's customers and their referrals. Developers in your company can use the resources provided in this guide to customize and extend the capabilities of Referral Marketing.

CHAPTER 2 Standard Objects

In this chapter ...

- [Objects for B2B and B2C Referral Programs](#)
- [CommunicationChannelTemplate](#)
- [CommunicationChannelType](#)
- [ExtendedReward](#)
- [ExtendedRewardDefinition](#)
- [InternalOrgUnitCommChannel](#)
- [JournalSubType](#)
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- [PromotionStageTemplate](#)
- [PromotionTemplate](#)
- [PromTempExtalRewardDef](#)
- [Referral](#)
- [TransactionJournal](#)
- [Voucher](#)
- [VoucherDefinition](#)

The Referral Marketing and B2B Referral Management data models come with a set of objects and fields to manage referral program information such as program design, advocate and referral details, and rewards. Developers can extend the objects in the data model based on your company's requirements.

SEE ALSO:

[Object Reference for the Salesforce Platform](#)

Objects for B2B and B2C Referral Programs

Objects form the data model foundation for managing referral program information. Discover which objects are available for B2B and B2C referral programs.

The objects available in your org vary depending on whether you're creating B2B or B2C referral programs.

Object	Available in B2B	Available in B2C
CommunicationChannelTemplate	No	Yes
CommunicationChannelType	No	Yes
ExtendedReward	Yes	Yes
ExtendedRewardDefinition	Yes	Yes
InternalOrgUnitCommChannel	No	Yes
JournalSubType	Yes	Yes
JournalType	Yes	Yes
LoyaltyPgmEngmtAttribute	Yes	Yes
LoyaltyPgmMbrAttributeVal	Yes	Yes
LoyaltyProgram	Yes	Yes
LoyaltyProgramMbrPromotion	Yes	Yes
LoyaltyProgramMember	Yes	Yes
LoyaltyProgramProcess	Yes	Yes
LoyaltyProgramProcessRule	Yes	Yes
LoyaltyProgramWidget	No	Yes
Promotion	Yes	Yes
PromotionMarketSegment	No	Yes
PromotionStage	Yes	Yes
PromotionStageEmailTemplate	No	Yes
PromotionStageTemplate	Yes	Yes
PromotionTemplate	Yes	Yes
PromStageCommChannelTpl	No	Yes
PromTplExtdRewardDef	Yes	Yes
Referral	Yes	Yes
TransactionJournal	Yes	Yes
Voucher	Yes	Yes

Object	Available in B2B	Available in B2C
VoucherDefinition	Yes	Yes

CommunicationChannelTemplate

Represents the template for different communication channels. This object is available in API version 63.0 and later. This object is available only for B2C referral programs.

Supported Calls

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

Fields

Field	Details
CommunicationChannelTypeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Specifies the ID of communication channel type. This field is a relationship field.</p> <p>Relationship Name CommunicationChannelType</p> <p>Refers To CommunicationChannelType</p>
ContentIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The unique identifier of the content that is used in a service, such as a Marketing Cloud service.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description</p> <p>Indicates whether the template is active (true) or not (false).</p> <p>The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type</p> <p>dateTime</p> <p>Properties</p> <p>Filter, Nillable, Sort</p> <p>Description</p> <p>The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type</p> <p>dateTime</p> <p>Properties</p> <p>Filter, Nillable, Sort</p> <p>Description</p> <p>The timestamp when the current user last viewed this record or list view.</p> <p>If this value is null, and <parname>LastReferenceDate</parname> is not null, the user accessed this record or list view indirectly.</p>
Name	<p>Type</p> <p>string</p> <p>Properties</p> <p>Create, Filter, Group, idLookup, Sort, Update</p> <p>Description</p> <p>The name of the communication channel template.</p>
OwnerId	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description</p> <p>ID of the owner of the communication channel template.</p> <p>This field is a polymorphic relationship field.</p> <p>Relationship Name</p> <p>Owner</p> <p>Refers To</p> <p>Group, User</p>

Field	Details
TemplateContent	Type textarea Properties Create, Update Description The content of the communication channel template.

CommunicationChannelType

Represents the type of communication channel such as WhatsApp, SMS, or Telegram. This object is available in API version 63.0 and later. This object is available only for B2C referral programs.

Supported Calls

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

Fields

Field	Details
ChannelName	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the channel.
DeveloperName	Type string Properties Create, Filter, Group, Sort, Update Description Required. The unique name of the communication channel. The name: <ul style="list-style-type: none">• must be 40 characters or fewer• must begin with a letter• can contain only underscores and alphanumeric characters• can't include spaces• can't end with an underscore

Field	Details
	<ul style="list-style-type: none"> can't contain 2 consecutive underscores <p>In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization.</p>
Language	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The combined language and locale ISO code, which controls the language of the communication channel.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> 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	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Label for this communication channel value. This display value is the internal label that doesn't get translated.</p>

ExtendedReward

Represents the instance of an extended reward that's issued to a customer, a partner, or a member. This object is available in API version 64.0 and later.

Supported Calls

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

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the account to which the reward is issued. This field is a relationship field.</p> <p>Relationship Name Account</p> <p>Refers To Account</p>
AdditionalNotes	<p>Type string</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The reason why the reward was issued.</p>
ContactId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the contact associated with the member. This field is a relationship field.</p> <p>Relationship Name Contact</p>

Field	Details
	Refers To Contact
EffectiveDateTime	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The date and time from when the reward is available for redemption.
ExpirationDateTime	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The date and time when the reward expires and is no longer available for redemption.
ExtendedRewardDefinitionId	Type reference Properties Create, Filter, Group, Sort Description The ID of the reward definition associated with the reward. This field is a relationship field. Relationship Name ExtendedRewardDefinition Refers To ExtendedRewardDefinition
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The most recent date on which a user referenced this record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort

Field	Details
	Description The most recent date on which a user viewed this record.
LoyaltyProgramMemberId	Type reference Properties Create, Filter, Group, Nillable, Sort Description The ID of the loyalty program member who has been issued the reward. This field is a relationship field. Relationship Name LoyaltyProgramMember Refers To LoyaltyProgramMember
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the reward.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description ID of the owner of the extended reward. This field is a polymorphic relationship field. Relationship Name Owner Refers To Group, User
PromotionId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The ID of the promotion to which the reward is issued. This field is a relationship field.

Field	Details
	Relationship Name Promotion Refers To Promotion
ReferralId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The ID of referral record created during the rewarding stage. This field is a relationship field. Relationship Name Referral Refers To Referral
RewardRecipientId	Type reference Properties Create, Filter, Group, Sort, Update Description The ID of the recipient of the reward. This field is a polymorphic relationship field. Relationship Name RewardRecipient Refers To Account, Contact, LoyaltyProgramMember
Status	Type picklist Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update Description Status the reward is in. Possible values are: <ul style="list-style-type: none"> Cancelled—Canceled Issued Pending Redeemed

Field	Details
	The default value is <code>Issued</code> .
TransactionJournalId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the transaction journal associated with the member reward. This field is a relationship field.</p> <p>Relationship Name TransactionJournal</p> <p>Refers To TransactionJournal</p>
Value	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The value of the reward.</p>

Associated Objects

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

[ExtendedRewardChangeEvent](#) on page 116

Change events are available for the object.

ExtendedRewardDefinition

Represents the definition of an extended reward that is associated with a loyalty program. This object is available in API version 64.0 and later.

Supported Calls

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

Fields

Field	Details
Description	<p>Type textarea</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Description about the reward definition.</p>
ImageUrl	<p>Type url</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The URL of the image location for the reward definition.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the reward defintion is active (true) or not (false). The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user referenced this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user viewed this record.</p>
Name	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the reward definition.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the owner of the extended reward definition. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
PartnerAccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the partner associated with the reward definition. This field is a relationship field.</p> <p>Relationship Name PartnerAccount</p> <p>Refers To Account</p>
SourceReferenceId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the loyalty program associated with the rewards. This field is a relationship field.</p> <p>Relationship Name SourceReference</p> <p>Refers To LoyaltyProgram</p>

Field	Details
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The type of the reward. Possible values are:</p> <ul style="list-style-type: none"> • BOGO • Cashback • Vacation
UnitCost	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Cost per reward indicating the liability incurred per issued reward.</p>

Associated Objects

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

[ExtendedRewardDefinitionChangeEvent](#) on page 116

Change events are available for the object.

InternalOrgUnitCommChannel

Represents the communication channel for the internal organization unit. This object is available in API version 63.0 and later. This object is available only for B2C referral programs.

Supported Calls

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

Special Access Rules

Fields

Field	Details
ChannelIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The unique identifier of the communication channel.</p>
CommunicationChannelTypeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Specifies the ID of the communication channel type. This field is a relationship field.</p> <p>Relationship Name CommunicationChannelType</p> <p>Refers To CommunicationChannelType</p>
InternalOrganizationUnitId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The ID of the parent internal organization unit that's associated with the communication channel. This field is a relationship field.</p> <p>Relationship Name InternalOrganizationUnit</p> <p>Relationship Type Master-detail</p> <p>Refers To InternalOrganizationUnit (the master object)</p>
LastReferencedDate	<p>Type dateTime</p>

Field	Details
	Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view. If this value is null, and <parmname>LastReferenceDate</parmname> is not null, the user accessed this record or list view indirectly.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the internal organization unit communication channel.

JournalSubType

Represents a subcategory of transaction journals. Journal subtypes identify the type of advocate or referred party activity for which transaction journals are created. This object is available in API version 59.0 and later.

Referral Marketing provides journal subtypes that you can use to create custom processes for referral promotion based on your company's requirements.

These subtypes are provided by default for B2C referral programs:

- Advocate Enrollment—Used for transaction journals that are created when an existing customer joins as an advocate of the referral program.
- Advocate Reward—Used for transaction journals that are created to reward advocates after their referrals sign up.
- Referral Purchase—Used for transaction journals that are created when a referral completes a purchase.
- Referral Signup—Used for transaction journals that are created when a referral signs up as a new customer.
- Member Purchase—Reserved for internal use and isn't required for B2C or B2B referral programs. Don't use this journal subtype to customize or extend your implementation.

These subtypes are provided by default for B2B referral programs:

- Advocate Enrollment—Used for transaction journals that are created when an existing partner joins as an advocate of the referral program.
- Advocate Reward—Used for transaction journals that are created to reward advocates.

- Referral Lead Creation—Used for transaction journals that are created when a lead record is created for a referred party.
- Referral Qualification—Used for transaction journals that are created when a referral lead qualifies.
- Referred Party Reward—Used for transaction journals that are created to reward a referred party.

Supported Calls

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

Fields

Field	Details
Description	<p>Type textarea</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The description or the use of the journal subtype.</p>
JournalTypeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The ID of the journal type associated with the journal subtype. In Referral Marketing, journal subtypes are always associated with the Referral journal type. This field is a relationship field.</p> <p>Relationship Name JournalType</p> <p>Relationship Type Lookup</p> <p>Refers To JournalType</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user referenced this record.</p>

Field	Details
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user viewed this record.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the journal subtype.</p>

Associated Objects

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

[JournalSubTypeHistory](#) on page 110

History is available for tracked fields of the object.

JournalType

Represents a category of transaction journal. Journal types identify the reason for which transaction journals are created. This object is available in API version 59.0 and later.

Referral Marketing provides the following journal types by default:

- Referral—This journal type is used to identify all transaction journals that are created for your referral programs.
- Manual Points Adjustment—Reserved for internal use and isn't required for B2C or B2B referral programs. Don't use this journal type to customize or extend your implementation.
- Qualifying Points Reset—Reserved for internal use and isn't required for B2C or B2B referral programs. Don't use this journal type to customize or extend your implementation.



Tip: Transaction Journals are automatically created for referral events like referral signup, referral purchase, and member reward. The transaction journals are associated with the Referral journal type. For your custom processes, we recommend creating journal subtypes associated with the Referral journal type instead of creating journal types.

Supported Calls

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

Fields

Field	Details
Description	<p>Type textarea</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The description or the use of the journal type.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user referenced this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user viewed this record.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the journal type.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The owner ID of the journal type. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p>

Field	Details
	Refers To Group, User
ProcessType	Type picklist Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update Description Required. The type of business process for which you want to use the journal type. For business processes related to Referral Marketing, enter Referral. Possible values are: <ul style="list-style-type: none"> • Loyalty • Referral The default value is Loyalty.

Associated Objects

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

[JournalTypeHistory](#) on page 110

History is available for tracked fields of the object.

[JournalTypeOwnerSharingRule](#) on page 112

Sharing rules are available for the object.

[JournalTypeShare](#) on page 114

Sharing is available for the object.

LoyaltyPgmEngmtAttribute

Represents an event that's tracked for advocates. For example, engagement attributes are used to track the number of times advocates have referred their friends or businesses in a day and the number of times advocates have been rewarded for successful referrals. This object is available in API version 59.0 and later.

You can create engagement attributes to track long-term advocate and referral events based on your company's requirements.

Supported Calls

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

Fields

Field	Details
DefaultValue	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort</p> <p>Description The default value of the engagement attribute. In the LoyaltyPgmMbrAttributeVal record that tracks an advocate's progress towards the associated engagement attribute's target, the current value is defaulted to the associated engagement attribute's default value.</p>
Description	<p>Type textarea</p> <p>Properties Create, Filter, Group, Nillable, Sort</p> <p>Description The description of the engagement attribute.</p>
EndDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort</p> <p>Description The date until which the engagement attribute is tracked for advocates.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user referenced this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user viewed this record.</p>
LoyaltyProgramId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Sort</p> <p>Description The ID of the referral program associated with the engagement attribute. This field is a relationship field.</p> <p>Relationship Name LoyaltyProgram</p> <p>Relationship Type Lookup</p> <p>Refers To LoyaltyProgram</p>
MaximumResetCountPerPeriod	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort</p> <p>Description The maximum number of times the current value for the engagement attribute can be reset during a period. The advocate's current value is reset when they achieve the target value.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort</p> <p>Description The name of the engagement attribute.</p>
ResetValueOn	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort</p> <p>Description The day on which the advocate's current value in the LoyaltyPgmMbrAttributeVal record that tracks the advocate's engagement attribute progress is reset to zero. If the reset frequency is Weekly, specify the day of the week when the current value is reset. To reset the current value on a Sunday, enter 1. To reset the current value on a Saturday, enter 7. If the reset frequency is Monthly, enter a value from 1 through 31. To reset the current value on the 15th of a month, enter 15. If the reset frequency is Yearly, enter a value from 1 through 12. To reset the current value on the first day of April month, enter 4. If the reset frequency is custom, enter the number of days after which the current value is reset.</p>

Field	Details
ShouldOverwriteAttrCurrVal	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates whether a single LoyaltyPgmMbrAttributeVal record is required to track the advocate's engagement across periods (<code>true</code>) or not (<code>false</code>). If you specify false, unique records are created to track advocate's engagement for each period individually, and ensures that you have the historical data for each period. The default value is <code>false</code>.</p>
StartDate	<p>Type date</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Required. The date from when the engagement attribute is tracked for advocates.</p>
Status	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort</p> <p>Description Required. The status of the engagement attribute. Create a record in the Draft status. After you've created the record, you can move it to the Active or Inactive status. Possible values are:</p> <ul style="list-style-type: none"> • Active • Draft • Inactive <p>The default value is <code>Draft</code>.</p>
TargetValue	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort</p> <p>Description The target value that advocates have to achieve to be eligible for a reward or complete the engagement attribute's target.</p>

Field	Details
ValueResetFrequency	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Specify the frequency at which the advocate's current value in the LoyaltyPgmMbrAttributeVal record that tracks the advocate's engagement attribute progress is reset to zero.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • CustomPeriod • Daily • Monthly • Weekly • Yearly

Associated Objects

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

[LoyaltyPgmEngmtAttributeHistory](#) on page 110

History is available for tracked fields of the object.

LoyaltyPgmMbrAttributeVal

Represents an advocate's progress towards to target of an engagement attribute. This object is available in API version 49.0 and later.

When you assign an engagement attribute to an advocate, you can create and update LoyaltyPgmMbrAttributeVal records to update the advocate's progress towards the engagement attribute target.

Supported Calls

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

Fields

Field	Details
CumulativeValue	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort</p>

Field	Details
	Description The cumulative value achieved by the advocate for the related engagement attribute until date across all the periods.
CurrentValue	Type string Properties Create, Filter, Group, Nillable, Sort Description The value achieved by the advocate for the related engagement attribute during a specific period.
EndDate	Type date Properties Create, Filter, Group, Nillable, Sort Description The end date of the period for which the advocate's progress towards achieving the related engagement attribute target is tracked.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The most recent date on which a user referenced this record.
LastResetDate	Type date Properties Create, Filter, Group, Nillable, Sort Description The date on which the current value was last reset during a specific period.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The most recent date on which a user viewed this record.

Field	Details
LoyaltyPgmEngmtAttributeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Required. The associated engagement attribute for which the advocate's progress is tracked. This field is a relationship field.</p> <p>Relationship Name LoyaltyPgmEngmtAttribute</p> <p>Relationship Type Lookup</p> <p>Refers To LoyaltyPgmEngmtAttribute</p>
LoyaltyProgramMemberId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The associated advocate for whom engagement attribute progress is tracked. This field is a relationship field.</p> <p>Relationship Name LoyaltyProgramMember</p> <p>Relationship Type Lookup</p> <p>Refers To LoyaltyProgramMember</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The unique number of the engagement attribute value.</p>
ResetCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort</p> <p>Description The number of times the current value has been reset during a specific period.</p>

Field	Details
StartDate	<p>Type date</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Required. The start date of the period for which the advocate's progress towards achieving the related engagement attribute target is tracked.</p>

Associated Objects

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

[LoyaltyPgmMbrAttributeValHistory](#) on page 110

History is available for tracked fields of the object.

LoyaltyProgram

Represents the referral program. All records related to the referral program's promotions, rewards, advocates, and referrals are associated with the referral program. This object is available in API version 59.0 and later.

Supported Calls

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

Fields

Field	Details
Description	<p>Type string</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The description or the business value of the referral program.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	Description The most recent date on which a user referenced this record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The most recent date on which a user viewed this record.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the referral program.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The owner of the referral program. 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 Required. Specifies the status of the referral program. Possible values are: <ul style="list-style-type: none"> Active Inactive

Field	Details
	The default value is <code>Active</code> .
SubType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Required. Specifies the type of referral program.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> For B2B referral programs: <code>B2B — Business to Business</code> For B2C referral programs: <code>B2C — Business to Customer</code>
Type	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Required. Specifies the type of program.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <code>REFERRAL_PROGRAM</code> <code>LOYALTY_PROGRAM</code>—Reserved for internal use and isn't required for B2C or B2B referral programs. Don't use this value to customize or extend your implementation.

Associated Objects

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

[LoyaltyProgramFeed](#) on page 103

Feed tracking is available for the object.

[LoyaltyProgramHistory](#) on page 110

History is available for tracked fields of the object.

[LoyaltyProgramOwnerSharingRule](#) on page 112

Sharing rules are available for the object.

[LoyaltyProgramShare](#) on page 114

Sharing is available for the object.

LoyaltyProgramMbrPromotion

Represents a junction between an advocate and a promotion and is used to track whether an advocate has signed up for a promotion. This object is available in API version 49.0 and later.

Supported Calls

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

Fields

Field	Details
CumulativeUsageCompletePercent	<p>Type percent</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Reserved for internal use and isn't required for B2C or B2B referral programs. Don't use this field to customize or extend your implementation.</p>
CumulativeUsageCompleted	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Reserved for internal use and isn't required for B2C or B2B referral programs. Don't use this field to customize or extend your implementation.</p>
CumulativeUsageTarget	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Reserved for internal use and isn't required for B2C or B2B referral programs. Don't use this field to customize or extend your implementation.</p>
IsEnrollmentActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Reserved for internal use and isn't required for B2C or B2B referral programs. Don't use this field to customize or extend your implementation. The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p>

Field	Details
	Properties Filter, Nillable, Sort Description The most recent date on which a user referenced this record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The most recent date on which a user referenced this record.
LoyaltyProgramMemberId	Type reference Properties Create, Filter, Group, Sort Description The advocate who has signed up for the related promotion. This field is a relationship field. Relationship Name LoyaltyProgramMember Relationship Type Lookup Refers To LoyaltyProgramMember
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description The unique number of the loyalty program member promotion.
PromotionId	Type reference Properties Create, Filter, Group, Nillable, Sort Description The ID of the promotion that the related advocate has signed up for. This field is a relationship field.

Field	Details
	Relationship Name Promotion
	Relationship Type Lookup
	Refers To Promotion

Associated Objects

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

[LoyaltyProgramMbrPromotionHistory](#) on page 110

History is available for tracked fields of the object.

LoyaltyProgramMember

Represents the details of a referral program advocate. This object is available in API version 59.0 and later.

In a B2C referral program, existing customers can sign up as advocates of the referral program and refer their friends to the company. In a B2C referral program, existing partners can sign up as advocates of the referral program and refer businesses to the company.

Supported Calls

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

Fields

Field	Details
AccountId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The ID of Business Account record for the B2B referral program's advocate. Specify the advocate's AccountId only when the advocate's membership type is Corporate. This field is a relationship field.
	Relationship Name Account

Field	Details
	Relationship Type Lookup
	Refers To Account
CanReceivePartnerPromotions	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Reserved for internal use and isn't required for B2C or B2B referral programs. Don't use this field to customize or extend your implementation. The default value is <code>false</code> .
CanReceivePromotions	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether the advocate wants to receive marketing communication about referral promotions (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code> .
ContactId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The ID of Contact record for the B2C referral program's advocate. Specify the advocate's ContactId only when the advocate's membership type is Individual. This field is a relationship field.
	Relationship Name Contact
	Relationship Type Lookup
	Refers To Contact
EnrollmentChannel	Type picklist

Field	Details
	<p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The channel that was used by the customer to enroll as an advocate of the referral program.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • CallCenter—Call Center • Email • Franchise • Mobile • POS • Partner • Print • Social • Store • Web <p>The default value is POS.</p>
EnrollmentDate	<p>Type date</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. The date on which the advocate enrolled in the referral program.</p>
IsEligibleForTierAssessment	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Reserved for internal use and isn't required for B2C or B2B referral programs. Don't use this field to customize or extend your implementation.</p> <p>The default value is false.</p>
LastActivityDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Reserved for internal use and isn't required for B2C or B2B referral programs. Don't use this field to customize or extend your implementation.</p>

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user referenced this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user referenced this record.</p>
MemberStatus	<p>Type picklist</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. Specifies the status of the advocate in the referral program. Possible values are:</p> <ul style="list-style-type: none"> • Active • Inactive • Merged—Reserved for internal use and isn't required for B2C or B2B referral programs. Don't use this value to customize or extend your implementation.
MemberType	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort</p> <p>Description Required. Specifies the advocate's membership type. Possible values are:</p> <ul style="list-style-type: none"> • Corporate—Specify when an organization is enrolling in the referral program. • Individual—Specify when a person is enrolling in the referral program. <p>The default value is Individual.</p>
MembershipEndDate	<p>Type date</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date on which the advocate's referral program membership ends.</p>
MembershipLastRenewalDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date on which the advocate renewed their referral program membership.</p>
MembershipNumber	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The unique referral program membership number of the advocate.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The owner of the record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
ProgramId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort</p> <p>Description The ID of the referral program that the advocate belongs to. This field is a relationship field.</p>

Field	Details
	<p>Relationship Name Program</p> <p>Relationship Type Lookup</p> <p>Refers To LoyaltyProgram</p>
ReferralCode	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The referral code of the advocate. If you don't specify a referral code, a code is automatically generated for the member.</p>
ReferredById	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The Loyalty Program Member ID of the person or organization who has referred the advocate to join the referral program. This field is a relationship field.</p> <p>Relationship Name ReferredBy</p> <p>Relationship Type Lookup</p> <p>Refers To LoyaltyProgramMember</p>
RelatedCorporateMembershipId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the Corporate type Loyalty Program Member record that belongs to the organization that the advocate belongs to. This field is a relationship field.</p> <p>Relationship Name RelatedCorporateMembership</p>

Field	Details
	Relationship Type Lookup Refers To LoyaltyProgramMember
StatementFrequency	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the frequency at which the advocate's referral statement must be generated. Possible values are: <ul style="list-style-type: none"> Monthly Quarterly The default value is Monthly.
StatementLastGeneratedDate	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The date on which the advocate's referral statement was last generated.
StatementMethod	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the methods that must be used to share the advocate's referral statement with the advocate. Possible values are: <ul style="list-style-type: none"> Email Mail The default value is Mail.

Associated Objects

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

LoyaltyProgramMemberHistory on page 110

History is available for tracked fields of the object.

LoyaltyProgramMemberOwnerSharingRule on page 112

Sharing rules are available for the object.

LoyaltyProgramMemberShare on page 114

Sharing is available for the object.

LoyaltyProgramProcess

Represents information about a process that processes transaction journals for a referral promotion's advocates and their referred party's referral events. This object is available in API version 59.0 and later.

When a marketing manager activates a referral promotion, two processes are automatically created for the promotion. One process is used to process transaction journals of the subtype Referral Signup and the process rewards referrals when they sign up. The second process is used to process transaction journals of the subtype Advocate Reward and the process rewards advocates after their referrals complete their first purchase. Both processes aren't for the marketing manager to view or edit.

Supported Calls

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

Fields

Field	Details
Description	Type textarea Properties Create, Filter, Nillable, Sort, Update Description The description or the business scenario of the process.
ExecutionType	Type picklist Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort Description Required. Specifies the mode in which you want transaction journals to be processed by the process. Possible values are: <ul style="list-style-type: none"> Batch BatchAndRealTime RealTime

Field	Details
	The default value is RealTime.
JournalSubTypeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort</p> <p>Description The ID of the journal subtype associated with the process. The process only processes transaction journals whose journal subtype is the same as the process. This field is a relationship field.</p> <p>Relationship Name JournalSubType</p> <p>Relationship Type Lookup</p> <p>Refers To JournalSubType</p>
JournalTypeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort</p> <p>Description The ID of the journal type associated with the process. The process only processes transaction journals whose journal type is the same as the process. For Referral Marketing, transaction journals are always associated with the Referral journal type. This field is a relationship field.</p> <p>Relationship Name JournalType</p> <p>Relationship Type Lookup</p> <p>Refers To JournalType</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user referenced this record.</p>

Field	Details
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user viewed this record.</p>
LoyaltyProgramId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Required. The ID of the referral program that the journal type belongs to. This field is a relationship field.</p> <p>Relationship Name LoyaltyProgram</p> <p>Relationship Type Lookup</p> <p>Refers To LoyaltyProgram</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the journal type.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The owner of the record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>

Field	Details
ProcessType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort</p> <p>Description Required. The type of process. For Referral Marketing, the process type is always TransactionJournal. Possible values are:</p> <ul style="list-style-type: none"> • CancelVoucher—Reserved for internal use and isn't required for B2C or B2B referral programs. Don't use this value to customize or extend your implementation. • CreditPointsToMembers—Reserved for internal use and isn't required for B2C or B2B referral programs. Don't use this value to customize or extend your implementation. • DebitPointsFromMembers—Reserved for internal use and isn't required for B2C or B2B referral programs. Don't use this value to customize or extend your implementation. • EnrollInPromotion—Reserved for internal use and isn't required for B2C or B2B referral programs. Don't use this value to customize or extend your implementation. • GetMemberPromotions—Reserved for internal use and isn't required for B2C or B2B referral programs. Don't use this value to customize or extend your implementation. • IssueVoucher—Reserved for internal use. • OptOutPromotion—Reserved for internal use and isn't required for B2C or B2B referral programs. Don't use this value to customize or extend your implementation. • TierProcessing—Reserved for internal use and isn't required for B2C or B2B referral programs. Don't use this value to customize or extend your implementation. • TransactionJournal • UnenrollMember—Reserved for internal use and isn't required for B2C or B2B referral programs. Don't use this value to customize or extend your implementation. • UpdateMemberDetails—Reserved for internal use and isn't required for B2C or B2B referral programs. Don't use this value to customize or extend your implementation.
Status	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Required. The status of the process. Possible values are:</p> <ul style="list-style-type: none"> • Active • Draft • Inactive <p>The default value is Draft.</p>

Associated Objects

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

[LoyaltyProgramProcessHistory](#) on page 110

History is available for tracked fields of the object.

[LoyaltyProgramProcessOwnerSharingRule](#) on page 112

Sharing rules are available for the object.

[LoyaltyProgramProcessShare](#) on page 114

Sharing is available for the object.

LoyaltyProgramProcessRule

Represents the details of a rule in a loyalty program process. This object is available in API version 59.0 and later.

Supported Calls

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

Fields

Field	Details
<code>IsProcessEligibilityRule</code>	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates whether the rule is used to decide transaction journals' eligibility for a process (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
<code>LastReferencedDate</code>	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user referenced this record.</p>
<code>LastViewedDate</code>	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	Description The most recent date on which a user viewed this record.
LoyaltyProgramProcessId	Type reference Properties Filter, Group, Sort Description The ID of the loyalty program process that the rule is a part of. This field is a relationship field. Relationship Name LoyaltyProgramProcess Relationship Type Lookup Refers To LoyaltyProgramProcess
Name	Type string Properties Filter, Group, idLookup, Sort Description The name of the rule.
PromotionId	Type reference Properties Filter, Group, Nillable, Sort Description The ID of the promotion associated with the rule. This field is a relationship field. Relationship Name Promotion Relationship Type Lookup Refers To Promotion
Status	Type picklist

Field	Details
	Properties Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort
	Description The status of the rule. Possible values are: <ul style="list-style-type: none"> • Active • Draft • Inactive The default value is Draft.

Associated Objects

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

LoyaltyProgramProcessRuleHistory on page 110

History is available for tracked fields of the object.

LoyaltyProgramWidget

Represents information about a widget that advocates use to enroll in the referral program and refer their friends This object is available in API version 59.0 and later. This object is available only for B2C referral programs.

Supported Calls

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

Fields

Field	Details
CustomizedContent	Type textarea
	Properties Create, Nillable, Update
	Description The details of a widget's customizations.
Description	Type string

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update Description The description or the business use case of the widget.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The most recent date on which a user referenced this record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The most recent date on which a user viewed this record.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the widget.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The owner of the record. This field is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User

Field	Details
ProgramId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Required. The ID of the referral program that the widget belongs to. This field is a relationship field.</p> <p>Relationship Name Program</p> <p>Relationship Type Lookup</p> <p>Refers To LoyaltyProgram</p>
PromotionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the promotion that the widget belongs to. This field is a relationship field.</p> <p>Relationship Name Promotion</p> <p>Relationship Type Lookup</p> <p>Refers To Promotion</p>
PromotionStageId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the promotion stage that the widget represents. The widget that marketing managers design when creating a referral promotion is associated with the Promotion Launched stage. This field is a relationship field.</p> <p>Relationship Name PromotionStage</p> <p>Relationship Type Lookup</p>

Field	Details
	Refers To PromotionStage
TemplateName	Type string Properties Create, Filter, Group, Sort Description Required. The name of the widget template used to create the widget.
TemplateVersion	Type int Properties Create, Filter, Group, Sort Description Required. The version of the widget template used to create the widget.

Associated Objects

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

[LoyaltyProgramWidgetShare](#) on page 114

Sharing is available for the object.

Promotion

Represents information about a referral promotion. This object is available in API version 59.0 and later.

Supported Calls

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

Fields

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

Field	Details
	<p>Description The ID of the internal organization unit that contains the details of the Marketing Cloud business unit associated with the promotion for a B2C referral programs. This field is a relationship field.</p> <p>Relationship Name BusinessUnit</p> <p>Relationship Type Lookup</p> <p>Refers To InternalOrganizationUnit</p>
CampaignId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the campaign whose members are the promotion's target audience. This field is a relationship field.</p> <p>Relationship Name Campaign</p> <p>Relationship Type Lookup</p> <p>Refers To Campaign</p>
CumulativeUsageTarget	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Reserved for internal use and isn't required for B2C or B2B referral programs. Don't use this field to customize or extend your implementation.</p>
CurrentLiabilityAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The liability that's incurred by the company for the promotion till date.</p>

Field	Details
CurrentPointCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Reserved for internal use and isn't required for B2C or B2B referral programs. Don't use this field to customize or extend your implementation.</p>
DefaultVoucherDefinitionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Reserved for internal use and isn't required for B2C or B2B referral programs. Don't use this field to customize or extend your implementation. This field is a relationship field.</p> <p>Relationship Name DefaultVoucherDefinition</p> <p>Relationship Type Lookup</p> <p>Refers To VoucherDefinition</p>
Description	<p>Type textarea</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The description of the promotion.</p>
EndDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date until which the referral promotion is run by the company.</p>
EnrollmentEndDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	Description The date until which advocates can join the referral promotion.
EnrollmentStartDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date from which advocates can join the referral promotion.
FulfillmentAction	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Reserved for internal use and isn't required for B2C or B2B referral programs. Don't use this field to customize or extend your implementation. Possible values are: <ul style="list-style-type: none"> CreditPoints IssueVoucher
ImageUrl	Type url Properties Create, Filter, Nillable, Sort, Update Description The URL of the file that contains the marketing image of the promotion.
IsActive	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether a promotion is active (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code> .
IsCloned	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	<p>Description</p> <p>Reserved for internal use and isn't required for B2C or B2B referral programs. Don't use this field to customize or extend your implementation.</p>
IsEnrollmentRequired	<p>Type</p> <p>boolean</p> <p>Properties</p> <p>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description</p> <p>Indicates whether advocates need to join the promotion before they can refer (<code>true</code>) or not (<code>false</code>).</p> <p>The default value is <code>false</code>.</p>
IsPointsWithFactor	<p>Type</p> <p>boolean</p> <p>Properties</p> <p>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description</p> <p>Reserved for internal use and isn't required for B2C or B2B referral programs. Don't use this field to customize or extend your implementation.</p> <p>The default value is <code>false</code>.</p>
IsQuickPromotion	<p>Type</p> <p>boolean</p> <p>Properties</p> <p>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description</p> <p>Reserved for internal use and isn't required for B2C or B2B referral programs. Don't use this field to customize or extend your implementation.</p> <p>The default value is <code>false</code>.</p>
IsReferralPromotion	<p>Type</p> <p>boolean</p> <p>Properties</p> <p>Create, Defaulted on create, Filter, Group, Sort</p> <p>Description</p> <p>Indicates whether the promotion is for a referral program (<code>true</code>) or not (<code>false</code>). Specify <code>true</code> for all the promotions that you create for your referral program.</p> <p>The default value is <code>false</code>.</p>

Field	Details
IssuedVoucherCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The count of vouchers that have been issued to advocates and their referred parties as promotion reward.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user referenced this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user viewed this record.</p>
LoyaltyProgramId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the referral program that the promotion is a part of. This field is a relationship field.</p> <p>Relationship Name LoyaltyProgram</p> <p>Relationship Type Lookup</p> <p>Refers To LoyaltyProgram</p>
LoyaltyPromotionType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p>

Field	Details
	<p>Description</p> <p>The referral promotion type. For referral promotions, specify the type as <code>Standard</code>.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • <code>Cumulative</code>—Reserved for internal use and isn't required for B2C or B2B referral programs. Don't use this value to customize or extend your implementation. • <code>Joint</code>—Reserved for internal use and isn't required for B2C or B2B referral programs. Don't use this value to customize or extend your implementation. • <code>Standard</code>
<code>MaximumLiabilityAmount</code>	<p>Type</p> <p>currency</p> <p>Properties</p> <p>Create, Filter, Nillable, Sort, Update</p> <p>Description</p> <p>The maximum liability that the company can incur for the promotion.</p>
<code>MaximumRewardValue</code>	<p>Type</p> <p>int</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p>Description</p> <p>Reserved for internal use and isn't required for B2C or B2B referral programs. Don't use this field to customize or extend your implementation.</p>
<code>MaximumVoucherCount</code>	<p>Type</p> <p>int</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p>Description</p> <p>The maximum number of vouchers that issued to advocates and their referred parties as promotion rewards.</p>
<code>Name</code>	<p>Type</p> <p>string</p> <p>Properties</p> <p>Create, Filter, Group, idLookup, Sort, Update</p> <p>Description</p> <p>The name of the promotion.</p>
<code>Objective</code>	<p>Type</p> <p>textarea</p>

Field	Details
	<p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The business objective of the promotion.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The owner of the record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
PointFactor	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Reserved for internal use and isn't required for B2C or B2B referral programs. Don't use this field to customize or extend your implementation.</p>
PromotionCode	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The unique code of the promotion.</p>
PromotionConfiguration	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The configuration of the promotion. The configuration stores details like the email templates of each promotion stage, the promotion audience, referral rewards, and the reward limits.</p>

Field	Details
PromotionPageUrl	<p>Type url</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The URL of the Experience Cloud or external page where advocates can sign up for the referral promotion or learn about it.</p>
PromotionTemplateId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The referral promotion template that was used to create the promotion. This field is a relationship field.</p> <p>Relationship Name PromotionTemplate</p> <p>Relationship Type Lookup</p> <p>Refers To PromotionTemplate</p>
ReferralType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the type of referral promotion. Possible value is:</p> <ul style="list-style-type: none"> • Refer Friends
RelatedReferralProgramId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The referral program that accounts for the budget of the referral promotion. This field is a relationship field.</p> <p>Relationship Name RelatedReferralProgram</p>

Field	Details
	Relationship Type Lookup Refers To LoyaltyProgram
StartDate	Type date Properties Create, Filter, Group, Sort, Update Description Required. The start date of the referral promotion.
Status	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Reserved for internal use and isn't required for B2C or B2B referral programs. Don't use this field to customize or extend your implementation. Possible values are: <ul style="list-style-type: none"> Cancelled Complete Draft InProgress
TotalRewardPoints	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description Reserved for internal use and isn't required for B2C or B2B referral programs. Don't use this field to customize or extend your implementation.
TransactionJournalType	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Reserved for internal use and isn't required for B2C or B2B referral programs. Don't use this field to customize or extend your implementation. Possible values are:

Field	Details
	<ul style="list-style-type: none"> • <code>Accrual</code> • <code>Redemption</code>
<code>UsageType</code>	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Reserved for internal use and isn't required for B2C or B2B referral programs. Don't use this field to customize or extend your implementation.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • <code>LOYALTY</code>—Loyalty • <code>MANUFACTURING</code>—Manufacturing

Associated Objects

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

[PromotionFeed](#) on page 103

Feed tracking is available for the object.

[PromotionHistory](#) on page 110

History is available for tracked fields of the object.

[PromotionOwnerSharingRule](#) on page 112

Sharing rules are available for the object.

[PromotionShare](#) on page 114

Sharing is available for the object.

PromotionMarketSegment

Represents a junction between a promotion and a Data Cloud segment. Associate a promotion with a segment when you want only the contacts associated with the segment to join as advocates of the referral promotion. This object is available in API version 59.0 and later. This object is available only for B2C referral programs.

Supported Calls

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

Special Access Rules

To associate a promotion with a Data Cloud segment, your org needs Data Cloud's Segmentation and Activation license.

Fields

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user referenced this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user viewed this record.</p>
MarketSegmentId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The ID of the Data Cloud segment associated with the referral promotions. Contacts associated with the segment are eligible to join as advocates of the associated referral promotion.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The unique number of the promotion marketing segment.</p>
PromotionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The ID of the referral promotion associated with the segment. This field is a relationship field.</p> <p>Relationship Name Promotion</p>

Field	Details
	Relationship Type Lookup
	Refers To Promotion

Associated Objects

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

PromotionMarketSegmentFeed on page 103

Feed tracking is available for the object.

PromotionMarketSegmentHistory on page 110

History is available for tracked fields of the object.

PromotionStage

Represents a stage in a referral promotion. This object is available in API version 59.0 and later.

When you create a referral promotion, five stages are created to the promotion by default.

These stages are created by default for B2C referral programs:

- Promotion Launched—During this stage, an email is sent to the referral promotion's target audience.
- Advocate Joins Promotion—During this stage, existing customers join the referral promotion as advocates.
- Advocate Refers Friend—During this stage, advocates refer their friends.
- Friend Signs Up—During this stage, referred friends sign up as new customers.
- Friend Completes First Purchase—During this stage, a referred friend completes their first purchase.

These stages are created by default for B2B referral programs:

- Promotion Launched—During this stage, the promotion launches, and its target audience can join.
- Advocate Joins Promotion—During this stage, existing partners join the referral promotion as advocates.
- Advocate Submits Referral—During this stage, advocates refer a business.
- Referral Qualifies—During this stage, the referred party qualifies as a potential business client, and Opportunity and Account records are created for the referred party.
- Referral Closure/Converts—During this stage, the opportunity created is won or closed.

Supported Calls

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

Fields

Field	Details
ApiName	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description Required. The unique name of the promotion stage.
Configuration	Type textarea Properties Create, Nillable, Update Description The configuration of the promotion stage.
Description	Type textarea Properties Create, Filter, Nillable, Sort, Update Description The description of the promotion stage.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The most recent date on which a user referenced this record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The most recent date on which a user viewed this record.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update

Field	Details
	Description The name of the promotion stage.
PromotionId	Type reference Properties Create, Filter, Group, Sort Description The ID of the referral promotion that the stage belongs to. This field is a relationship field. Relationship Name Promotion Relationship Type Lookup Refers To Promotion
ReferredPartyJournalSubTypeId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The ID of the journal subtype that represents the activity for which the referred party is rewarded during the referral promotion stage. This field is a relationship field. Relationship Name ReferredPartyJournalSubType Relationship Type Lookup Refers To JournalSubType
ReferrerJournalSubTypeId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The ID of the journal subtype that represents the activity for which the advocate is rewarded during the referral promotion stage. This field is a relationship field.

Field	Details
	Relationship Name ReferrerJournalSubType Relationship Type Lookup Refers To JournalSubType
SequenceNumber	Type int Properties Create, Filter, Group, Sort, Update Description Required. The sequence number of the stage in a referral promotion. For example, the sequence number of the Promotion Launched stage is 1.
Type	Type picklist Properties Create, Filter, Group, Restricted picklist, Sort, Update Description Required. The type of promotion stage. Each of the default Promotion Stage records are assigned its own promotion stage type. For example, Promotion Launch is the type for the Promotion Launched stage. Possible values are: <ul style="list-style-type: none"> • Advocate Joins Promotion • Advocate Refers Friend • Friend Completes First Purchase • Friend Signs Up • Promotion Launched

PromStageCommChannelTmpl

Represents a junction between promotion stage and communication channel template. This object is available in API version 63.0 and later. This object is available only for B2C referral programs.

Supported Calls

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

Fields

Field	Details
CommChannelTemplateId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The ID of the communication channel template associated with the promotion stage. This field is a relationship field.</p> <p>Relationship Name CommChannelTemplate</p> <p>Refers To CommunicationChannelTemplate</p>
InternalOrgUnitCommChannelId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the internal organization unit communication channel associated with the promotion stage. This field is a relationship field.</p> <p>Relationship Name InternalOrgUnitCommChannel</p> <p>Refers To InternalOrgUnitCommChannel</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view.</p>

Field	Details
	If this value is null, and <parmname>LastReferenceDate</parmname> is not null, the user accessed this record or list view indirectly.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description The name of the promotion stage communication channel template.
PromotionStageId	Type reference Properties Create, Filter, Group, Sort Description The ID of the parent promotion stage record. This field is a relationship field. Relationship Name PromotionStage Relationship Type Master-detail Refers To PromotionStage (the master object)

PromotionStageEmailTemplate

Represents a junction between a promotion stage and an email template. When a referral promotion is created, an email template is associated with each stage of the promotion. You can customize the email template for each stage based on your company's branding. This object is available in API version 59.0 and later. This object is available only for B2C referral programs.

Supported Calls

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

Fields

Field	Details
EmailCustomConfiguration	Type textarea

Field	Details
	<p>Properties Create, Nillable, Update</p> <p>Description The customized content of an email template.</p>
EmailTemplateId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. The ID of the email template associated with the promotion stage. This field is a relationship field.</p> <p>Relationship Name EmailTemplate</p> <p>Relationship Type Lookup</p> <p>Refers To EmailTemplate</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user referenced this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user viewed this record.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The unique number of the promotion stage email template.</p>

Field	Details
PromotionStageId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The ID of the promotion stage that the associated email template belongs to. This field is a relationship field.</p> <p>Relationship Name PromotionStage</p> <p>Relationship Type Lookup</p> <p>Refers To PromotionStage</p>

PromotionStageTemplate

Represents the reusable configuration details of a promotion stage template. This object is available in API version 61.0 and later.

A promotion template includes templates for each promotion stage. Each promotion stage template contains the details of each promotion stage.

These templates are automatically created when you create a promotion template for a B2C referral program:

- Promotion Launched—You can't change the stage name and you can't reward advocates or their referred friends.
- Advocate Joins Promotion—You can't change the stage name and you can't reward advocates or their referred friends.
- Advocate Refers Friend—You change the stage name and reward advocates or their referred friends.
- Friend Signs Up—You change the stage name and reward advocates or their referred friends.
- Friend Completes First Purchase—You change the stage name and reward advocates or their referred friends.

These templates are automatically created when you create a promotion template for a B2B referral program:

- Promotion Launched—You can't change the stage name and you can't reward advocates or their referred friends.
- Advocate Joins Promotion—You can't change the stage name and you can't reward advocates or their referred friends.
- Advocate Submits Referral—You change the stage name and reward advocates.
- Referral Qualifies—You change the stage name and reward advocates or their referred parties.
- Referral Closure/Converts—You change the stage name and reward advocates or their referred parties.

When you use a promotion template to create a promotion, the promotion stage templates related to the promotion template are automatically used to create the stages of the promotion.

Supported Calls

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

Fields

Field	Details
Description	<p>Type textarea</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The description of the referral promotion stage template.</p>
DeveloperName	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. The developer name of the referral promotion stage template.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user referenced this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user viewed this record.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the referral promotion stage template.</p>
PromotionTemplateId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p>

Field	Details
	<p>Description The ID of the referral promotion template that the referral promotion stage template is a part of. This field is a relationship field.</p> <p>Relationship Name PromotionTemplate</p> <p>Relationship Type Master-detail</p> <p>Refers To PromotionTemplate (the master object)</p>
ReferredPartyJournalSubTypeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the journal subtype that represents the activity for which referred parties are rewarded. This field is a relationship field.</p> <p>Relationship Name ReferredPartyJournalSubType</p> <p>Relationship Type Lookup</p> <p>Refers To JournalSubType</p>
ReferrerJournalSubTypeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the journal subtype that represents the activity for which advocates are rewarded. This field is a relationship field.</p> <p>Relationship Name ReferrerJournalSubType</p> <p>Relationship Type Lookup</p> <p>Refers To JournalSubType</p>

Field	Details
RewardRecipient	<p>Type multipicklist</p> <p>Properties Create, Filter, Nillable, Update</p> <p>Description Specifies the audience of the promotion stage template's reward. Specify a value only when the promotion stage template represents a promotion stage that rewards advocates, their referred friends, or both.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Advocate • Friend—For B2B referral programs friend represents referred party
SequenceNumber	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The sequence number of the referral promotion stage template in the associated referral promotion template.</p>
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the type of referral promotion stage that the referral promotion stage template belongs to.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Advocate Joins Promotion • Advocate Refers Friend • Friend Completes First Purchase • Friend Signs Up • Promotion Launched

PromotionTemplate

Represents the JSON configuration and details of a referral promotion template. This object is available in API version 61.0 and later.

You can create a promotion template and use the template to create promotions. After you create a promotion template, these PromotionStageTemplate records are automatically created and associated with the promotion template.

For B2C referral programs:

- Promotion Launched
- Advocate Joins Promotion
- Advocate Refers Friend
- Friend Signs Up
- Friend Completes First Purchase

The Refer a Friend promotion template and its related PromotionStageTemplate records are provided by default for B2C referral programs.

For B2B referral programs:

- Promotion Launched
- Advocate Joins Promotion
- Advocate Submits Referral
- Referral Qualifies
- Referral Closure/Converts

The Refer a Lead promotion template and its related PromotionStageTemplate records are provided by default for B2B referral programs.

Supported Calls

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

Fields

Field	Details
Description	Type textarea Properties Create, Filter, Nillable, Sort, Update Description The description of the referral promotion template.
DeveloperName	Type string Properties Create, Filter, Group, Sort, Update Description Required. The developer name of the referral promotion template.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort

Field	Details
	Description The most recent date on which a user referenced this record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The most recent date on which a user viewed this record.
LoyaltyProgramId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The ID of the referral program that the referral promotion template is a part of. This field is a relationship field. Relationship Name LoyaltyProgram Relationship Type Lookup Refers To LoyaltyProgram
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the referral promotion template.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The owner of the record. This field is a polymorphic relationship field. Relationship Name Owner

Field	Details
	Relationship Type Lookup Refers To Group, User
Status	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the status of the referral promotion template. Possible values are: <ul style="list-style-type: none"> Active Draft Inactive The default value is Draft.
TemplateCategory	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the type of referral promotion template. Possible values are: <ul style="list-style-type: none"> Loyalty—Reserved for internal use and isn't required for B2C or B2B referral programs. Don't use this value to customize or extend your implementation. Referral The default value is Referral.
TemplateVersion	Type int Properties Create, Filter, Group, Nillable, Sort Description The version number of the referral promotion template.
TemplateCategory	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update

Field	Details
	<p>Description</p> <p>Specifies the type of promotion template based on target markets.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • B2B - Business to Business • B2C - Business to Customer <p>The default value is B2C - Business to Customer.</p>

Associated Objects

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

PromotionTemplateShare on page 114

Sharing is available for the object.

PromTmplExtdRewardDef

Represents a junction between promotion template and extended reward definition. This object is available in API version 64.0 and later.

Supported Calls

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

Fields

Field	Details
AudienceType	<p>Type</p> <p>picklist</p> <p>Properties</p> <p>Create, Defaulted on create, Filter, Group, Restricted picklist, Sort</p> <p>Description</p> <p>Indicates the reward type for the Advocate or Friend.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Advocate • Friend—For B2B referral programs friend represents referred party <p>The default value is Advocate.</p>

Field	Details
ExtendedRewardDefinitionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The ID of the reward definition associated with the promotion template. This field is a relationship field.</p> <p>Relationship Name ExtendedRewardDefinition</p> <p>Refers To ExtendedRewardDefinition</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user referenced this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user viewed this record.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The unique number of the promotion template extended reward definition.</p>
PromotionTemplateId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The ID of the parent promotion template record. This field is a relationship field.</p>

Field	Details
	Relationship Name PromotionTemplate
	Relationship Type Master-detail
	Refers To PromotionTemplate (the master object)

Associated Objects

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

[PromTplExtRewardDefChangeEvent](#) on page 116

Change events are available for the object.

Referral

Represents the details of a referral submitted by an advocate. This object is available in API version 59.0 and later.

Supported Calls

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

Fields

Field	Details
ClientEmail	Type email
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The email of the referred party
ClientName	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The name of the referred party.

Field	Details
ClientPhone	<p>Type phone</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The phone number of the referred party.</p>
CurrentPromotionStageId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the promotion stage that the referral is at. This field is a relationship field.</p> <p>Relationship Name CurrentPromotionStage</p> <p>Relationship Type Lookup</p> <p>Refers To PromotionStage</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user referenced this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user viewed this record.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Required. The unique number of the record.</p>

Field	Details
OpportunityId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the opportunity for the account or lead for which referral record is created. This field is a relationship field.</p> <p>Relationship Name Opportunity</p> <p>Refers To Opportunity</p>
OrderId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The order associated with the Referral. This field is a relationship field.</p> <p>Relationship Name Opportunity</p> <p>Refers To Opportunity</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The owner of the record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
PromotionId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the referral promotion that the advocate signed up to submit the referral. This field is a relationship field.</p> <p>Relationship Name Promotion</p> <p>Relationship Type Lookup</p> <p>Refers To Promotion</p>
ReferralDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date on which the advocate submitted the referral.</p>
ReferralType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Required. The type of referral. In Referral Marketing, the type is always Inbound. Possible values are:</p> <ul style="list-style-type: none"> • INBOUND • INTERNAL—Reserved for internal use and isn't required for B2C or B2B referral programs. Don't use this value to customize or extend your implementation. • OUTBOUND—Reserved for internal use and isn't required for B2C or B2B referral programs. Don't use this value to customize or extend your implementation.
ReferredPartyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the Contact or the Person Account of the friend referred by the advocate for a B2C referral program. The ID of the Lead or the Business Account of the party referred by the advocate for a B2B referral program</p>

Field	Details
	<p>This field is a polymorphic relationship field.</p> <p>Relationship Name ReferredParty</p> <p>Relationship Type Lookup</p> <p>Refers To Account, Contact</p>
ReferrerId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the Contact or the Person Account of the advocate who submitted the referral for a B2C referral program. The ID of the Business Account of the advocate who submitted the referral for a B2B referral program This field is a polymorphic relationship field.</p> <p>Relationship Name Referrer</p> <p>Relationship Type Lookup</p> <p>Refers To Account, Contact, LoyaltyProgramMember</p>
Source	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The source where the advocate submitted the referral. Possible values are:</p> <ul style="list-style-type: none"> • Application • Email • Message • Other • Phone • Social Media • Walk-In

Field	Details
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Reserved for internal use and isn't required for B2C or B2B referral programs. Don't use this field to customize or extend your implementation.</p>
UsageType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies which Salesforce product that created the record. Possible values are:</p> <ul style="list-style-type: none"> • Loyalty Management—Reserved for internal use and isn't required for B2C or B2B referral programs. Don't use this value to customize or extend your implementation. • Public Sector Solutions—Reserved for internal use and isn't required for B2C or B2B referral programs. Don't use this value to customize or extend your implementation. • Referral Management—Use this value for Referral Marketing activities.

Associated Objects

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

[ReferralFeed](#) on page 103

Feed tracking is available for the object.

[ReferralHistory](#) on page 110

History is available for tracked fields of the object.

[ReferralOwnerSharingRule](#) on page 112

Sharing rules are available for the object.

[ReferralShare](#) on page 114

Sharing is available for the object.

TransactionJournal

Represents the details of an advocate or their referred party's activity. This object is available in API version 49.0 and later.

Supported Calls

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

Fields

Field	Details
ActivityDate	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description Required. The date of the event.</p>
ExternalTransactionNumber	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The reference number of event from an external system.</p>
JournalSubTypeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the journal subtype associated with the transaction journal. The associated journal subtype specifies the type of event for which the transaction journal is created. This field is a relationship field.</p> <p>Relationship Name JournalSubType</p> <p>Relationship Type Lookup</p> <p>Refers To JournalSubType</p>
JournalTypeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The ID of the journal type associated with the transaction journal. In Referral Marketing, the journal type is always Referral. This field is a relationship field.</p> <p>Relationship Name JournalType</p> <p>Relationship Type Lookup</p> <p>Refers To JournalType</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user referenced this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user viewed this record.</p>
LoyaltyProgramId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the referral program for which the transaction journal was created. This field is a relationship field.</p> <p>Relationship Name LoyaltyProgram</p> <p>Relationship Type Lookup</p> <p>Refers To LoyaltyProgram</p>
MemberId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the advocate's Loyalty Program Member record that's associated with the transaction journal. This field is a polymorphic relationship field.</p> <p>Relationship Name Member</p> <p>Relationship Type Lookup</p> <p>Refers To LoyaltyProgramMember</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The unique number of the transaction journal.</p>
PromotionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the promotion for which the transaction journal was created. This field is a relationship field.</p> <p>Relationship Name Promotion</p> <p>Relationship Type Lookup</p> <p>Refers To Promotion</p>
ReferralCode	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The referral code that was used by a referred party to sign up as a new customer.</p>

Field	Details
ReferralId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the Referral record associated with the referred party. This field is a relationship field.</p> <p>Relationship Name Referral</p> <p>Relationship Type Lookup</p> <p>Refers To Referral</p>
ReferredMemberId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Reserved for internal use and isn't required for B2C or B2B referral programs. Don't use this field to customize or extend your implementation. This field is a relationship field.</p> <p>Relationship Name ReferredMember</p> <p>Relationship Type Lookup</p> <p>Refers To LoyaltyProgramMember</p>
ReferredPartyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the Contact or Person Account associated with the referred friend for a B2C referral program. The ID of the Lead or Business Account associated with the referred party for a B2B referral program. This field is a polymorphic relationship field.</p> <p>Relationship Name ReferredParty</p>

Field	Details
	Relationship Type Lookup Refers To Account, Contact
Status	Type picklist Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update Description Required. The status of the transaction journal. Possible values are: <ul style="list-style-type: none"> Cancelled Error Pending Processed Approved—Reserved for internal use and isn't required for B2C or B2B referral programs. Don't use this field to customize or extend your implementation. ProcessingError—Reserved for internal use and isn't required for B2C or B2B referral programs. Don't use this field to customize or extend your implementation. SystemApproved—Reserved for internal use and isn't required for B2C or B2B referral programs. Don't use this field to customize or extend your implementation. SystemRejected—Reserved for internal use and isn't required for B2C or B2B referral programs. Don't use this field to customize or extend your implementation. The default value is Pending.
TransactionAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description Reserved for internal use and isn't required for B2C or B2B referral programs. Don't use this field to customize or extend your implementation.
UsageType	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort Description Specifies which Salesforce product created the record. Possible values are:

Field	Details
	<ul style="list-style-type: none"> <code>Loyalty</code>—Reserved for internal use and isn't required for B2C or B2B referral programs. Don't use this value to customize or extend your implementation. <code>Rebates</code>—Reserved for internal use and isn't required for B2C or B2B referral programs. Don't use this value to customize or extend your implementation. <code>Referral</code>—Use this value for Referral Marketing activities.

Voucher

Represents the details of a voucher that's issued to an advocate or to a referred friend. This object is available in API version 59.0 and later.

Referral Marketing automatically issues vouchers to advocates when their referrals sign up and issues vouchers to referrals when they complete their first purchase.

Supported Calls

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

Fields

Field	Details
<code>AccountId</code>	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort</p> <p>Description The ID of the business account associated with the advocate or referred party who is issued the voucher for a B2B referral program. This field is a relationship field.</p> <p>Relationship Name Account</p> <p>Refers To Account</p>
<code>ContactId</code>	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort</p>

Field	Details
	<p>Description The ID of the contact associated with the advocate or referred friend who is issued the voucher for a B2C referral program. This field is a relationship field.</p> <p>Relationship Name Contact</p> <p>Relationship Type Lookup</p> <p>Refers To Contact</p>
DiscountPercent	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The percentage of the discount that the voucher offers to the referred party it is issued to.</p>
EffectiveDate	<p>Type date</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. The date from which the referred party can redeem the voucher.</p>
ExpirationDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date on which the voucher expires and is no longer available for redemption.</p>
FaceValue	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The discount amount that the voucher offers to the referred party it is issued to.</p>
LastReferencedDate	<p>Type dateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user referenced this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date on which a user viewed this record.</p>
LoyaltyProgramMemberId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort</p> <p>Description The ID of the loyalty program member associated with the advocate who is issued the voucher. This field is a relationship field.</p> <p>Relationship Name LoyaltyProgramMember</p> <p>Relationship Type Lookup</p> <p>Refers To LoyaltyProgramMember</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The unique number of the issued voucher.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The owner of the record. This field is a polymorphic relationship field.</p>

Field	Details
	Relationship Name Owner
	Relationship Type Lookup
	Refers To Group, User
PromotionId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The ID of the referral promotion that issued to voucher. This field is a relationship field.
	Relationship Name Promotion
	Relationship Type Lookup
	Refers To Promotion
Reason	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The reason why the voucher was issued.
RedeemedValue	Type currency
	Properties Create, Filter, Nillable, Sort, Update
	Description The value that the advocate or referred party has already redeemed from the voucher. This field is only valid for vouchers that are issued using a FixedValue type voucher definition.
RemainingValue	Type currency
	Properties Filter, Nillable, Sort

Field	Details
	<p>Description</p> <p>The value that the advocate or referred party is yet to redeem from the voucher. This field is only valid for vouchers that are issued using a FixedValue type voucher definition.</p>
Status	<p>Type</p> <p>picklist</p> <p>Properties</p> <p>Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description</p> <p>Required. Specifies the status of the voucher.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> Cancelled Expired Issued Redeemed <p>The default value is Issued.</p>
TransactionJournalId	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p>Description</p> <p>The ID of the transaction journal that represents the advocate or referred party event for which the voucher was issued.</p> <p>This field is a relationship field.</p> <p>Relationship Name</p> <p>TransactionJournal</p> <p>Relationship Type</p> <p>Lookup</p> <p>Refers To</p> <p>TransactionJournal</p>
UseDate	<p>Type</p> <p>date</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p>Description</p> <p>The date on which the advocate or the referred party used the voucher.</p>
VoucherCode	<p>Type</p> <p>string</p>

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update Description The unique code of the voucher.
VoucherDefinitionId	Type reference Properties Create, Filter, Group, Nillable, Sort Description The ID of the voucher definition that was used to issue the voucher. This field is a relationship field. Relationship Name VoucherDefinition Relationship Type Lookup Refers To VoucherDefinition

Associated Objects

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

[VoucherHistory](#) on page 110

History is available for tracked fields of the object.

[VoucherOwnerSharingRule](#) on page 112

Sharing rules are available for the object.

[VoucherShare](#) on page 114

Sharing is available for the object.

VoucherDefinition

Represents information about the voucher template. A voucher definition is used to issue vouchers to advocates and their referred parties. This object is available in API version 59.0 and later.

Supported Calls

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

Fields

Field	Details
AutogeneratedCodeLength	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The length of the autogenerated code of vouchers issued using the voucher definition. If no value is specified, the default length is eight digits.</p>
CodePrefix	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The prefix of the autogenerated code of vouchers issued using the voucher definition.</p>
CodeSuffix	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The suffix of the autogenerated code of vouchers issued using the voucher definition.</p>
CostPerVoucher	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The liability that the company incurs for each voucher issued using the voucher definition.</p>
Description	<p>Type textarea</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The description or the business use of the voucher definition.</p>
DiscountPercent	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	Description The percentage of discount that vouchers issued using the voucher definition provide the advocates and their referred parties.
EffectiveDate	Type date Properties Create, Filter, Group, Sort, Update Description Required. The date from which advocates or their referred parties can redeem vouchers issued using the definition.
ExpirationDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date until which advocates or their referred parties can redeem vouchers issued using the definition.
ExpirationPeriod	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The number of days or months that vouchers issued using the voucher definition are valid since the date it's issued.
ExpirationPeriodUnit	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies whether the expiration period of vouchers issued using the voucher definition is in days or months. Possible values are: <ul style="list-style-type: none"> • Days • Months
ExpirationType	Type picklist

Field	Details
	<p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Required. Specifies whether vouchers issued using the voucher definition are valid until the expiration date or are valid for a specific period.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • <code>FixedDate</code>—Fixed Date • <code>Period</code>
FaceValue	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The discount amount that advocates and their referred parties get when they redeem vouchers issued using the voucher definition.</p>
ImageUrl	<p>Type url</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The URL of the file that contains the marketing image of the voucher definition.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Required. Indicates whether the voucher definition is active (<code>true</code>) or not (<code>false</code>). You can only issue vouchers using active voucher definitions.</p> <p>The default value is <code>false</code>.</p>
IsPartialRedeemable	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether advocates and referrals can redeem the complete value of a voucher issued using the voucher definition across multiple transactions. You can only specify <code>true</code> for voucher definition of the type <code>FixedValue</code>.</p>

Field	Details
	The default value is <code>false</code> .
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The most recent date on which a user referenced this record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The most recent date on which a user viewed this record.
LoyaltyProgramId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The ID of the referral program that the voucher belongs to. This field is a relationship field. Relationship Name LoyaltyProgram Relationship Type Lookup Refers To LoyaltyProgram
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the voucher definition. The name can't contain special characters.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	<p>Description The owner of the record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
PartnerAccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Reserved for internal use and isn't required for B2C or B2B referral programs. Don't use this field to customize or extend your implementation. This field is a relationship field.</p> <p>Relationship Name PartnerAccount</p> <p>Relationship Type Lookup</p> <p>Refers To Account</p>
ProductDerivedFieldId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The ID of the product associated with the voucher definition. This field is a relationship field.</p> <p>Relationship Name ProductDerivedField</p> <p>Relationship Type Lookup</p> <p>Refers To Product2</p>
ProductId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the product that advocates and their referred parties can purchase by redeeming vouchers issued using the definition. If the voucher definition is of the type ProductOrService, specify the ID of the product that advocates or referrals get when they redeem the voucher. This field is a polymorphic relationship field.</p> <p>Relationship Name Product</p> <p>Relationship Type Lookup</p> <p>Refers To Product2</p>
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort</p> <p>Description Required. Specifies the type of reward that advocates or their referred parties get when they redeem vouchers issued using the voucher definition. Possible values are:</p> <ul style="list-style-type: none"> • <code>DiscountPercentage</code>—Discount Percentage • <code>FixedValue</code>—Fixed Value • <code>ProductOrService</code>—Product or Service

Associated Objects

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

[VoucherDefinitionHistory](#) on page 110

History is available for tracked fields of the object.

[VoucherDefinitionOwnerSharingRule](#) on page 112

Sharing rules are available for the object.

[VoucherDefinitionShare](#) on page 114

Sharing is available for the object.

CHAPTER 3 Fields on Standard Objects

In this chapter ...

- [Referral Marketing Fields on InternalOrganizationUnit](#)

Referral Marketing has added standard fields to some standard Salesforce objects to represent information specific to Referral Marketing's connection with Marketing Cloud. These fields are available only in orgs where Referral Marketing is enabled.

Referral Marketing Fields on InternalOrganizationUnit

Standard fields extend the InternalOrganizationUnit object for use in Referral Marketing to represent information about Referral Marketing's connection with a Marketing Cloud business unit. The Referral Marketing fields on InternalOrganizationUnit are available in API version 60.0 and later. These fields are available only for B2C referral programs.

Supported Calls

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

Fields

Field	Details
BusinessUsage	<p>Type</p> <p>picklist</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description</p> <p>The business purpose of the record.</p> <p>Possible value is:</p> <ul style="list-style-type: none">• REFERRAL_MARKETING
EmailConfiguration	<p>Type</p> <p>string</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p>Description</p> <p>The send classification that's used by the connected Marketing Cloud business unit to send emails.</p>
OrganizationIdentifier	<p>Type</p> <p>string</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p>Description</p> <p>The name of the company's Marketing Cloud business unit that Referral Marketing is connected to.</p>

SEE ALSO:

[InternalOrganizationUnit](#)

CHAPTER 4 Associated Objects

In this chapter ...

- [StandardObjectNameFeed](#)
- [StandardObjectNameHistory](#)
- [StandardObjectNameOwnershipRule](#)
- [StandardObjectNameShare](#)
- [StandardObjectNameChangeEvent](#)

This section provides a list of objects associated with Referral Marketing and B2B Referral Management standard objects, along with their standard fields.

Some fields may not be listed for some objects. To see the system fields for each object, see [System Fields](#).

To verify the complete list of fields for an object, use a describe call from the API or inspect with an appropriate tool. For example, inspect the WSDL or use a schema viewer.

StandardObjectNameFeed

StandardObjectNameFeed is the model for all feed objects associated with standard objects. These objects represent the posts and feed-tracked changes of a standard object.

The object name is variable and uses *StandardObjectNameFeed* syntax. For example, *AccountFeed* represents the posts and feed-tracked changes on an account record. We list the available associated feed objects at the end of this topic. For specific version information, see the documentation for the standard object.

Supported Calls

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

Special Access Rules

In the internal org, users can delete all feed items they created. This rule varies in Experience Cloud sites where threaded discussions and delete-blocking are enabled. Site members can delete all feed items they created, provided the feed items don't have content nested under them—like a comment, answer, or reply. Where the feed item has nested content, only feed moderators and users with the Modify All Data permission can delete threads.

To delete feed items they didn't create, users must have one of these permissions:

- Modify All Data
- Modify All Records on the parent object, like Account for AccountFeed
- Moderate Chatter




Note: Users with the Moderate Chatter permission can delete only the feed items and comments they can see.

Only users with this permission can delete items in unlisted groups.

For more special access rules, if any, see the documentation for the standard object. For example, for AccountFeed, see the special access rules for Account.

Fields

Field	Details
BestCommentId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The ID of the comment marked as best answer on a question post. This field is available in API version 44.0 and later.</p>
Body	<p>Type textarea</p>


Field	Details
	<p>Properties Nillable, Sort</p> <p>Description The body of the post. Required when <code>Type</code> is <code>TextPost</code>. Optional when <code>Type</code> is <code>ContentPost</code> or <code>LinkPost</code>.</p>
<code>CommentCount</code>	<p>Type int</p> <p>Properties Filter, Group, Sort</p> <p>Description The number of comments associated with this feed item.</p> <p> Tip: In a feed that supports pre-moderation, <code>CommentCount</code> isn't updated until a comment is published. For example, say that you comment on a post that already has one published comment and your comment triggers moderation. Now there are two comments on the post, but the count says there's only one. In a moderated feed, comments aren't counted until approved by an admin or someone with <code>Can Approve Feed Post and Comment</code> or <code>Modify All Data</code>.</p> <p>Feed moderation has implications on how you retrieve feed comments. In a moderated feed, rather than retrieving comments by looping through <code>CommentCount</code>, go through pagination until the end of comments is returned.</p>
<code>ConnectionId</code>	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description When a <code>PartnerNetworkConnection</code> modifies a record that is tracked, the <code>CreatedBy</code> field contains the ID of the system administrator. The <code>ConnectionId</code> contains the ID of the <code>PartnerNetworkConnection</code>. Available if Salesforce to Salesforce is enabled for your organization.</p>
<code>ContentData</code>	<p>Type base64</p> <p>Properties Nillable</p> <p>Description Available in API version 36.0 and earlier only. Required if <code>Type</code> is <code>ContentPost</code>. Encoded file data in any format, and can't be 0 bytes. Setting this field automatically sets <code>Type</code> to <code>ContentPost</code>.</p>

Field	Details
ContentDescription	<p>Type textarea</p> <p>Properties Nillable, Sort</p> <p>Description Available in API version 36.0 and earlier only. The description of the file specified in <code>ContentData</code>.</p>
ContentFileName	<p>Type string</p> <p>Properties Group, Nillable, Sort</p> <p>Description Available in API version 36.0 and earlier only. This field is required if <code>Type</code> is <code>ContentPost</code>. The name of the file uploaded to the feed. Setting <code>ContentFileName</code> automatically sets <code>Type</code> to <code>ContentPost</code>.</p>
ContentSize	<p>Type int</p> <p>Properties Group, Nillable, Sort</p> <p>Description Available in API version 36.0 and earlier only. The size of the file (in bytes) uploaded to the feed. This field is read-only and is automatically determined during insert.</p>
ContentType	<p>Type string</p> <p>Properties Group, Nillable, Sort</p> <p>Description Available in API version 36.0 and earlier only. The MIME type of the file uploaded to the feed. This field is read-only and is automatically determined during insert.</p>
FeedPostId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description This field was removed in API version 22.0, and is available in earlier versions for backward compatibility only. ID of the associated FeedPost. A FeedPost represents the following types of changes in a feed item: changes to tracked fields, text posts, link posts, and content posts.</p>

[illegible]

Field	Details
	<p>Properties Filter, Group, Sort</p> <p>Description The number of likes associated with this feed item.</p>
LinkUrl	<p>Type url</p> <p>Properties Nillable, Sort</p> <p>Description The URL of a <code>LinkPost</code>.</p>
NetworkScope	<p>Type picklist</p> <p>Properties Group, Nillable, Restricted picklist, Sort</p> <p>Description Specifies whether this feed item is available in the default Experience Cloud site, a specific Experience Cloud site, or all sites. This field is available in API version 26.0 and later, if digital experiences is enabled for your org.</p> <p><code>NetworkScope</code> can have the following values:</p> <ul style="list-style-type: none"> <code>NetworkId</code>—The ID of the Experience Cloud site in which the <code>FeedItem</code> is available. If left empty, the feed item is only available in the default Experience Cloud site. <code>AllNetworks</code>—The feed item is available in all Experience Cloud sites. <p>Note the following exceptions for <code>NetworkScope</code>:</p> <ul style="list-style-type: none"> Only feed items with a Group or User parent can set a <code>NetworkId</code> or a null value for <code>NetworkScope</code>. For feed items with a record parent, users can set <code>NetworkScope</code> only to <code>AllNetworks</code>. You can't filter a feed item on the <code>NetworkScope</code> field.
ParentId	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description ID of the record that is tracked in the feed. The detail page for the record displays the feed.</p>
RelatedRecordId	<p>Type reference</p>

Field	Details
	<p>Properties Group, Nillable, Sort</p> <p>Description ID of the ContentVersion record associated with a ContentPost. This field is null for all posts except ContentPost.</p>
Title	<p>Type string</p> <p>Properties Group, Nillable, Sort</p> <p>Description The title of the feed item. When the Type is LinkPost, the LinkUrl is the URL and this field is the link name.</p>
Type	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description The type of feed item:</p> <ul style="list-style-type: none"> • ActivityEvent—indirectly generated event when a user or the API adds a Task associated with a feed-enabled parent record (excluding email tasks on cases). Also occurs when a user or the API adds or updates a Task or Event associated with a case record (excluding email and call logging). For a recurring Task with CaseFeed disabled, one event is generated for the series only. For a recurring Task with CaseFeed enabled, events are generated for the series and each occurrence. • AdvancedTextPost—created when a user posts a group announcement and, in Lightning Experience as of API version 39.0 and later, when a user shares a post. • AnnouncementPost—Not used. • ApprovalPost—generated when a user submits an approval. • BasicTemplateFeedItem—Not used. • CanvasPost—a post made by a canvas app posted on a feed. • CollaborationGroupCreated—generated when a user creates a public group. • CollaborationGroupUnarchived—Not used. • ContentPost—a post with an attached file. • CreatedRecordEvent—generated when a user creates a record from the publisher. • DashboardComponentAlert—generated when a dashboard metric or gauge exceeds a user-defined threshold. • DashboardComponentSnapshot—created when a user posts a dashboard snapshot on a feed.

Field	Details
	<ul style="list-style-type: none"> • LinkPost—a post with an attached URL. • PollPost—a poll posted on a feed. • ProfileSkillPost—generated when a skill is added to a user’s Chatter profile. • QuestionPost—generated when a user posts a question. • ReplyPost—generated when Chatter Answers posts a reply. • RypplePost—generated when a user creates a Thanks badge in WDC. • TextPost—a direct text entry on a feed. • TrackedChange—a change or group of changes to a tracked field. • UserStatus—automatically generated when a user adds a post. Deprecated. <p>The following values appear in the Type picklist for all feed objects but apply only to CaseFeed:</p> <ul style="list-style-type: none"> • CaseCommentPost—generated event when a user adds a case comment for a case object • EmailMessageEvent—generated event when an email related to a case object is sent or received • CallLogPost—generated event when a user logs a call for a case through the user interface. CTI calls also generate this event. • ChangeStatusPost—generated event when a user changes the status of a case • AttachArticleEvent—generated event when a user attaches an article to a case <p> Note: If you set Type to ContentPost, also specify ContentData and ContentFileName.</p>
Visibility	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Specifies whether this feed item is available to all users or internal users only. This field is available in API version 26.0 and later, if digital experiences is enabled for your organization.</p> <p>Visibility can have the following values:</p> <ul style="list-style-type: none"> • AllUsers—The feed item is available to all users who have permission to see the feed item. • InternalUsers—The feed item is available to internal users only. <p>Note the following exceptions for Visibility:</p> <ul style="list-style-type: none"> • For record posts, Visibility is set to InternalUsers for all internal users by default. • External users can set Visibility only to AllUsers. • On user and group posts, only internal users can set Visibility to InternalUsers.

Usage

A feed for an object is automatically created when a user enables feed tracking for the object. Use feeds to track changes to records. For example, `AccountFeed` tracks changes to an account record. Use feed objects to retrieve the content of feed fields, such as type of feed or feed ID.

- `NewsFeed` and `UserProfileFeed` are available in API version 18.0 through API version 26.0. In API version 27.0 and later, `NewsFeed` and `UserProfileFeed` are no longer available in SOAP API. Use Connect REST API to access `NewsFeed` and `UserProfileFeed`.

Use the `NewsFeed` object to query and retrieve lead feed items associated with a converted lead record.

- For `NewsFeed` and `UserProfileFeed`, users who don't have the View All Data permission have the following limitations when querying records: Must specify a `LIMIT` clause and the limit must be less than or equal to 1000. Can include a `WHERE` clause that references object fields, but can't include references to fields in related objects. For example, you can filter by `CreatedDate` or `ParentId`, but not by `Parent.Name`. Can include an `ORDER BY` clause that references object fields, but can't include references to fields in related objects. For example, `ORDER BY CreatedDate` or `ParentId`, but not by `Parent.Name`. To query for the most recent feed items, `ORDER BY CreatedDate DESC, Id DESC`.

Note the following SOQL restrictions. No SOQL limit if logged-in user has View All Data permission. If not, specify a `LIMIT` clause of 1,000 records or fewer. SOQL `ORDER BY` on fields using relationships isn't available. Use `ORDER BY` on fields on the root object in the SOQL query.

- The name `Article_Type__Feed` is variable, where `Article Type` is the object name for the article type associated with the article. For example, `Offer__Feed` represents a feed on an article of type `Offer`.
- Field Service must be enabled in your organization for `ServiceAppointmentFeed`, `ServiceCrewFeed`, `ServiceMemberFeed`, `ServiceResourceCapacityFeed`, `ServiceResourceFeed`, `ServiceResourceSkillFeed`, `ServiceTerritoryFeed`, `ServiceTerritoryMemberFeed`, and `SkillRequirementFeed`.
- For `WorkOrderFeed`, Work Orders or Field Service must be enabled in your organization.
- On `UserFeed`, if you use the `FeedComment` object to comment on a user record, the user can delete the comment. For example, if John Smith adds a comment to the feed on Sasha Jones' user record, Sasha can delete the comment.

Objects That Follow This Model

These objects follow the standard pattern for associated Feed objects.

- [LoyaltyProgram](#) on page 28
- [Promotion](#) on page 49
- [PromotionMarketSegment](#) on page 59
- [Referral](#) on page 77

StandardObjectNameHistory

`StandardObjectNameHistory` is the model for all history objects associated with standard objects. These objects represent the history of changes to the values in the fields of a standard object.

The object name is variable and uses `StandardObjectNameHistory` syntax. For example, `AccountHistory` represents the history of changes to the values of an account record's fields. We list the available associated history objects at the end of this topic. For specific version information, see the documentation for the standard object.

Supported Calls

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

You can also enable `delete()` in API version 42.0 and later. See [Enable delete of Field History and Field History Archive](#).

Special Access Rules

For specific special access rules, if any, see the documentation for the standard object. For example, for AccountHistory, see the special access rules for Account.

Fields

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

Field Name	Details
	Properties Nillable, Sort
	Description Old value of the field that was changed.

Objects That Follow This Model


These objects follow the standard pattern for associated History objects.

- [JournalSubType](#) on page 17
- [JournalType](#) on page 19
- [LoyaltyPgmEngmtAttribute](#) on page 21
- [LoyaltyPgmMbrAttributeValHistory](#) on page 25
- [LoyaltyProgram](#) on page 28
- [LoyaltyProgramMbrPromotion](#) on page 30
- [LoyaltyProgramMember](#) on page 33
- [LoyaltyProgramProcess](#) on page 40
- [LoyaltyProgramProcessRule](#) on page 44
- [Promotion](#) on page 49
- [PromotionMarketSegment](#) on page 59
- [Referral](#) on page 77
- [Voucher](#) on page 88
- [VoucherDefinition](#) on page 93

*StandardObjectName*OwnerSharingRule

StandardObjectNameOwnerSharingRule is the model for all owner sharing rule objects associated with standard objects. These objects represent a rule for sharing a standard object with users other than the owner.

The object name is variable and uses *StandardObjectNameOwnerSharingRule* syntax. For example, *ChannelProgramOwnerSharingRule* is a rule for sharing a channel program with users other than the channel program owner. The available associated owner sharing rule objects are listed at the end of this topic. For specific version information, see the standard object documentation.

 **Note:** To enable access to this object, contact Salesforce customer support. But we recommend that you use Metadata API to programmatically update owner sharing rules instead because it triggers automatic sharing rule recalculation. The [SharingRules](#) Metadata API type is enabled for all orgs.


Supported Calls

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

Special Access Rules

For specific special access rules, if any, see the documentation for the standard object. For example, for ChannelProgramOwnerSharingRule, see the special access rules for ChannelProgram.

Fields

Field Name	Details
AccessLevel	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Determines the level of access users have to records. Values are:</p> <ul style="list-style-type: none"> • Read (read only) • Edit (read/write)
Description	<p>Type textarea</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Description of the sharing rule. Maximum length is 1,000 characters.</p>
DeveloperName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The unique name of the object in the API. This name can contain only underscores and alphanumeric characters and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package, and the changes are reflected in a subscriber's organization.</p> <p> Note: When creating large sets of data, always specify a unique DeveloperName for each record. If no DeveloperName is specified, performance can slow while Salesforce generates one for each record.</p>
GroupId	<p>Type reference</p>

Field Name	Details
	Properties Create, Filter, Group, Sort Description ID of the source group. Records that are owned by users in the source group trigger the rule to give access.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description Label of the sharing rule as it appears in the UI. Maximum length is 80 characters.
UserOrGroupId	Type reference Properties Create, Filter, Group, Sort Description ID of the user or group that you're granting access to.

Objects That Support Change Events

These objects have associated OwnerSharingRule objects.

- [JournalType](#) on page 19
- [LoyaltyProgram](#) on page 28
- [LoyaltyProgramMember](#) on page 33
- [LoyaltyProgramProcess](#) on page 40
- [Promotion](#) on page 49
- [Referral](#) on page 77
- [Voucher](#) on page 88
- [VoucherDefinition](#) on page 93

StandardObjectNameShare

StandardObjectNameShare is the model for all share objects associated with standard objects. These objects represent a sharing entry on the standard object.

The object name is a variable and uses *StandardObjectNameShare* syntax. For example, AccountBrandShare is a sharing entry on an account brand. For specific version information, see the standard object documentation.

You can only create, edit, and delete sharing entries for standard objects whose `RowCause` field is set to `Manual`. Sharing entries for standard objects with different `RowCause` values are created as a result of your Salesforce org's sharing configuration and are read-only. For some sharing mechanisms, such as sharing sets, sharing entries aren't stored at all.



Note: While Salesforce currently maintains read-only sharing entries for multiple sharing mechanisms, it's possible that we'll stop storing certain share records to improve performance. As a best practice, don't create customizations that rely on the availability of these sharing entries. Any changes to sharing behavior will be communicated before they occur.

Supported Calls

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

Special Access Rules

For specific special access rules, if any, see the documentation for the standard object. For example, for `AccountBrandShare`, see the special access rules for `AccountBrand`.

Fields

Field Name	Details
<code>AccessLevel</code>	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Level of access allowed. Values are:</p> <ul style="list-style-type: none"> • <code>All</code> (owner) • <code>Edit</code> (read/write) • <code>Read</code> (read only)
<code>ParentId</code>	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description ID of the parent record.</p>
<code>RowCause</code>	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Reason that the sharing entry exists.</p>

Field Name	Details
UserOrGroupId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description ID of the user or group that has been given access to the object.</p>

Objects That Follow This Model

These objects follow the standard pattern for associated Share objects.

- [CommunicationChannelTemplate](#) on page 4
- [JournalType](#) on page 19
- [LoyaltyProgram](#) on page 28
- [LoyaltyProgramMember](#) on page 33
- [LoyaltyProgramProcess](#) on page 40
- [LoyaltyProgramWidget](#) on page 46
- [Promotion](#) on page 49
- [PromotionTemplate](#) on page 71
- [Referral](#) on page 77
- [Voucher](#) on page 88
- [VoucherDefinition](#) on page 93

*StandardObject*NameChangeEvent

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

Supported Calls

`describeSObjects()`

Special Access Rules

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

Change Event Support

Change events are available for all custom objects and a subset of standard objects. Change events that correspond to custom settings are partially supported. They aren't supported in Apex triggers but are supported in other types of subscribers. For more information about standard object support, see the Objects That Support Change Events section below.

Change Event Name

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

Standard Object Change Event Name

```
<Standard_Object_Name>ChangeEvent
```

Example: AccountChangeEvent

Custom Object Change Event Name

```
<Custom_Object_Name>__ChangeEvent
```

Example: MyCustomObject__ChangeEvent

Change Event Fields

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

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

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

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

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

Event Message Example

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

```
{
  "schema": "IeRuaY6cbI_HsV8Rv1Mc5g",
  "payload": {
    "ChangeEventHeader": {
      "entityName": "Account",
      "recordIds": [
        "<record_ID>"
      ],
      "changeType": "CREATE",
      "changeOrigin": "com/salesforce/api/soap/51.0;client=SfdcInternalAPI/",
      "transactionKey": "0002343d-9d90-e395-ed20-cf416ba652ad",

```

```
    "sequenceNumber": 1,
    "commitTimestamp": 1612912679000,
    "commitNumber": 10716283339728,
    "commitUser": "<User_ID>"
  },
  "Name": "Acme",
  "Description": "Everyone is talking about the cloud. But what does it mean?",
  "OwnerId": "<Owner_ID>",
  "CreatedDate": "2021-02-09T23:17:59Z",
  "CreatedById": "<User_ID>",
  "LastModifiedDate": "2021-02-09T23:17:59Z",
  "LastModifiedById": "<User_ID>"
},
"event": {
  "replayId": 6
}
}
```

API Version and Schema

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

Usage

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

Objects That Support Change Events

These objects have associated ChangeEvent objects.

- [ExtendedReward](#) on page 8
- [ExtendedRewardDefinition](#) on page 12
- [PromTmplExtRewardDefChangeEvent](#) on page 75

CHAPTER 5 Referral Marketing Business APIs

In this chapter ...

- [REST Reference](#)

Referral Marketing Business APIs are RESTful APIs that are sometimes available as Apex classes and methods.

REST Reference

You can access Referral Marketing 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 Referral Marketing API resources.

[Request Bodies](#)

Here's a list of Referral Marketing API request bodies.

[Response Bodies](#)

Here's a list of Referral Marketing API response bodies.

Resources

Here's a list of Referral Marketing API resources.

[Referral Advocate Enrollments \(POST\)](#)

Enroll an existing or new customer as an advocate of a referral promotion.

[Redeem Voucher \(POST\)](#)

Redeem a voucher for an advocate or their referred friend.

[Referral Event \(POST\)](#)

Create referral event records when an advocate refers a friend, or when referred friends sign up or make a purchase.

[Referral Advocate Profile \(POST\)](#)

View the profile of a referral program advocate.

Referral Advocate Enrollments (POST)

Enroll an existing or new customer as an advocate of a referral promotion.

Special Access Rules

To use this resource, your org must have person accounts enabled.

Resource

```
/referral-programs/{referralProgramName}/promotions/{promotionCode}/member-enrollments
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v64.0/referral-programs/demoProgram/promotions/DemoPromo1/member-enrollments
```

Available version

59.0

Requires Chatter

No

HTTP methods

POST

Request body for POST**Root XML tag**

referralMemberEnrollmentInput

JSON examples to enroll an existing referral program advocate to a promotion

```
{
  "membershipNumber": "M125"
}
```

```
{
  "contactId": "003xx000004Wsxc"
}
```

```
{
  "associatedPersonAccountDetails": {
    "firstName": "Mac",
    "lastName": "Ray",
    "email": "mray@salesforce.com",
    "allowDuplicateRecords": "false",
    "additionalPersonAccountFieldValues": {
      "attributes": {
        "country__c": "US"
      }
    }
  },
  "memberStatus": "Active",
  "transactionJournalStatementFrequency": "Monthly",
  "transactionJournalStatementMethod": "Mail",
  "enrollmentChannel": "Email",
  "additionalMemberFieldValues": {
    "attributes": {
      "state__c": "California"
    }
  }
}
```

JSON example to enroll a new customer as an advocate of a promotion

```
{
  "membershipNumber": "M125",
  "associatedPersonAccountDetails": {
    "firstName": "Mac",
    "lastName": "Ray",
    "email": "mray@salesforce.com",
    "allowDuplicateRecords": "false",
    "additionalPersonAccountFieldValues": {
      "attributes": {
        "country__c": "US"
      }
    }
  }
},
```

```

    "memberStatus": "Active",
    "transactionJournalStatementFrequency": "Monthly",
    "transactionJournalStatementMethod": "Mail",
    "enrollmentChannel": "Email",
    "additionalMemberFieldValues": {
      "attributes": {
        "state__c": "California"
      }
    }
  }
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
additionalMemberFieldValues	Map<String, String>	Custom field values of the advocate.	Optional	59.0
additionalPersonAccountFieldValues	Map<String, String>	Custom field values from the advocate's person account.	Optional	59.0
associatedPersonAccountDetails	Person Account Input	Details of the advocate's person account.	Optional This field is required only if you don't have the contact ID or the membership number of the advocate.	59.0
contactId	String	Contact ID of the advocate to enroll to the referral promotion.	Optional This field is required only if you don't have the person account details or the membership number of the advocate.	59.0
enrollmentChannel	String	Channel that the advocate has used to join the referral program. Possible values are: <ul style="list-style-type: none"> • CallCenter • Email • Franchise • Mobile • Partner • Pos • Print 	Optional	59.0

Name	Type	Description	Required or Optional	Available Version
		<ul style="list-style-type: none"> • Social • Store • Web 		
memberStatus	String	<p>Status of the new advocate after enrollment.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Active • Inactive • Custom value - Any value you define in your org. For example, if an advocate must be evaluated before confirming enrollment, you can create a status called <code>On Hold</code> and assign it to this field. <p>The default value is <code>Active</code>.</p>	<p>Optional</p> <p>This field is required for enrolling a new advocate.</p>	59.0
membershipEndDate	String	Date the advocate's referral program membership ends.	Optional	59.0
membershipNumber	String	Unique membership number of the advocate.	<p>Optional</p> <p>This field is required only if you don't have the person account details or the contact ID of the advocate.</p>	59.0
shouldProcessTransactionsInRealTime	Boolean	Indicates whether the transaction journals created by the API are processed as soon as they're created (<code>true</code>) or not (<code>false</code>). The default value is <code>true</code> .	Optional	59.0
transactionJournalStatementFrequency	String	<p>Frequency at which transaction statements must be generated for the advocate.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Monthly • Quarterly 	Optional	59.0
transactionJournalStatementMethod	String	<p>Preferred method of receiving transaction journal statements.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Email 	Optional	59.0

Name	Type	Description	Required or Optional	Available Version
		<ul style="list-style-type: none"> Mail 		
isAutoEnrolled	Boolean	Indicates whether member is auto-enrolled for referral promotion (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code> .	Optional	64.0
isEnrollmentActive	Boolean	Indicates if the member is enrolled for the referral promotion (<code>true</code>) or not (<code>false</code>). The default value is <code>true</code> .	Optional	64.0

Response body for POST[Referral Member Enrollment](#)

Redeem Voucher (POST)

Redeem a voucher for an advocate or their referred friend.

Resource

```
/vouchers/{voucherCode}/redemption
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v64.0/vouchers/VC001/redemption
```

Available version

59.0

Requires Chatter

No

HTTP methods

POST

Request body for POST**JSON examples****JSON request to redeem a voucher for an advocate**

```
{
  "currencyIsoCode": "Yen",
  "programName": "ReferAFriend",
  "redemptionAmount": "12",
  "memberId": "01Mxx00000001grEAA"
}
```

JSON request to redeem a voucher for a referred friend

```
{
  "currencyIsoCode": "Yen",
  "programName": "ReferAFriend",
```



```

"redemptionAmount": "10",
"contactId": "003xx000004WkhEAAS"
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
contactId	String	Contact ID of the referred friend for whom the voucher is redeemed.	Required only for a referral.	59.0
currencyIsoCode	String	Three-letter ISO 4217 currency code of the monetary currency in which the voucher must be redeemed.	Optional This field is required if your Salesforce org supports multiple currencies.	59.0
memberId	String	Loyalty Program Member ID of the advocate for whom the voucher is redeemed.	Required only for an advocate. This field is optional if you provide the membership number of the advocate.	59.0
membershipNumber	String	Unique number of the advocate for whom the voucher is redeemed.	Required only for an advocate. This field is optional if you provide the member ID of the advocate.	59.0
programName	String	Name of the referral program to which the voucher belongs.	Optional This field is required when you provide the membership number of the advocate.	59.0
redemptionAmount	Double	Amount to be redeemed. A value isn't required when you want to redeem the complete value of the voucher in a single transaction.	Optional	59.0

Response body for POST

Industries Redeem Voucher

Referral Event (POST)

Create referral event records when an advocate refers a friend, or when referred friends sign up or make a purchase.

Special Access Rules

To use this resource, your org must have person accounts enabled.

Resource

```
/referral-program/referral-event
```

Example

```
https://yourInstance.salesforce.com/services/data/v64.0  
/referral-program/referral-event
```

Available version

59.0

Requires Chatter

No

HTTP methods

POST

Request body for POST

JSON example

Here's an example of a payload for an event where the existing member refers his friend, Michael Clare.

```
{  
  "referralCode": "2G11QW4G-PROMOCODE2809",  
  "firstName": "Michael",  
  "lastName": "Clare",  
  "email": "mclare@salesforce.com",  
  "activityDateTime": "2023-09-13T00:00:00",  
  "eventType": "Refer",  
  "referredPartyJournalSubtype": "Sample Activity",  
  "referralAdditionalAttributes": {  
    "attributes": {  
      "phoneNumber": "1234567890",  
      "emailOptOut": true  
    }  
  }  
}
```

Here's an example of a payload to know which channel did the referral come from.

```
{  
  "referralCode": "2G11QW4G-PROMOCODE2809",  
  "contactId": "003xx000004WkhEAAS",  
  "firstName": "Michael",  
  "lastName": "Clare",  
  "email": "michael.clare@salesforce.com",  
  "joiningDate": "2021-04-13T00:00:00",  
  "eventType": "Purchase",  
  "referralChannel": "Facebook",  
  "purchaseAmount": 40000,  
}
```

```

"purchaseQuantity": 34,
"referralAdditionalAttributes" : {
  "attributes": {
    "phoneNumber": "1234567890",
    "PersonHasOptedOutOfEmail": false,
  }
},
"transactionJournalAdditionalAttributes": {
},
"orderReferenceId": "003xx00000000fxEAA"
}

```

Here's an example of a payload for an event where Michael Clare signs up for the referral program.

```

{
  "referralCode": "2G1lQW4G-PROMOCODE2809",
  "contactId": "003xx000004WkhEAAS",
  "activityDateTime": "2023-09-13T00:00:00",
  "eventType": "Enrollment"
}

```

Here's an example of a payload for an event where Michael Clare purchases a product.

```

{
  "referralCode": "2G1lQW4G-PROMOCODE2809",
  "contactId": "003xx000004WkhEAAS",
  "activityDateTime": "2023-09-13T00:00:00",
  "referralStage": "Purchase",
  "productId": "01txx0000006iGyAAI",
  "purchaseAmount": 40000,
  "purchaseQuantity": 34,
  "referralAdditionalAttributes": {
    "attributes": {
      "phoneNumber": "1234567890",
      "emailOptOut": true
    }
  },
  "transactionJournalAdditionalAttributes": {
  }
}

```

Here's an example of a payload for an event where the existing member refers multiple friends.

```

{
  "referralCode": "0UGUXMNA-promotiontest098",
  "referralEmails": {
    "emails": [
      "kit.ryan@salesforce.com",
      "amy.sh@salesforce.com"
    ]
  },
  "activityDateTime": "2024-02-12T00:00:00",
  "eventType": "Refer",
  "referralAdditionalAttributes": {
    "attributes": {

```

```

    }
  },
  "transactionJournalAdditionalAttributes": {
  }
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
activityDateTime	String	The date and time when the referral event took place.	Optional This field is required only if the joining date isn't specified in the request.	59.0
contactId	String	Contact ID of the referred friend.	Optional Required if the referral record exists.	59.0
email	String	Email address of the referred friend.	Optional Required only if the contact ID of the referred friend doesn't exist.	59.0
eventType	String	Type of event completed by the referred friend or advocate. Possible values are: <ul style="list-style-type: none"> • Enrollment • Purchase • Refer 	Required	59.0
firstName	String	First name of the referred friend.	Optional Required only if the contact ID of the referred friend doesn't exist.	59.0
joiningDate	String	Date the referred friend joined as a new customer. This field has been deprecated. In API version 59.0 and later, use the new <code>activityDateTime</code> field.	Optional This field is required only if the activity date and time isn't specified in the request.	59.0

Name	Type	Description	Required or Optional	Available Version
lastName	String	Family name of the referred friend.	Optional Required only if the contact ID of the referred friend doesn't exist.	59.0
orderReferenceId	String	External purchase order ID. This field is applicable only when the event type is <code>Purchase</code> .	Optional	59.0
productId	String	ID of the product purchased by the referral. This field is applicable only when the event type is <code>Purchase</code> .	Optional	59.0
purchaseAmount	Double	Price of the product purchased by the referred friend. This field is applicable only when the event type is <code>Purchase</code> .	Optional	59.0
purchaseQuantity	Integer	Quantity purchased by the referred friend. This field is applicable only when the event type is <code>Purchase</code> .	Optional	59.0
referralAdditionalAttributes	Map<String, String>	Key value pairs for additional information about the referred friend.	Optional	59.0
referralCode	String	Referral code used by the referred friend to sign up or make a purchase. It's a combination of the referral code and promotion code in the format, <code>referralCode-promotionCode</code> .	Required	59.0
referralEmails	String[]	The email addresses of the referral friends.	Optional	59.0
transactionJournal AdditionalAttributes	Map<String, String>	Additional details of the transaction journal that is created for the event.	Optional	59.0
referralChannel	String	Channels such as email and social media that are used to refer a friend.	Optional	62.0
referralStage	String	The event type to consider based on the stage of the referral promotion.	Optional	62.0
referralPayJournalSubtype	String	The activity for which the referred members are rewarded.	Optional	62.0

Name	Type	Description	Required or Optional	Available Version
optInWhatsApp	Boolean	Indicates whether the new customer has opted in to receive WhatsApp messages from the company.	Optional	62.0
contactLocale	String	Locale for contact for WhatsApp distribution channel.	Optional	62.0
contactFieldForLocale	String	Contact field used for Locale WhatsApp distribution channel.	Optional	62.0

Response body for POST[Referral Event](#)**Referral Advocate Profile (POST)**

View the profile of a referral program advocate.

Resource`/referral-programs/advocate-profile`**Available version**

62.0

HTTP methods

POST

JSON example

```
{
  "contactId" : "0lm121212121ASD",
  "programName" : "0op121217777",
  "shouldGetReferralSummary" : "true",
  "shouldGetReferrals" : "true"
}
```

JSON example

```
{
  "memberId" : "0qw121212121AQD",
  "promotionId" : "0gh123238467AJH"
}
```

JSON example

```
{
  "membershipNumber" : "mem1",
  "programName" : "RP1"
}
```

JSON example

```
{
  "membershipNumber" : "mem1",
  "programId" : "0opqwqwqwq1212AFG",
  "promotionCode" : "SMRBNZ"
}
```

JSON example

```
{
  "contactDetails" : {
    "email" : "aman.bindal@sf.com",
    "lastName" : "Bindal"
  },
  "promotionCode" : "SMRBNZ",
  "programName" : "0op121217777"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
contactDetails	Contact Details [] on page 143	The details of that are required to uniquely identify an advocate's Contact record.	Small, 62.0	62.0
contactId	String	The ID of the advocate's Contact record.	Small, 62.0	62.0
memberId	String	The ID of the advocate's Loyalty Program Member record.	Small, 62.0	62.0
membershipNumber	String	The unique referral program membership number of the advocate.	Small, 62.0	62.0
programId	String	The ID of the referral program that the advocate is a part of.	Small, 62.0	62.0
programName	String	The name of the referral program that the advocate is a part of.	Small, 62.0	62.0
promotionCode	String	The code of the promotion for which you want to view the advocate's referral details.	Small, 62.0	62.0
promotionId	String	The ID of the promotion for which you want to view the advocate's referral details.	Small, 62.0	62.0
shouldGetReferrals	Boolean	Indicates whether the response should contain the details of the advocates in progress and successful referrals.	Small, 62.0	62.0
shouldGetReferrals	Boolean	True, when you want detailed referral information of all your referrals from promotion if promotion ID is mentioned or program if promotion ID is not mentioned.	Small, 62.0	62.0

Response body for POST

[Referral Advocate Profile](#) on page 147

Request Bodies

Here's a list of Referral Marketing API request bodies.

[Redeem Voucher Input](#)

Input representation of the request to redeem a voucher for an advocate or their referred friend.

[Person Account Input](#)

Input representation of a advocate's person account details.

[Referral Event Input](#)

Input representation of the request to create a referral event.

[Referral Advocate Enrollment Input](#)

Input representation of the request to enroll an advocate to a referral promotion.

[Referral Advocate Profile Input](#)

Input representation for the Referral Advocate Profile API.

[Referral Advocate Contact Input](#)

Input representation for Referral Advocate contact details.

Redeem Voucher Input

Input representation of the request to redeem a voucher for an advocate or their referred friend.

JSON examples**JSON request to redeem a voucher for an advocate**

```
{
  "currencyIsoCode": "Yen",
  "programName": "ReferAFriend",
  "redemptionAmount": "12",
  "memberId": "01Mxx00000001grEAA"
}
```

JSON request to redeem a voucher for a referred friend

```
{
  "currencyIsoCode": "Yen",
  "programName": "ReferAFriend",
  "redemptionAmount": "10",
  "contactId": "003xx000004WkhEAAS"
}
```


Properties

Name	Type	Description	Required or Optional	Available Version
<code>contactId</code>	String	Contact ID of the referred friend for whom the voucher is redeemed.	Required only for a referral.	59.0
<code>currencyIsoCode</code>	String	Three-letter ISO 4217 currency code of the monetary currency in which the voucher must be redeemed.	Optional This field is required if your Salesforce org supports multiple currencies.	59.0
<code>memberId</code>	String	Loyalty Program Member ID of the advocate for whom the voucher is redeemed.	Required only for an advocate. This field is optional if you provide the membership number of the advocate.	59.0
<code>membershipNumber</code>	String	Unique number of the advocate for whom the voucher is redeemed.	Required only for an advocate. This field is optional if you provide the member ID of the advocate.	59.0
<code>programName</code>	String	Name of the referral program to which the voucher belongs.	Optional This field is required when you provide the membership number of the advocate.	59.0
<code>redemptionAmount</code>	Double	Amount to be redeemed. A value isn't required when you want to redeem the complete value of the voucher in a single transaction.	Optional	59.0

Person Account Input

Input representation of a advocate's person account details.

Properties

Name	Type	Description	Required or Optional	Available Version
additionalPersonAccountFieldValues	Map<String, String>	Custom fields for a person account in the form of API names and string values.	Optional	59.0
allowDuplicateRecords	Boolean	Indicates whether to allow creation of a duplicate person account if matching details are found (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code> .	Optional	59.0
email	String	Email of the advocate.	Required	59.0
firstName	String	First name of the advocate.	Required	59.0
lastName	String	Last name of the advocate.	Required	59.0

Referral Event Input

Input representation of the request to create a referral event.

JSON example

Here's an example of a payload for an event where the existing member refers his friend, Michael Clare.

```
{
  "referralCode": "2G11QW4G-PROMOCODE2809",
  "firstName": "Michael",
  "lastName": "Clare",
  "email": "mclare@salesforce.com",
  "activityDateTime": "2023-09-13T00:00:00",
  "eventType": "Refer",
  "referredPartyJournalSubtype": "Sample Activity",
  "referralAdditionalAttributes": {
    "attributes": {
      "phoneNumber": "1234567890",
      "emailOptOut": true
    }
  }
}
```

Here's an example of a payload to know which channel did the referral come from.

```
{
  "referralCode": "2G11QW4G-PROMOCODE2809",
  "contactId": "003xx000004WkhEAAS",
  "firstName": "Michael",
  "lastName": "Clare",
  "email": "michael.clare@salesforce.com",
  "joiningDate": "2021-04-13T00:00:00",
  "eventType": "Purchase",
  "referralChannel": "Facebook",
  "purchaseAmount": 40000,
  "purchaseQuantity": 34,
  "referralAdditionalAttributes" : {
```

```

"attributes": {
  "phoneNumber": "1234567890",
  "PersonHasOptedOutOfEmail": false,
},
"transactionJournalAdditionalAttributes": {
},
"orderReferenceId": "003xx00000000fxEAA"
}

```

Here's an example of a payload for an event where Michael Clare signs up for the referral program.

```

{
  "referralCode": "2G11QW4G-PROMOCODE2809",
  "contactId": "003xx000004WkhEAAS",
  "activityDateTime": "2023-09-13T00:00:00",
  "eventType": "Enrollment"
}

```

Here's an example of a payload for an event where Michael Clare purchases a product.

```

{
  "referralCode": "2G11QW4G-PROMOCODE2809",
  "contactId": "003xx000004WkhEAAS",
  "activityDateTime": "2023-09-13T00:00:00",
  "referralStage": "Purchase",
  "productId": "01txx0000006iGyAAI",
  "purchaseAmount": 40000,
  "purchaseQuantity": 34,
  "referralAdditionalAttributes": {
    "attributes": {
      "phoneNumber": "1234567890",
      "emailOptOut": true
    }
  },
  "transactionJournalAdditionalAttributes": {
  }
}

```

Here's an example of a payload for an event where the existing member refers multiple friends.

```

{
  "referralCode": "0UGUXMNA-promotiontest098",
  "referralEmails": {
    "emails": [
      "kit.ryan@salesforce.com",
      "amy.sh@salesforce.com"
    ]
  },
  "activityDateTime": "2024-02-12T00:00:00",
  "eventType": "Refer",
  "referralAdditionalAttributes": {
    "attributes": {
    }
  }
}

```

```

    },
    "transactionJournalAdditionalAttributes":{
    }
  }
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
activityDateTime	String	The date and time when the referral event took place.	Optional This field is required only if the joining date isn't specified in the request.	59.0
contactId	String	Contact ID of the referred friend.	Optional Required if the referral record exists.	59.0
email	String	Email address of the referred friend.	Optional Required only if the contact ID of the referred friend doesn't exist.	59.0
eventType	String	Type of event completed by the referred friend or advocate. Possible values are: <ul style="list-style-type: none"> Enrollment Purchase Refer 	Required	59.0
firstName	String	First name of the referred friend.	Optional Required only if the contact ID of the referred friend doesn't exist.	59.0
joiningDate	String	Date the referred friend joined as a new customer. This field has been deprecated. In API version 59.0 and later, use the new <code>activityDateTime</code> field.	Optional This field is required only if the activity date and time isn't specified in the request.	59.0

Name	Type	Description	Required or Optional	Available Version
lastName	String	Family name of the referred friend.	Optional Required only if the contact ID of the referred friend doesn't exist.	59.0
orderReferenceId	String	External purchase order ID. This field is applicable only when the event type is <code>Purchase</code> .	Optional	59.0
productId	String	ID of the product purchased by the referral. This field is applicable only when the event type is <code>Purchase</code> .	Optional	59.0
purchaseAmount	Double	Price of the product purchased by the referred friend. This field is applicable only when the event type is <code>Purchase</code> .	Optional	59.0
purchaseQuantity	Integer	Quantity purchased by the referred friend. This field is applicable only when the event type is <code>Purchase</code> .	Optional	59.0
referralAdditionalAttributes	Map<String, String>	Key value pairs for additional information about the referred friend.	Optional	59.0
referralCode	String	Referral code used by the referred friend to sign up or make a purchase. It's a combination of the referral code and promotion code in the format, <code>referralCode-promotionCode</code> .	Required	59.0
referralEmails	String[]	The email addresses of the referral friends.	Optional	59.0
transactionJournalAdditionalAttributes	Map<String, String>	Additional details of the transaction journal that is created for the event.	Optional	59.0
referralChannel	String	Channels such as email and social media that are used to refer a friend.	Optional	62.0
referralStage	String	The event type to consider based on the stage of the referral promotion.	Optional	62.0
referredPartyJournalSubtype	String	The activity for which the referred members are rewarded.	Optional	62.0

Name	Type	Description	Required or Optional	Available Version
optInWhatsApp	Boolean	Indicates whether the new customer has opted in to receive WhatsApp messages from the company.	Optional	62.0
contactLocale	String	Locale for contact for WhatsApp distribution channel.	Optional	62.0
contactFieldForLocale	String	Contact field used for Locale WhatsApp distribution channel.	Optional	62.0

Referral Advocate Enrollment Input

Input representation of the request to enroll an advocate to a referral promotion.

Root XML tag

```
referralMemberEnrollmentInput
```

JSON examples to enroll an existing referral program advocate to a promotion

```
{
  "membershipNumber": "M125"
}
```

```
{
  "contactId": "003xx000004Wsxc"
}
```

```
{
  "associatedPersonAccountDetails": {
    "firstName": "Mac",
    "lastName": "Ray",
    "email": "mray@salesforce.com",
    "allowDuplicateRecords": "false",
    "additionalPersonAccountFieldValues": {
      "attributes": {
        "country__c": "US"
      }
    }
  },
  "memberStatus": "Active",
  "transactionJournalStatementFrequency": "Monthly",
  "transactionJournalStatementMethod": "Mail",
  "enrollmentChannel": "Email",
  "additionalMemberFieldValues": {
    "attributes": {
      "state__c": "California"
    }
  }
}
```

JSON example to enroll a new customer as an advocate of a promotion

```
{
  "membershipNumber": "M125",
  "associatedPersonAccountDetails": {
    "firstName": "Mac",
    "lastName": "Ray",
    "email": "mray@salesforce.com",
    "allowDuplicateRecords": "false",
    "additionalPersonAccountFieldValues": {
      "attributes": {
        "country__c": "US"
      }
    }
  },
  "memberStatus": "Active",
  "transactionJournalStatementFrequency": "Monthly",
  "transactionJournalStatementMethod": "Mail",
  "enrollmentChannel": "Email",
  "additionalMemberFieldValues": {
    "attributes": {
      "state__c": "California"
    }
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
additionalMemberFieldValues	Map<String, String>	Custom field values of the advocate.	Optional	59.0
additionalPersonAccountFieldValues	Map<String, String>	Custom field values from the advocate's person account.	Optional	59.0
associatedPersonAccountDetails	Person Account Input	Details of the advocate's person account.	Optional This field is required only if you don't have the contact ID or the membership number of the advocate.	59.0
contactId	String	Contact ID of the advocate to enroll to the referral promotion.	Optional This field is required only if you don't have the person account details or the membership number of the advocate.	59.0

Name	Type	Description	Required or Optional	Available Version
enrollmentChannel	String	Channel that the advocate has used to join the referral program. Possible values are: <ul style="list-style-type: none"> • CallCenter • Email • Franchise • Mobile • Partner • Pos • Print • Social • Store • Web 	Optional	59.0
memberStatus	String	Status of the new advocate after enrollment. Possible values are: <ul style="list-style-type: none"> • Active • Inactive • Custom value - Any value you define in your org. For example, if an advocate must be evaluated before confirming enrollment, you can create a status called <code>On Hold</code> and assign it to this field. The default value is <code>Active</code> .	Optional This field is required for enrolling a new advocate.	59.0
membershipEndDate	String	Date the advocate's referral program membership ends.	Optional	59.0
membershipNumber	String	Unique membership number of the advocate.	Optional This field is required only if you don't have the person account details or the contact ID of the advocate.	59.0
shouldProcessTransactionsInRealTime	Boolean	Indicates whether the transaction journals created by the API are processed as soon as they're created (<code>true</code>) or not (<code>false</code>). The default value is <code>true</code> .	Optional	59.0

Name	Type	Description	Required or Optional	Available Version
transactionJournalStatementFrequency	String	Frequency at which transaction statements must be generated for the advocate. Possible values are: <ul style="list-style-type: none"> Monthly Quarterly 	Optional	59.0
transactionJournalStatementMethod	String	Preferred method of receiving transaction journal statements. Possible values are: <ul style="list-style-type: none"> Email Mail 	Optional	59.0
isAutoEnrolled	Boolean	Indicates whether member is auto-enrolled for referral promotion (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code> .	Optional	64.0
isEnrollmentActive	Boolean	Indicates if the member is enrolled for the referral promotion (<code>true</code>) or not (<code>false</code>). The default value is <code>true</code> .	Optional	64.0

Referral Advocate Profile Input

Input representation for the Referral Advocate Profile API.

JSON example

```
{
  "contactId" : "0lm1212121ASD",
  "programName" : "0op121217777",
  "shouldGetReferralSummary" : "true",
  "shouldGetReferrals" : "true"
}
```

JSON example

```
{
  "memberId" : "0qw1212121AQD",
  "promotionId" : "0gh123238467AJH"
}
```

JSON example

```
{
  "membershipNumber" : "mem1",
  "programName" : "RP1"
}
```

JSON example

```
{
  "membershipNumber" : "mem1",
  "programId" : "0opqwqwqwq1212AFG",
  "promotionCode" : "SMRBNZ"
}
```

JSON example

```
{
  "contactDetails" : {
    "email" : "aman.bindal@sf.com",
    "lastName" : "Bindal"
  },
  "promotionCode" : "SMRBNZ",
  "programName" : "0op121217777"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
contactDetails	Contact Details [] on page 143	The details of that are required to uniquely identify an advocate's Contact record.	Small, 62.0	62.0
contactId	String	The ID of the advocate's Contact record.	Small, 62.0	62.0
memberId	String	The ID of the advocate's Loyalty Program Member record.	Small, 62.0	62.0
membershipNumber	String	The unique referral program membership number of the advocate.	Small, 62.0	62.0
programId	String	The ID of the referral program that the advocate is a part of.	Small, 62.0	62.0
programName	String	The name of the referral program that the advocate is a part of.	Small, 62.0	62.0
promotionCode	String	The code of the promotion for which you want to view the advocate's referral details.	Small, 62.0	62.0
promotionId	String	The ID of the promotion for which you want to view the advocate's referral details.	Small, 62.0	62.0
shouldGetReferrals	Boolean	Indicates whether the response should contain the details of the advocates in progress and successful referrals.	Small, 62.0	62.0
shouldGetReferrals	Boolean	True, when you want detailed referral information of all your referrals from promotion if promotion ID is mentioned or program if promotion ID is not mentioned.	Small, 62.0	62.0

Referral Advocate Contact Input

Input representation for Referral Advocate contact details.

Properties

Name	Type	Description	Required or Optional	Available Version
email	String	The email that's saved in the advocate's Contact record.	Small, 62.0	62.0
firstName	String	The first name that's saved in the advocate's Contact record.	Small, 62.0	62.0
lastName	String	The last name that's saved in the advocate's Contact record.	Small, 62.0	62.0
phoneNumber	String	The phone number that's saved in the advocate's Contact record.	Small, 62.0	62.0

Response Bodies

Here's a list of Referral Marketing API response bodies.

[Redeem Voucher](#)

Output representation of the details of a redeemed voucher.

[Advocate Enrollment Transaction Journal](#)

Output representation of the details of a transaction journal created for the enrolled referral program advocate.

[Referral Event](#)

Output representation of the request to create a referral event record.

[Referral Advocate Enrollment](#)

Output representation of the request to create a referral program advocate.

[Referral Advocate Profile](#)

Represents the output for Referral Advocate Profile API.

[Referral Promotion](#)

Represents the output for Referral Promotion.

[Referral Statistics](#)

Represents the response for Referral Statistics.

[Referral Info](#)

Represents the response for list of referrals.

Redeem Voucher

Output representation of the details of a redeemed voucher.

JSON example

```
{
  "currencyIsoCode": "Yen",
  "remainingAmount": "10.0"
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
currencyIsoCode	String	Three-letter ISO 4217 currency code of the monetary currency of the voucher's remaining amount.	Small, 59.0	59.0
remainingAmount	Double	Amount remaining after partial redemption. If the complete value of the voucher is redeemed, the remaining amount is zero.	Small, 59.0	59.0

Advocate Enrollment Transaction Journal

Output representation of the details of a transaction journal created for the enrolled referral program advocate.

Property Name	Type	Description	Filter Group and Version	Available Version
activityDate	String	Activity date of the transaction journal.	Small, 59.0	59.0
journalSubType	String	Journal subtype of the transaction journal.	Small, 59.0	59.0
journalType	String	Journal type of the transaction journal.	Small, 59.0	59.0
membershipNumber	String	Membership number of the advocate associated with the transaction journal.	Small, 59.0	59.0
programName	String	Name of the referral program associated with the transaction journal.	Small, 59.0	59.0
status	String	Status of the transaction journal. Possible values are: <ul style="list-style-type: none"> • Canceled • Error • Pending • Processed 	Small, 59.0	59.0
transactionJournalId	String	ID of the transaction journal.	Small, 59.0	59.0

Referral Event

Output representation of the request to create a referral event record.

JSON example

```
{
  "contactIds": [
    "0031Q00002kCusB"
  ],
  "referralIds": [
    "0wilQ0000001jna"
  ],
  "referralStage": "Friend Completes First Purchase",
  "transactionJournalIds": [
    "01V1Q0000019gJg",
    "01V1Q0000019gJh"
  ],
  "voucherId": "0kD1Q000000keXVUAY",
  "voucherList": [
    {
      "effectiveDate": "2024-06-14",
      "expirationDate": "2025-04-14",
      "transactionJournalId": "01V1Q0000019gJg",
      "voucherCode": "SW504FF7",
      "voucherDefinition": "Voucher2",
      "voucherId": "0kD1Q000000keXVUAY"
    },
    {
      "effectiveDate": "2024-06-14",
      "expirationDate": "2025-04-14",
      "transactionJournalId": "01V1Q0000019gJh",
      "voucherCode": "IKWX6D5D",
      "voucherDefinition": "Voucher2",
      "voucherId": "0kDxx0000000210EAA"
    }
  ]
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
contactIds	String[]	IDs of the contact records created or used to identify the referred friends.	Small, 59.0	59.0
referralIds	String[]	IDs of the referral records created or used to identify the referrals.	Small, 59.0	59.0
referralStage	String	Promotion stage to which the referral belongs.	Small, 59.0	59.0
transactionJournalIds	String[]	IDs of the transaction journal records created for the events.	Small, 59.0	59.0
voucherId	String	ID of the voucher belonging to the referred friend.	Small, 59.0	59.0
voucherList	String[]	The details of the voucher records that is created for the referral event.	Small, 62.0	62.0

Referral Advocate Enrollment

Output representation of the request to create a referral program advocate.

JSON example

```
{
  "contactId": "003R0000003vJeU",
  "memberId": "01MRO0000000nO",
  "membershipNumber": "DemoJun21",
  "programName": "DemoProgram",
  "promotionReferralCode": "zB74ANSO-DemoPromo1",
  "transactionJournals": [
    {
      "activityDate": "2023-06-21T13:37:26.000Z",
      "journalSubType": "Member Enrollment",
      "journalType": "Referral",
      "membershipNumber": "DemoJun21",
      "programName": "DemoProgram",
      "status": "Processed",
      "transactionJournalId": "01VRO00000002wV"
    }
  ]
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
contactId	String	ID of the contact that's created for the advocate.	Small, 59.0	59.0
memberId	String	ID of the Loyalty Program Member record created for the advocate.	Small, 59.0	59.0
membershipNumber	String	Membership number of the advocate.	Small, 59.0	59.0
programName	String	Name of the referral program in which the advocate is enrolled.	Small, 59.0	59.0
promotionReferralCode	String	<p>Promotion referral code used by the advocate to join the referral program.</p> <p>The promotion referral code consists of the promotion code with which the referral member enrolls and the referral code that's used to join the referral program. A hyphen separates the promotion code and the referral code. For example, if the referral code is ABC and the promotion code is 123, then the promotion referral code is ABC-123.</p>	Small, 59.0	59.0
transactionJournals	Advocate Enrollment Transaction Journal	List of transaction journals that are created for the advocate's enrollment.	Small, 59.0	59.0

Referral Advocate Profile

Represents the output for Referral Advocate Profile API.

JSON Example

```
{
  "enrolledPromotionsList" : [
    {
      "programId": "01x1234567ABC",
      "programName": "RP1",
      "memberId" : "0qw121212121ASD",
      "membershipNumber" : "mem1",
      "promotionName" : "Summer bonanza",
      "promotionCode" : "SMRBNZ",
      "promotionDescription" : "This is a summer promo",
      "promotionId" : "0op84848484848ASD",
      "promotionStartDate" : "2024-01-03T00:00:00",
      "promotionEndDate" : "2025-01-04T00:00:00",
      "promotionPageUrl" : "https://www.nike.com",
      "promotionImageUrl" : "https://www.nike.com/098wqwqwq-898q9ww",
      "isMemberPromotionEnrollementActive" : true,
      "memberReferralCode" : "GTRFDSX09",
      "memberReferralUrl" : "https://www.nike.com/GTRFDSX09-SMRBNZ",
      "memberPromotionSummary" : {
        "referralCount" : 6,
        "referralsOnStageFourCount" : 2,
        "referralsOnStageFiveCount", 1,
        "vouchersIssuedCount" : 3
      }
    }
  ],
  "eligiblePromotionsList" : [
    {
      "programId": "01x1234567ABC",
      "programName": "RP1",
      "memberId" : "0qw121212121ASD",
      "membershipNumber" : "mem1",
      "promotionName" : "Winter bonanza",
      "promotionCode" : "WNTRBNZ",
      "promotionDescription" : "This is a winter promo",
      "promotionId" : "0op8484848467ASF",
      "promotionStartDate" : "2024-01-03T00:00:00",
      "promotionEndDate" : "2025-01-04T00:00:00",
      "promotionPageUrl" : "https://www.adidas.com",
      "promotionImageUrl" : "https://www.adidas.com/098wqwqwq-898q9ww",
      "isMemberPromotionEnrollementActive" : false
    }
  ],
  "programSummary" : {
    "referralCount" : 14,
    "referralsOnStageFourCount" : 6,
    "referralsOnStageFiveCount", 3,
  }
}
```

```
      "vouchersIssuedCount" : 8
    },
    "referralSummaryList" : [
      {
        "referredPartyName":"Michael Clare",
        "referralId":"01x567687878GVBH",
        "promotionId":"0opujh343jdbCGVF",
        "promotionName":"Summer Bonanza",
        "referralLastModifiedDate":"2024-06-17T00:00:00",
        "promotionStageName":"Advocate Refers Friend",
        "contactId" : "0c300000000000001A",
        "referralCreationDate" : "2024-06-12T00:00:00"
      }
    ]
  }
}
```

Table 1: Properties

Property Name	Type	Description	Filter Group and Version	Available Version
eligiblePromotionList	Referral Promotion []	The list of promotions that the advocate is eligible for.	Small, 62.0	62.0
enrolledPromotionList	Referral Promotion [] on page 148	The list of promotions that the advocate is enrolled in.	Small, 62.0	62.0
programSummary	Referral Statistics [] on page 149	referral statistics in thw whole program for advocate	Small, 62.0	62.0
referralSummaryList	Referral Info [] on page 150	The list of referrals that the advocate has submitted.	Small, 62.0	62.0

Referral Promotion

Represents the output for Referral Promotion.

Property Name	Type	Description	Filter Group and Version	Available Version
isPromotionEnrollmentActive	Boolean	Indicates whether the advocate's enrollment in the referral promotion active.	Small, 62.0	62.0
memberId	String	The ID of the advocate's Loyalty Program Member record.	Small, 62.0	62.0
memberPromotionSummary	Referral Statistics []	The details of the referrals that the advocate has submitted for the promotion.	Small, 62.0	62.0
memberReferralCode	String	The referral code of the advocate.	Small, 62.0	62.0
memberReferralUrl	URL	The referral URL of the advocate.	Small, 62.0	62.0

Property Name	Type	Description	Filter Group and Version	Available Version
membershipNumber	String	The unique referral program membership number of the advocate.	Small, 62.0	62.0
programId	String	The ID of the referral promotion that the advocate is enrolled in.	Small, 62.0	62.0
programName	String	The name of the referral promotion that the advocate is a part of.	Small, 62.0	62.0
promotionCode	String	The unique code of the referral promotion that the advocate is enrolled in.	Small, 62.0	62.0
promotionDescription	String	The description of the referral promotion that the advocate is enrolled in.	Small, 62.0	62.0
promotionEndDate	Date	The end date of the referral promotion that the advocate is enrolled in.	Small, 62.0	62.0
promotionId	String	The ID of the referral promotion that the advocate is enrolled in.	Small, 62.0	62.0
promotionImageUrl	URL	The image URL of the referral promotion that the advocate is enrolled in.	Small, 62.0	62.0
promotionName	String	The name of the referral promotion that the advocate is enrolled in.	Small, 62.0	62.0
promotionPageUrl	URL	The promotion page URL of the referral promotion that the advocate is enrolled in.	Small, 62.0	62.0
promotionStartDate	Date	The start date of the referral promotion that the advocate is enrolled in.	Small, 62.0	62.0

Referral Statistics

Represents the response for Referral Statistics.

Property Name	Type	Description	Filter Group and Version	Available Version
referralCount	Integer	The count of referrals that the advocate has submitted till date.	Small, 62.0	62.0
referralStageFiveCount	Integer	The count of advocate referrals that are in stage five of the promotion.	Small, 62.0	62.0
referralStageFourCount	Integer	The count of advocate referrals that are in stage four of the promotion.	Small, 62.0	62.0
voucherIssuedCount	Integer	The count of vouchers issued to the advocate by the promotion.	Small, 62.0	62.0

Referral Info

Represents the response for list of referrals.

Property Name	Type	Description	Filter Group and Version	Available Version
promotionId	String	ID of the promotion.	Small, 62.0	62.0
promotionName	String	Name of the promotion	Small, 62.0	62.0
promotionStageName	String	The current promotion stage of the referral.	Small, 62.0	62.0
referralCreationDate	String	The date on which the current promotion stage was created.	Small, 62.0	62.0
referralId	String	ID of the referral.	Small, 62.0	62.0
referralLastModifiedDate	Date	The date when the referral record was last modified.	Small, 62.0	62.0
referredPartyContactId	String	ID of the contact that belongs to the referred party.	Small, 62.0	62.0
referredPartyName	String	Name of the referred party.	Small, 62.0	62.0

CHAPTER 6 Referral Marketing Standard Invocable Actions

In this chapter ...

- [Create Referral Event](#)

Create and manage referral programs for your organization using invocable actions.. For more information on standard invocable actions, see [REST API Developer Guide](#) and [Actions Developer Guide](#).

Create Referral Event

Create referral event records when an advocate refers a friend, or when referred friends sign up or make a purchase.

This action is available in API version 60.0 and later for users with the Referral Marketing license.

Supported REST HTTP Methods

URI

/services/data/v`XX.X`/actions/standard/processReferralEvent

Formats

JSON

HTTP Methods

POST

Authentication

Authorization: Bearer *token*

Inputs

Input	Details
activityDateTime	Type DateTime Description Required. The date and time when the referral event took place.
eventType	Type String Description Required. The type of event that the referral completed. Possible values are: <ul style="list-style-type: none">ReferEnrollmentPurchase
externalReferenceNumber	Type String Description The number generated by an external system for the referral event.
referralCode	Type String

Input	Details
	Description Required. The referral code used by a referral to sign up as a customer, or to make a purchase. The referral code is a combination of the advocate's referral code and the promotion code separated by a hyphen.
referralContactId	Type String Description The contact ID of the referral who signed up to be a customer, or to make a purchase.
referralEmail	Type String Description The email address of the referral who has signed up to be a customer, or to make a purchase.
referralFirstName	Type String Description The first name of the referral who signed up to be a customer, or to make a purchase.
referralLastName	Type String Description The last name of the referral who signed up to be a customer, or to make a purchase.
productId	Type String Description The ID of the product that the referral purchased.
purchaseAmount	Type String Description The amount the referral spent to purchase one or more units of a product.
purchaseQuantity	Type String Description The number of units that the referral purchased of a product.

Outputs

Output	Details
contactId	<p>Type String</p> <p>Description The ID of the contact record that's either created for the referral or that uniquely identifies the referral.</p>
referralId	<p>Type String</p> <p>Description The ID of the referral record of the person who was referred, or whose referral event is processed.</p>
referralStage	<p>Type String</p> <p>Description The current stage of the referral promotion for a referral. Possible values are:</p> <ul style="list-style-type: none"> Promotion Launched Advocate Joins Promotion Advocate Refers Friend Friend Signs Up Friend Completes First Purchase
transactionJournalIds	<p>Type String</p> <p>Description The comma separate list of transaction journal IDs created to process the referral event.</p>
voucherId	<p>Type String</p> <p>Description The ID of the voucher issued to either the referral signing up or to the advocate after the referral completes a purchase.</p>

Example

Sample Request

```
{
  "inputs": [
    {
      "referralCode": "referralCode-promotionCode",
```

```

    "referralContactId":"003xx000004WkhEAAS",
    "referralFirstName":"Michael",
    "referralLastName":"Clare",
    "referralEmail":"mclare@salesforce.com",
    "activityDateTime":"2021-04-13T00:00:00",
    "eventType":"Purchase",
    "productId":"01txx0000006iGyAAI",
    "purchaseAmount":40000,
    "purchaseQuantity":34,
    "externalReferenceNumber":"003xx00000000fxEAA"
  }
]
}

```

Sample Response

```

[
  {
    "actionName":"processReferralEvent",
    "errors":null,
    "isSuccess":true,
    "outputValues":{
      "contactId":"003RM00000809ZT",
      "transactionJournalIds":[
        "01VRM0000002qtT",
        "01VRM0000002qtU"
      ],
      "referralId":"0wiRM0000004CPf",
      "referralStage":"Friend Completes First Purchase",
      "voucherId":"0kDRM0000004DZl2AM"
    },
    "version":1
  }
]

```

CHAPTER 7 Referral Marketing Metadata API Types

In this chapter ...

- [CommunicationChannelType](#)
- [Flow for Referral Marketing](#)
- [IndieReferralMarketingSettings](#)
- [LoyaltyProgramSetup](#)

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](#).

CommunicationChannelType

Represents the channel type, such as WhatsApp or Telegram that's used for communication.



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

CommunicationChannelType components have the suffix `.communicationChannelType` and are stored in the `communicationChannelTypes` folder.

Version

CommunicationChannelType components are available in API version 63.0 and later.

Special Access Rules

To use this metadata type, your org must have at least one of these features enabled:

- Industries Offer Management
- Industries Referral Marketing

Fields

Field Name	Description
<code>channelName</code>	Field Type string Description Required. Name of the channel that's used for communication, such as WhatsApp or Telegram.
<code>masterLabel</code>	Field Type string Description Required. A user-friendly name for communication channel type, which is defined when the communication channel type is created.

Declarative Metadata Sample Definition

The following is an example of a `CommunicationChannelType` component.

```
<?xml version="1.0" encoding="UTF-8"?>
<CommunicationChannelType xmlns="http://soap.sforce.com/2006/04/metadata">
  <masterLabel>Test1</masterLabel>
  <channelName>WhatsApp</channelName>
</CommunicationChannelType>
```

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>CommunicationChannelType</name>
  </types>
  <version>64.0</version>
</Package>
```

Wildcard Support in the Manifest File

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

Flow for Referral Marketing

Represents the metadata associated with a flow. With Flow, you can create an application that navigates users through a series of screens to query and update records in the database. You can also execute logic and provide branching capability based on user input to build dynamic applications.

FlowActionCall

Referral Marketing exposes additional `actionType` values for the `FlowActionCall` Metadata type. For more information on Flow and `FlowActionCall` metadata type, see [Flow](#).

Field Name	Field Type	Description
<code>actionType</code>	<code>InvokableActionType</code> (enumeration of type string)	Required. The action type. Additional valid values only for Referral Marketing include: <ul style="list-style-type: none"> <code>processReferralEvent</code>—Create referral event records when an advocate refers a friend, or when referred friends sign up or make a purchase. This value is available in API version 60.0 and later.

IndustriesReferralMarketingSettings

Represents the settings to enable capabilities of Referral Marketing.

In the package manifest, all organization settings metadata types are accessed using the Settings name. See Settings for more details.

Parent Type

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

File Suffix and Directory Location

IndustriesReferralMarketingSettings values are stored in a single file named `IndustriesReferralMarketing.settings` in the `settings` folder. The `.settings` files are different from other named components because there's only one settings file for each settings component.

Version

IndustriesReferralMarketingSettings components are available in API version 59.0 and later.

Fields

Field Name	Field Type	Description
<code>enableMarketingCloudIntegration</code>	boolean	Indicates whether the capability to integrate Referral Marketing with Marketing Cloud is enabled (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code> . This field is available in API version 59.0 and later.



Tip: To enable the capability that uses Data Cloud data graphs to query for Data Cloud segments that customers belong to, see the `enableSegmentQueryByDataGraph` field of the [IndustriesLoyaltySettings metadata type](#) in the Loyalty Management Developer Guide.

Declarative Metadata Sample Definition

The following is an example of a IndustriesReferralMarketingSettings component.

```
<?xml version="1.0" encoding="UTF-8"?>
<IndustriesReferralMarketingSettings
  xmlns="http://soap.sforce.com/2006/04/metadata">
  <enableMarketingCloudIntegration>false</enableMarketingCloudIntegration>
</IndustriesReferralMarketing>
```

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>IndustriesReferralMarketing</members>
    <name>Settings</name>
  </types>
```

```
<version>59.0</version>
</Package>
```

Wildcard Support in the Manifest File

The wildcard character * (asterisk) in the `package.xml` manifest file doesn't apply to metadata types for feature settings. The wildcard applies only when retrieving all settings, not for an individual setting. For details, see [Settings](#). For information about using the manifest file, see [Deploying and Retrieving Metadata with the Zip File](#).

LoyaltyProgramSetup

Represents the configuration of a loyalty program process including its parameters and rules. Program processes determine how new transaction journals are processed. When new transaction journals meet the criteria and conditions for a program process, actions that are set up in the process are triggered for the transaction journals.



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

LoyaltyProgramSetup components have the suffix `loyaltyProgramSetup` and are stored in the `loyaltyProgramSetups` folder.

Version

LoyaltyProgramSetup components are available in API version 54.0 and later for Loyalty Management and in API version 59.0 and later for Referral Marketing.

Special Access Rules

To use this metadata type, your org must have either B2C - Loyalty, B2C - Loyalty Plus, Loyalty Management - Growth, Loyalty Management - Advanced, or Referral Marketing license enabled.

Fields

Field Name	Description
label	Field Type string


Field Name	Description
	Description Name of the loyalty program that the program process is associated with. If a loyalty program or referral program with the specified name doesn't exist, a new LoyaltyProgram record is created. The name of a program must contain at least one alphanumeric character.
programProcesses	Field Type LoyaltyProgramProcess[] on page 161 Description Collection of loyalty program processes associated with a loyalty program or a referral program.

LoyaltyProgramProcess

Represents a collection of fields relating to a loyalty program process.

Field Name	Description
description	Field Type string Description The description of the loyalty program process.
executionType	Field Type LoyaltyPgmProcExecutionType (enumeration of type string) Description The mode of processing transaction journals by the loyalty program process. Possible values are: <ul style="list-style-type: none"> Batch BatchAndRealTime RealTime
journalSubType	Field Type string Description The subtype of transaction journals processed by the loyalty program process.
journalType	Field Type string Description The type of transaction journal processed by the loyalty program process.

Field Name	Description
	<p>Possible values for loyalty program:</p> <ul style="list-style-type: none"> • Accrual • Redemption <p>Possible value for referral program:</p> <ul style="list-style-type: none"> • Referral
loyaltyTierGroup	<p>Field Type string</p> <p>Description The tier group of a loyalty program. This field is available in API version 56.0 and later. This field isn't applicable for referral programs.</p>
parameters	<p>Field Type LoyaltyProgramProcessParameter[] on page 163</p> <p>Description The parameters associated with the loyalty program process.</p>
processName	<p>Field Type string</p> <p>Description Required. The name of the loyalty program process.</p>
processType	<p>Field Type string</p> <p>Description Required. The type of records processed by the loyalty program process. For referral programs, the process type is <code>TransactionJournal</code>.</p>
rules	<p>Field Type LoyaltyProgramProcessRule[] on page 167</p> <p>Description The rules associated with the loyalty program process.</p>
status	<p>Field Type LoyaltyPgmProcStatus (enumeration of type string)</p> <p>Description The status of the loyalty program process. Possible values are:</p>

Field Name	Description
	<ul style="list-style-type: none"> • Active • Draft • Inactive <p> Note: Only active program processes can process transaction journals.</p>

LoyaltyProgramProcessParameter

Represents a collection of fields relating to a parameter that's associated with the program process. Parameters are dynamic or fixed values that are used in rule. You can define the value of a parameter based on its type and data type.

Field Name	Description
condition	<p>Field Type LoyaltyProgramProcessCondition on page 165</p> <p>Description The filter condition that decides which records are stored in the parameter.</p>
dataType	<p>Field Type LoyaltyPgmProcParmDataType (enumeration of type string)</p> <p>Description The data type of the parameter. Determines the type of value that can be stored in the parameter.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Boolean • Date • DateTime • Numeric • Subject • Text
decimalPlaces	<p>Field Type int</p> <p>Description The number of decimal places supported by the parameter when it is of the type Variable and data type Numeric.</p>
description	<p>Field Type string</p> <p>Description The description of the parameter.</p>

Field Name	Description
isCollection	<p>Field Type boolean</p> <p>Description Indicates whether the parameter can store multiple values when it is of the type Variable.</p>
isInput	<p>Field Type boolean</p> <p>Description Indicates whether a parameter can be used as an input outside the loyalty program process.</p>
isOutput	<p>Field Type boolean</p> <p>Description Indicates whether a parameter can be used as an output outside the loyalty program process.</p>
objectName	<p>Field Type string</p> <p>Description Name of the object whose records are stored by the parameter when it is of the type Variable and data type sObject.</p>
parameterName	<p>Field Type string</p> <p>Description Required. The name of the parameter.</p>
parameterType	<p>Field Type LoyaltyPgmProcParmType (enumeration of type string)</p> <p>Description The type of value the parameter can store. Possible values are:</p> <ul style="list-style-type: none"> • Constant • Formula • Variable
value	<p>Field Type string</p>

Field Name	Description
	Description The value of the parameter when it is of the type Variable or Formula and isn't of the data type sObject.

LoyaltyProgramProcessCondition

Represents a collection of fields relating to a condition. Conditions filter records that parameters store or check whether child actions must be triggered for a transaction journal.

Field Name	Description
conditionCriteria	Field Type string Description Required. The criteria that determine when the condition is met by a record or by a transaction journal.
conditionFilterCriteria	Field Type LoyaltyProgramProcessConditionFilterCriteria[] on page 165 Description The filter criteria that determines which records or transaction journals are filtered.
conditionName	Field Type string Description Required. The name of the condition.

LoyaltyProgramProcessConditionFilterCriteria

Represents a collection of fields relating to a filter criteria that's part of a condition. Multiple filter criteria can be added for a condition. Filter criteria determine which records are filtered by related condition.

Field Name	Description
operator	Field Type LoyaltyPgmProcCondOperator (enumeration of type string) Description Required.

Field Name	Description
	<p>The operator of the filter criteria.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Contains • DoesNotContain • EndsWith • Equals • GreaterThan • GreaterThanOrEquals • IsNotNull • IsNull • LessThan • LessThanOrEquals • NotEquals • StartsWith
sequence	<p>Field Type int</p> <p>Description Required. The sequence number of the filter criteria within a condition.</p>
sourceFieldName	<p>Field Type string</p> <p>Description Required. The name of the field used in the filter criteria.</p>
value	<p>Field Type string</p> <p>Description The value of the filter criteria.</p>
valueType	<p>Field Type LoyaltyPgmProcCondType (enumeration of type string)</p> <p>Description Required. The type of value specified in the filter criteria. Possible values are:</p> <ul style="list-style-type: none"> • Formula

Field Name	Description
	<ul style="list-style-type: none">• Literal• Lookup• Parameter

LoyaltyProgramProcessRule

Represents a collection of fields relating to a rule. A rule consists of a set of conditions and actions.

Field Name	Description
actions	Field Type LoyaltyProgramProcessAction[] on page 168 Description The actions associated with the rule.
conditions	Field Type LoyaltyProgramProcessCondition[] on page 165 Description The conditions associated with the rule.
description	Field Type string Description The description of the rule.
endDate	Field Type date Description The date until which the rule processes transaction journals.
previousRule	Field Type string Description The rule that processes new transaction journals before the current rule. The current rule is triggered when the previous rule completes processing transaction journals.
promotion	Field Type string Description The promotion associated with the rule. When a promotion is associated with a rule, the start date, end date, and status of the promotion determines the corresponding fields of the rule.

Field Name	Description
ruleName	Field Type string Description Required. The name of the rule.
startDate	Field Type date Description The date from which the rule starts processing transaction journals.
status	Field Type LoyaltyPgmProcRuleStatus (enumeration of type string) Description The status of the rule. Possible values are: <ul style="list-style-type: none">• Active• Draft• Inactive
stepMappings	Field Type LoyaltyProgramProcessRuleStepMapping[] on page 173 Description The list of step mappings associated with rule.




LoyaltyProgramProcessAction

Represents a collection of fields relating to an action.

Field Name	Description
actionName	Field Type string Description Required. The name of the action.
actionParameters	Field Type LoyaltyProgramProcessActionParameter[] on page 172

Field Name	Description
	Description The parameters of the action.
actionType	Field Type LoyaltyPgmProcActionType (enumeration of type string) Description Required. The type of action. Possible values are: <ul style="list-style-type: none"> • These values are used in Loyalty Management: <ul style="list-style-type: none"> – AssignParameterValues—Assigns values to parameters. – AssignBadgeToMember—Assigns a badge to a loyalty program member. This value is available in API version 56.0 and later. – Crud—Creates or updates records in the target object. This value is available in API version 56.0 and later. – CheckMemberBadgeAssignment—Checks whether a badge is assigned to a loyalty program member. This value is available in API version 56.0 and later. – ChangeMemberTier—Changes the tier of a loyalty program member. This value is available in API version 56.0 and later. – CreditPoints—Credits points to the loyalty program member associated with the transaction journal that's processed by the rule. – DebitPoints—Debits points from the points balance of the loyalty program member associated with the transaction journal that's processed by the rule. – GetMemberAttributesValues—Gets the details of a loyalty program member's attribute value for the selected engagement attribute. This value is available in API version 55.0 and later. – GetMemberPointBalance—Gets the points balance of a loyalty program member. – GetMemberPromotions—Get promotions of a loyalty program member. This value is available in API version 56.0 and later. – GetMemberTier—Gets the tier details of a loyalty program member. – GetOutputsFromDecisionTable—Gets outputs provided by a decision table. This value is available in API version 56.0 and later. – IncreaseUsageForCumulativePromotion—Increases a loyalty program member's usage for a cumulative promotion. – IssueVoucher—Issues a voucher to the loyalty program member associated with the transaction journal that's processed by the rule.

Field Name	Description
	<ul style="list-style-type: none"> — RedeemVoucher—Redeems a voucher for the loyalty program member associated with the transaction journal that's processed by the rule. This value is available in API version 58.0 and later. — —Updates the loyalty program member's usage towards achieving a cumulative promotion by a specified value. — RunFlow—Runs a flow. — RunProgramProcess—Runs an active loyalty program process as a subprocess. This value is available in API version 56.0 and later. — SendMail—Sends emails to the loyalty program member for whom the process is run. This value is available in API version 59.0 and later. — UpdateCurrentValueForMemberAttribute—Updates the loyalty program member's current attribute value for the selected engagement attribute. This value is available in API version 55.0 and later. — UpdatePointBalance—Updates the points balance of the loyalty program member associated with the transaction journal that's processed by the rule. — UpdateUsageForCumulativePromotion—Updates a loyalty program member's usage for a cumulative promotion. <ul style="list-style-type: none"> • These values are used in Referral Marketing: <ul style="list-style-type: none"> — AssignParameterValues—Assigns values to parameters. — Crud—Creates or updates records in the target object. — GetMemberAttributesValues—Gets the details of an advocate's attribute value for the selected engagement attribute. — GetMemberPromotions—Gets the promotions of an advocate. — GetOutputsFromDecisionTable—Gets outputs provided by a decision table. — IssueExtendedReward—Issues an extended reward to an advocate or a referred friend. This value is available in API version 64.0 and later. — IssueVoucher—Issues a voucher to an advocate or a referred friend. — RedeemVoucher—Redeems a voucher for an advocate or a friend. — SendMail—Sends emails to a referral program's advocates and referrals. — UpdateCurrentValueForMemberAttribute—Updates an advocate's current attribute value for the selected engagement attribute. • These values are reserved for internal use: <ul style="list-style-type: none"> — GetCustomerPromotionAttrValue—This value is available in API version 64.0 and later. — UpdateCustomerPromotionAttrValue—This value is available in API version 64.0 and later.
crudActionType	Field Type LoyaltyPgmProcCrudActType (enumeration of type string)

Field Name	Description
	<p>Description</p> <p>The type of operation to perform on target object records by the action. This field is available from API version 56.0 and later.</p> <p> Note: This field is required when the <code>actionType</code> field value is <code>CRUD</code>.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • <code>create</code> • <code>update</code>
<code>decisionTable</code>	<p>Field Type</p> <p>string</p> <p>Description</p> <p>The decision that's invoked by the action for the transaction journal that's processed by the rule.</p>
<code>decisionTableDatasetLink</code>	<p>Field Type</p> <p>string</p> <p>Description</p> <p>The dataset link associated with the selected decision table.</p>
<code>entityApiName</code>	<p>Field Type</p> <p>string</p> <p>Description</p> <p>The API name of the target object. This field is available from API version 56.0 and later.</p> <p> Note: This field is required when the <code>actionType</code> field value is <code>CRUD</code>.</p>
<code>flowDefinition</code>	<p>Field Type</p> <p>string</p> <p>Description</p> <p>The flow that's run by the action for the transaction journal that's processed by the rule. The selected flow must be of the type <code>LoyaltyManagementFlow</code>.</p>
<code>loyaltyProgramProcess</code>	<p>Field Type</p> <p>string</p> <p>Description</p> <p>The subprogram processes that's run by the action. This field is available from API version 56.0 and later.</p> <p> Note: This field is required when the <code>actionType</code> field value is <code>RunProgramProcess</code>.</p>

LoyaltyProgramProcessActionParameter

Represents a collection of fields relating to an action parameter. A parameter is either an input or an output for the action. Input parameters store the values used by the action. Output parameters store the result of the action.

Field Name	Description
<code>operator</code>	<p>Field Type LoyaltyPgmProcActParamOper (enumeration of type string)</p> <p>Description The type of operator used in the action. This field is available in API version 56.0 and later.</p> <p>Possible value is:</p> <ul style="list-style-type: none">• <code>Equals</code>
<code>parameterName</code>	<p>Field Type string</p> <p>Description Required.</p> <p>The name of parameter. The parameter name must be the same as the input or the output field that's supported depending on the associated action's type.</p>
<code>sequenceNumber</code>	<p>Field Type int</p> <p>Description The sequence number of the parameter in the action. This field is available in API version 56.0 and later.</p>
<code>value</code>	<p>Field Type string</p> <p>Description Required.</p> <p>The value of the parameter.</p>
<code>valueType</code>	<p>Field Type LoyaltyPgmProcActParamType (enumeration of type string)</p> <p>Description The type of value to provide in the parameter. This field is available in API version 56.0 and later.</p> <p>Possible values are:</p> <ul style="list-style-type: none">• <code>Literal</code>—A constant value.• <code>Parameter</code>—A runtime value passed using a parameter.

LoyaltyProgramProcessRuleStepMapping

Represents a collection of fields relating to a step mapping. Map conditions with child actions or map an action without a parent step.

Field Name	Description
associatedStep	Field Type string Description Required. The action that's associated with the mapping.
parentStep	Field Type string Description The condition that contains one or more child actions.
sequence	Field Type int Description Required. The sequence number of the mapping within a rule.

Declarative Metadata Sample Definition

The following is an example of a LoyaltyProgramSetup component.

```
<?xml version="1.0" encoding="UTF-8"?>
<LoyaltyProgramSetup xmlns="http://soap.sforce.com/2006/04/metadata">
  <label>Cloud Kicks Inner Circle</label>
  <programProcesses>
    <executionType>RealTime</executionType>
    <parameters>
      <dataType>Numeric</dataType>
      <decimalPlaces>0</decimalPlaces>
      <isCollection>>false</isCollection>
      <isInput>>false</isInput>
      <isOutput>>false</isOutput>
      <parameterName>VoucherValue</parameterName>
      <parameterType>Constant</parameterType>
      <value>50</value>
    </parameters>
    <processName>Issue Vouchers</processName>
    <processType>Transaction Journal</processType>
    <rules>
      <actions>
        <actionName>Issue High Transaction Value Voucher</actionName>
```

```

    <actionParameters>
      <operator>Equals</operator>
      <parameterName>VoucherDefinitionName</parameterName>
      <sequenceNumber>1</sequenceNumber>
      <value>Voucher for High Value Transactions</value>
      <valueType>Literal</valueType>
    </actionParameters>
    <actionParameters>
      <operator>Equals</operator>
      <parameterName>VoucherCode</parameterName>
      <sequenceNumber>2</sequenceNumber>
      <value>{!TransactionJournal.Order.Id}</value>
    </actionParameters>
    <actionParameters>
      <operator>Equals</operator>
      <parameterName>VoucherEffectiveDate</parameterName>
      <sequenceNumber>3</sequenceNumber>
      <value>DATEVALUE(&quot;2021-11-21 00:00:00&quot;)</value>
    </actionParameters>
    <actionParameters>
      <operator>Equals</operator>
      <parameterName>VoucherExpirationDate</parameterName>
      <sequenceNumber>4</sequenceNumber>
      <value>DATEVALUE(&quot;2022-01-01 00:00:00&quot;)</value>
    </actionParameters>
    <actionParameters>
      <operator>Equals</operator>
      <parameterName>VoucherFaceValue</parameterName>
      <sequenceNumber>5</sequenceNumber>
      <value>{!VoucherValue}</value>
    </actionParameters>
    <actionType>IssueVoucher</actionType>
  </actions>
  <conditions>
    <conditionCriteria>1</conditionCriteria>
    <conditionFilterCriteria>
      <operator>GreaterThanOrEquals</operator>
      <sequence>1</sequence>
      <sourceFieldName>TransactionJournal.TransactionAmount</sourceFieldName>

      <value>100</value>
      <valueType>Literal</valueType>
    </conditionFilterCriteria>
    <conditionName>New Condition</conditionName>
    <conditionType>Condition</conditionType>
  </conditions>
  <endDate>2022-01-01</endDate>
  <ruleName>Issue Voucher for Transactions Above $100</ruleName>
  <startDate>2021-11-21</startDate>
  <status>Draft</status>
  <stepMappings>
    <associatedStep>New Condition</associatedStep>
    <sequence>1</sequence>
  </stepMappings>

```

```

        <stepMappings>
            <associatedStep>Issue High Transaction Value Voucher</associatedStep>
            <parentStep>New Condition</parentStep>
            <sequence>1</sequence>
        </stepMappings>
    </rules>
    <status>Draft</status>
</programProcesses>
</LoyaltyProgramSetup>

```

The following is an example `package.xml` that references the previous definition.

```

<?xml version="1.0" encoding="UTF-8"?>
<!--
    ~ Copyright 2020 Salesforce, Inc.
    ~ All Rights Reserved
    ~ Company Confidential
-->
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
    <types>
        <members>*</members>
        <name>LoyaltyProgramSetup</name>
    </types>
    <version>54.0</version>
</Package>

```



Note: To retrieve metadata specific to any loyalty program, mention the loyalty program name in the `<members>` tag. The generated file contains all the information regarding that loyalty program.

Wildcard Support in the Manifest File

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

CHAPTER 8 B2B Referral Management

In this chapter ...

- [B2B Referral Management Standard Invocable Actions](#)
- [B2B Referral Management Metadata API Types](#)

B2B Referral Management helps your brand run referral programs with evergreen and time-bound promotions for your channel partners. Channel managers can design and launch referral promotions within minutes. B2B Referral Management takes care of the rest with its inbuilt automations by rewarding advocates and their referred parties.

EDITIONS

Available in: Lightning Experience

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

B2B Referral Management Standard Invocable Actions

Create and manage B2B referral programs for your organization using invocable actions.

[Advocate Enrollment](#)

Enroll an existing or new customer as an advocate of a referral promotion.

[Referral Event](#)

Create referral event records when an advocate refers a friend, or when referred friends sign up or make a purchase.

Advocate Enrollment

Enroll an existing or new customer as an advocate of a referral promotion.

This action is available in API version 64.0 and later.

Supported REST HTTP Methods

URI

/services/data/vXX.X/actions/standard/enrollAdvocateB2bReferralProm

Formats

JSON

HTTP Methods

POST

Authentication

Authorization: Bearer Token

Inputs

Input	Details
programName	<div>TypeString</div> <div>DescriptionRequired. Loyalty program name associated with the promotion.</div>
promotionId	<div>TypeString</div> <div>DescriptionPromotion ID of the promotion. The account is enrolled as an advocate for this promotion.</div>
promotionCode	<div>TypeString</div> <div>DescriptionPromotion code used to enroll accounts as an advocate in this promotion.</div>

Input	Details
accountId	Type String Description Account ID of the account that is going to be enrolled as an advocate.
memberStatus	Type String Description Status of the new advocate after enrollment is completed.
membershipNumber	Type String Description Membership number of the account that is enrolled as a loyalty program member.
referralFirstName	Type String Description The first name of the referral who signed up to be a customer, or to make a purchase.
enrollmentChannel	Type String Description Channel used by the advocate to join the referral program.

Outputs

Output	Details
programName	Type String Description Required. Loyalty program name associated with the promotion.
promotionCode	Type String Description Promotion code used to enroll accounts as an advocate in this promotion.
memberId	Type String

Output	Details
	Description Promotion code used to enroll accounts as an advocate in this promotion.
accountId	Type String Description Account ID of the account that is going to be enrolled as an advocate.
membershipNumber	Type String Description Membership number of the account that is enrolled as a loyalty program member.
transactionJournalIds	Type String Description The comma separate list of transaction journal IDs created for target member enrollment.

Example

Sample Request

```
{
  "inputs": [
    {
      "programName": "demo",
      "promotionId": "0c8xx00000001NVAAY",
      "accountId": "001xx000003Ge63AAC"
    }
  ]
}
```

Sample Response

```
{
  "actionName": "enrollAdvocateB2bReferralProm",
  "errors": null,
  "invocationId": null,
  "isSuccess": true,
  "outcome": null,
  "outputValues": {
    "membershipNumber": "BTMADV1",
    "accountId": "001xx000003Ge63AAC",
    "programName": "RP01",
    "referralCode": "PN4SCF73-RPT01",
    "promotionCode": "RPT01",
  }
}
```

```
"transactionJournals": [  
  "01Vxx00000001SL"  
],  
"memberId": "01Mxx00000000Mb"  
},  
"sortOrder": -1,  
"version": 1  
}  
]
```

Referral Event

Create referral event records when an advocate refers a friend, or when referred friends sign up or make a purchase.

This action is available in API version 64.0 and later.

Supported REST HTTP Methods

URI

/services/data/vXX.X/actions/standard/processB2bReferralEvent

Formats

JSON

HTTP Methods

POST

Authentication

Authorization: Bearer Token

Inputs

Input	Details
eventType	<p>Type</p> <p>String</p> <p>Description</p> <p>Required. The type of event that the referral completed. Possible values are:</p> <ul style="list-style-type: none">• Refer• Enrollment• Purchase
referralCode	<p>Type</p> <p>String</p> <p>Description</p> <p>Required. The referral code used by a referral to sign up as a customer, or to make a purchase. The referral code is a combination of the advocate's referral code and the promotion code separated by a hyphen.</p>

Input	Details
activityDateTime	Type DateTime Description The date and time when the referral event took place.
accountId	Type String Description ID of the account who is being referred.
leadId	Type String Description ID of the lead record that is used to identify referred members.
opportunity	Type String Description Opportunity record associated with the referral.
productId	Type String Description The ID of the product that the referral purchased.
purchaseAmount	Type String Description The amount the referral spent to purchase one or more units of a product.
purchaseQuantity	Type String Description The number of units that the referral purchased of a product.

Outputs

Output	Details
accountId	Type String

Output	Details
	Description ID of the account that is associated as a referral program member.
referralId	Type String Description The ID of the referral record of the person who was referred, or whose referral event is processed.
leadId	Type String Description ID of the lead record that is used to identify referred members.
referralStage	Type String Description The current stage of the referral promotion for a referral. Possible values are: <ul style="list-style-type: none"> • Promotion Launched • Advocate Joins Promotion • Advocate Refers Friend • Friend Signs Up • Friend Completes First Purchase
transactionJournalIds	Type String Description The comma separate list of transaction journal IDs created to process the referral event.
voucherList	Type String Description The details of the voucher records created for the referral event.
customRewardList	Type String Description The details of the custom reward records created for the referral event.

Example

Sample Request

```
{
  "inputs": [
    {
      "accountId": "001xx000003Ge9HAAS",
      "activityDateTime": "2025-02-13T00:00:00",
      "referralCode": "FR886GFJ-NONMCB2B",
      "eventType": "Refer",
      "purchaseAmount": 40000,
      "purchaseQuantity": 34
    }
  ]
}
```

Sample Response

```
{
  "actionName": "processB2bReferralEvent",
  "errors": null,
  "invocationId": null,
  "isSuccess": true,
  "outcome": null,
  "outputValues": {
    "accountId": "001xx000003Ge9HAAS",
    "opportunityId": "006xx000001a3e8",
    "voucherList": [
      {
        "effectiveDate": "2025-06-26T00:00:00.000Z",
        "expirationDate": "2026-06-30T00:00:00.000Z",
        "transactionJournalId": "01Vxx00000003Fd",
        "voucherCode": "Z41TNEH9",
        "voucherDefinition": "vdef",
        "voucherId": "0kDxx00000000xhEAA"
      },
      {
        "effectiveDate": "2025-06-26T00:00:00.000Z",
        "expirationDate": "2026-06-30T00:00:00.000Z",
        "transactionJournalId": "01Vxx00000003Fe",
        "voucherCode": "YTARIRO3",
        "voucherDefinition": "vdef",
        "voucherId": "0kDxx00000000xiEAA"
      }
    ],
    "transactionJournalIds": [
      "01Vxx00000003Fd",
      "01Vxx00000003Fe"
    ],
    "referralStage": "Referral Closure/Converts",
    "referralId": "0wixx00000000b7",
    "extendedRewardList": [],
    "leadId": "00Qxx000002TSFi"
  }
}
```

```
    },  
    "sortOrder": -1,  
    "version": 1  
  }  
]
```

B2B Referral Management Metadata API Types

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

[Flow for B2B Referral Management](#)

Represents the metadata associated with a flow. Use Flow to create an application that takes users through a series of pages to query and update records in the database. You can also execute logic and provide branching capability based on user input to build dynamic applications.

Flow for B2B Referral Management

Represents the metadata associated with a flow. Use Flow to create an application that takes users through a series of pages to query and update records in the database. You can also execute logic and provide branching capability based on user input to build dynamic applications.

FlowActionCall

B2B Referral Management exposes additional `actionType` values for the `FlowActionCall` Metadata type.

Field Name	Field Type	Description
<code>actionType</code>	<code>InvokableActionType</code> (enumeration of type string)	<p>Required.</p> <p>The action type. Additional valid values only for B2B Referral Management include:</p> <ul style="list-style-type: none">• <code>enrollAdvocateB2bReferralProm</code>—Enroll an existing or new customer as an advocate for a referral promotion. Available in API version 64.0 and later.• <code>processB2bReferralEvent</code>—Create referral event records when an advocate refers a friend, or when referred friends sign up or make a purchase. Available in API version 64.0 and later.

CHAPTER 9 Referral Mobile SDK

In this chapter ...

- [Supported Versions of Tools and Components](#)
- [Referral Mobile SDK for iOS](#)
- [Referral Mobile SDK for Android](#)

Referral programs help increase brand awareness and build a loyal customer base for your brand. Integrate the referral program capability in a mobile application using the Referral Mobile Software Development Kit (SDK) for Android and iOS. Add the SDK as an external dependency in your custom mobile application, or add it to the existing Loyalty Management Mobile SDK, and extend the `MyNTORewards` sample app to include referral promotions.

EDITIONS

Available in: all editions that have Referral Marketing enabled

Supported Versions of Tools and Components

The Referral Mobile SDK works on iOS 15.0+ and Android 8.0+ versions. Install the tools and components required to set up the Referral Mobile SDK.

EDITIONS

Available in: all editions that have Referral Marketing enabled

iOS

Tool or Component	Supported Version	Installation Details
Swift Version	5.7+	Installed by Xcode
Xcode	14.0+	Install from the App Store
iOS SDK	15.0+	Installed by Xcode
Swift Package Manager	5.7+	Included in Swift

Android

Tool or Component	Supported Version	Installation Details
Android Studio Electric Eel	2022.1.1+	Install from the Android Developer site
Android SDK and APIs	8.0+ (API level 26+)	Install from the Android Developer site
Android SDK Tools	8.0+	Install from the Android Developer site
Android Virtual Device	8.0+	Install from Android Studio
Kotlin	1.8.0+	Installed by Android Studio

Referral Mobile SDK for iOS

Clone and import the Referral Mobile iOS SDK to integrate the referral program feature in a mobile app.

EDITIONS

Available in: all editions that have Referral Marketing enabled

[Clone and Import Referral Mobile SDK for iOS](#)

Clone the Referral Mobile iOS SDK GitHub repository to copy the code base and revision history to your local computer. After you clone the repository, import the Referral Mobile iOS SDK in an Xcode project.

[Integrate Referral Mobile iOS SDK into Loyalty Management Mobile iOS SDK](#)

Import the Referral Mobile iOS SDK into the existing Loyalty Management Mobile iOS SDK by adding it as an external dependency.

[Referral Mobile SDK iOS Classes](#)

The iOS classes organize the Referral Mobile SDK's functionality and data structures. When developing mobile apps using the SDK, these classes provide components, services, or features with which you can interact.

[Referral Mobile SDK API Reference for iOS](#)


The Referral Mobile iOS SDK interacts with the Salesforce Referral REST APIs to manage referral-related operations, such as enrolling members in referral programs, and creating referral events.

[Referral Customization for iOS](#)

After you build the Referral Mobile SDK for iOS, you can customize the referral UI components, and modify the referral-related configuration in the MyNTORewards sample app.

Clone and Import Referral Mobile SDK for iOS

Clone the Referral Mobile iOS SDK GitHub repository to copy the code base and revision history to your local computer. After you clone the repository, import the Referral Mobile iOS SDK in an Xcode project.

1. Go to the [Referral Mobile SDK iOS repository](#).
2. To copy the repository URL to your clipboard, click **Code**, and then click .
3. Open Terminal, and go to the directory where you want to clone the repository.
4. Enter `git clone https://github.com/salesforce-misc/ReferralMobileSDK-iOS`.
5. Press Enter and wait for the repository to clone.
6. Open the project where you want to import `ReferralMobileSDK-iOS` in Xcode.
7. Go to **File > Swift Packages > Add Package Dependency**.
8. Click **Add Local**, and then select the local `ReferralMobileSDK-iOS` folder.
9. Select a version, and click **Add Package** and on the confirmation window, click **Add Package**.
10. To import the `ReferralMobileSDK-iOS` module into your Swift file, open the swift file where you want to use `ReferralMobileSDK-iOS`, and to the first line of code, add:

```
import ReferralMobileSDK
```

You can now use the classes, structures, and protocols in the `ReferralMobileSDK-iOS` module to manage and customize the referral program feature in your mobile application.

EDITIONS

Available in: all editions that have Referral Marketing enabled

Integrate Referral Mobile iOS SDK into Loyalty Management Mobile iOS SDK

Import the Referral Mobile iOS SDK into the existing Loyalty Management Mobile iOS SDK by adding it as an external dependency.

1. Open the `LoyaltyMobileSDK-iOS` project in Xcode.
2. Go to **File > Swift Packages > Add Package Dependency**.
3. Enter the repository

URL: `https://github.com/salesforce-misc/ReferralMobileSDK-iOS`, or if you've cloned the repository, click **Add Local**, and then select the local `ReferralMobileSDK-iOS` folder.

4. Select a version, and click **Add Package** and on the confirmation window, click **Add Package**.
5. To import the `ReferralMobileSDK-iOS` module into your Swift file, open the swift file where you want to use `ReferralMobileSDK-iOS`, and to the first line of code, add:

EDITIONS

Available in: all editions that have Referral Marketing enabled

```
import ReferralMobileSDK
```

You can now use the classes, structures, and protocols in the `ReferralMobileSDK-iOS` module to extend, and manage the referral program feature in the `MyNTORewards` sample app.

Referral Mobile SDK iOS Classes

The iOS classes organize the Referral Mobile SDK's functionality and data structures. When developing mobile apps using the SDK, these classes provide components, services, or features with which you can interact.

[ReferralAPIManager](#)

The `ReferralAPIManager` class invokes and manages referral-related REST API requests. Use this class to interact with the Salesforce Referral Marketing APIs and manage referral-related operations.

EDITIONS

Available in: all editions that have Referral Marketing enabled

ReferralAPIManager

The `ReferralAPIManager` class invokes and manages referral-related REST API requests. Use this class to interact with the Salesforce Referral Marketing APIs and manage referral-related operations.

Methods

referralEnrollment

Enroll an existing member to a given promotion using the membership number.

```
public func referralEnrollment(membershipNumber: String,
                               promotionCode: String,
                               memberStatus: String = MemberStatus.active.rawValue,
                               version: String = ReferralAPIVersion.defaultVersion,
                               devMode: Bool = false) async throws ->
    ReferralEnrollmentOutputModel
```

Enroll an existing member to a given promotion using the contact ID.

```
public func referralEnrollment(contactID: String,
                               promotionCode: String,
                               memberStatus: String = MemberStatus.active.rawValue,
                               version: String = ReferralAPIVersion.defaultVersion,
                               devMode: Bool = false) async throws ->
    ReferralEnrollmentOutputModel
```

Enroll a new member to a given promotion.

```
public func referralEnrollment(firstName: String,
                               lastName: String,
                               email: String,
                               membershipNumber: String,
                               promotionCode: String,
                               enrollmentChannel: ReferralEnrollmentChannel =
    ReferralEnrollmentChannel.mobile,
```



```

        memberStatus: String = MemberStatus.active.rawValue,
        tjStatementFrequency: TransactionJournalStatementFrequency
    = .monthly,
        tjStatementMethod: TransactionJournalStatementMethod =
    .email,
        version: String = ReferralAPIVersion.defaultVersion,
        devMode: Bool = false) async throws ->
ReferralEnrollmentOutputModel

```

Parameter	Type	Description
contactID	String	Required. The contact ID of the existing member. Provide either the contact ID, the membership number, or the person account details (first name, last name, and email), and not all.
country	String	The name of the country of the member.
devMode	Boolean	Indicates whether the method is run in the developer mode (<code>true</code>) or not (<code>false</code>).
email	String	Required. The email ID of the member.
enrollmentChannel	String	Channel used to join the referral program. Possible values are: <ul style="list-style-type: none"> • CallCenter • Email • Franchise • Mobile • Partner • Pos • Print • Social • Store • Web The default value is <code>Email</code> .
firstName	String	Required. The first name of the member. Provide either the contact ID, the membership number, or the person account details (first name, last name, and email), and not all.
lastName	String	Required. The last name of the member. Provide either the contact ID, the membership number, or the person account details (first name, last name, and email), and not all.

Parameter	Type	Description
<code>memberStatus</code>	String	Status of the new advocate after enrollment. Possible values are: <ul style="list-style-type: none"> • <code>Active</code> • <code>Inactive</code> • Custom value - Any value defined in your org. For example, if an advocate must be evaluated before confirming enrollment, you can create a status called <code>On Hold</code> and assign it to this field. The default value is <code>Active</code> .
<code>membershipNumber</code>	String	Required. The membership number of the existing member. Provide either the contact ID, the membership number, or the person account details (first name, last name, and email), and not all.
<code>promotionCode</code>	String	Required. The promotion code to enroll for.
<code>state</code>	String	The name of the state of the member.
<code>transactionalJournalFrequency</code>	String	The frequency at which transaction statements must be generated for the advocate. Possible values are: <ul style="list-style-type: none"> • <code>Monthly</code> • <code>Quarterly</code> The default value is <code>Monthly</code> .
<code>transactionalJournalMethod</code>	String	Preferred method of receiving transaction journal statements. Possible values are: <ul style="list-style-type: none"> • <code>Email</code> • <code>Mail</code> The default value is <code>Email</code> .
<code>version</code>	String	The API version.

referralEvent

Send referral emails to the given recipients.

```
public func referralEvent(emails: [String],
                        referralCode: String,
                        eventType: ReferralEventType = .refer,
```

```
version: String = ReferralAPIVersion.defaultVersion,
devMode: Bool = false) async throws -> ReferralEventOutputModel
```

Parameter	Type	Description
devMode	Boolean	Indicates whether the method is run in the developer mode (<code>true</code>) or not (<code>false</code>).
emails	String[]	Required. A list of recipient emails to share the referral code with.
eventType	String	The type of event. Possible values are: <ul style="list-style-type: none"> • Enrollment • Purchase • Refer The default value is <code>Refer</code> .
referralCode	String	Required. The referral code to share with the recipients.
version	String	The API version.

Referral Mobile SDK API Reference for iOS

The Referral Mobile iOS SDK interacts with the Salesforce Referral REST APIs to manage referral-related operations, such as enrolling members in referral programs, and creating referral events.

EDITIONS

Available in: all editions that have Referral Marketing enabled.

Referral Enrollment

Enroll an existing or new customer to a referral promotion.

Referral event

Create referral event records when an advocate refers a friend, or when the referred friends sign up or make a purchase.

Referral Enrollment

Enroll an existing or new customer to a referral promotion.

Resource

```
referralEnrollment (membershipNumber:promotionCode:memberStatus:version:devMode)
```

```
referralEnrollment (contactID:promotionCode:memberStatus:version:devMode)
```

```
referralEnrollment (firstName:lastName:email:membershipNumber:promotionCode:enrollmentChannel:memberStatus:startDate:expiryDate:method:version:devMode)
```

Signature

```
public func referralEnrollment(membershipNumber: String,
                              promotionCode: String,
                              memberStatus: String = MemberStatus.active.rawValue,
                              version: String = ReferralAPIVersion.defaultVersion,
                              devMode: Bool = false) async throws ->
ReferralEnrollmentOutputModel
```

```
public func referralEnrollment(contactID: String,
                              promotionCode: String,
                              memberStatus: String = MemberStatus.active.rawValue,
                              version: String = ReferralAPIVersion.defaultVersion,
                              devMode: Bool = false) async throws ->
ReferralEnrollmentOutputModel
```

```
public func referralEnrollment(firstName: String,
                              lastName: String,
                              email: String,
                              membershipNumber: String,
                              promotionCode: String,
                              enrollmentChannel: ReferralEnrollmentChannel =
ReferralEnrollmentChannel.mobile,
                              memberStatus: String = MemberStatus.active.rawValue,
                              tjStatementFrequency: TransactionJournalStatementFrequency
= .monthly,
                              tjStatementMethod: TransactionJournalStatementMethod =
.email,
                              version: String = ReferralAPIVersion.defaultVersion,
                              devMode: Bool = false) async throws ->
ReferralEnrollmentOutputModel
```

Input Parameters

Parameter	Type	Description
contactID	String	Required. The contact ID of the existing member. Provide either the contact ID, the membership number, or the person account details (first name, last name, and email), and not all.
country	String	The name of the country of the member.
devMode	Boolean	Indicates whether the method is run in the developer mode (<code>true</code>) or not (<code>false</code>).
email	String	Required. The email ID of the member. Provide either the contact ID, the membership number, or the person account details (first name, last name, and email), and not all.

Parameter	Type	Description
enrollmentChannel	String	Channel used to join the referral program. Possible values are: <ul style="list-style-type: none"> • CallCenter • Email • Franchise • Mobile • Partner • Pos • Print • Social • Store • Web The default value is <code>Email</code> .
firstName	String	Required. The first name of the member. Provide either the contact ID, the membership number, or the person account details (first name, last name, and email), and not all.
lastName	String	Required. The last name of the member. Provide either the contact ID, the membership number, or the person account details (first name, last name, and email), and not all.
memberStatus	String	Status of the new advocate after enrollment. Possible values are: <ul style="list-style-type: none"> • Active • Inactive • Custom value - Any value defined in your org. For example, if an advocate must be evaluated before confirming enrollment, you can create a status called <code>On Hold</code> and assign it to this field. The default value is <code>Active</code> .
membershipNumber	String	Required. The membership number of the existing member. Provide either the contact ID, the membership number, or the person account details (first name, last name, and email), and not all.
promotionCode	String	Required. The promotion code to enroll for.

Parameter	Type	Description
state	String	The name of the state of the member.
transactionalJournalFrequency	String	Frequency at which transaction statements must be generated for the advocate. Possible values are: <ul style="list-style-type: none">• Monthly• Quarterly The default value is <code>Monthly</code> .
transactionalJournalMethod	String	Preferred method of receiving transaction journal statements. Possible values are: <ul style="list-style-type: none">• Email• Mail The default value is <code>Email</code> .
version	String	The API version.

Return Value

A `ReferralEnrollmentOutputModel` instance.

```
public struct ReferralEnrollmentOutputModel: Codable
```

Sample Output

```
{
  "contactId": "003R0000003vJeU",
  "memberId": "01MRO0000000nO",
  "membershipNumber": "DemoJun21",
  "programName": "DemoProgram",
  "promotionReferralCode": "ZB74ANSO-DemoPromo1",
  "transactionJournals": [
    {
      "activityDate": "2023-06-21T13:37:26.000Z",
      "journalSubType": "Member Enrollment",
      "journalType": "Referral",
      "membershipNumber": "DemoJun21",
      "programName": "DemoProgram",
      "status": "Processed",
      "transactionJournalId": "01VRO00000002wV"
    }
  ]
}
```

Output Parameters

[Referral Advocate Enrollment](#)

Referral event

Create referral event records when an advocate refers a friend, or when the referred friends sign up or make a purchase.

Resource

```
referralEvent(emails:referralCode:eventType:version:devMode)
```

Signature

```
public func referralEvent(emails: [String],
                          referralCode: String,
                          eventType: ReferralEventType = .refer,
                          version: String = ReferralAPIVersion.defaultVersion,
                          devMode: Bool = false) async throws -> ReferralEventOutputModel
```

Input Parameters

Parameter	Type	Description
devMode	Boolean	Indicates whether the method is run in the developer mode (<code>true</code>) or not (<code>false</code>).
emails	String[]	Required. A list of recipient emails to share the referral code with.
eventType	String	The type of event. Possible values are: <ul style="list-style-type: none">• Enrollment• Purchase• Refer The default value is <code>Refer</code> .
referralCode	String	Required. The referral code to share with the recipients.
version	String	The API version.

Return Value

A `ReferralEventOutputModel` instance.

```
public struct ReferralEventOutputModel: Codable
```

Sample Output

```
{
  "contactIds":[
    "0031Q00002kCusB"
  ],
  "referralIds":[
    "0wi1Q0000001jna"
  ],
  "referralStage":"Friend Completes First Purchase",
  "transactionJournalIds":[
    "01V1Q0000019gJg",
    "01V1Q0000019gJh"
  ],
  "voucherId":"0kD1Q000000keXVUAY"
}
```

Output Parameters

[Referral Event Output](#)

Referral Customization for iOS

After you build the Referral Mobile SDK for iOS, you can customize the referral UI components, and modify the referral-related configuration in the MyNTORewards sample app.

UI Customization

The referral UI components are available in

`LoyaltyMobileSDK-iOS/SampleApps/MyNTORewards/MyNTORewards/Referral/Views`.

For example, to include Gmail as one of the options to share a referral code:

- Add the new Gmail icon in the `LoyaltyMobileSDK-iOS/SampleApps/MyNTORewards/MyNTORewards/Assets.xcassets` folder.
- Open the `LoyaltyMobileSDK-iOS/SampleApps/MyNTORewards/MyNTORewards/Referral/Views/ReferAFriendView.swift` file in Xcode, and add the new icon ID to the list of icon IDs.

```
HStack("spacing":15) {
  "Button"{
    "showShareSheet.toggle()"
  }"label":{
    "Image("ic-fb")"
  }".sheet(isPresented:"$showShareSheet)" {
    "ActivityViewController(activityItems":[
      "shareText"
    ])"
  }"Button"{
    "showShareSheet.toggle()"
  }"label":{
    "Image("ic-ig")"
  }".sheet(isPresented:"$showShareSheet)" {
```



```

        "ActivityViewController(activityItems":[
            "shareText"
        ]) "
    } "Button"{
        "shareToWhatsApp(text":"shareText) "
    } "label":{
        "Image("ic-whatsapp") "
    } "Button"{
        "shareToTwitter(text":"shareText) "
    } "label":{
        "Image("ic-twitter") "
    } "Button"{
        "shareToGmail(text":"shareText) "
    } "label":{
        "Image("ic-gmail") "
    } "Button"{
        "showShareSheet.toggle() "
    } "label":{
        "Image("ic-share") "
    }
}

```

Settings Customization

You can modify the referral program details in the

LoyaltyMobileSDK-iOS/SampleApps/SampleApps/MyNTORewards/MyNTORewards/AppSettings.swift file.

Here are all the properties you can modify.

```

// Referral settings
static let referralProgramName = loyaltyProgramName
// Configure the referral promotion details below, where a user can enroll and refer from
the My Referrals screen
static let promotionCode = "TEMPRP7"
static let referralDateFormat = "yyyy-MM-dd'T'HH:mm:ss"
static let referralDateFormatWithoutTime = "yyyy-MM-dd"
/* Provided an example link here instead of the actual Terms and Conditions link.
Replace with valid terms and conditions link while using the feature */
static let referralTermsLink = "https://www.google.com"

```

- `promotionCode`: The default promotion code.
- `referralDateFormat` and `referralDateFormatWithoutTime`: The referral activity date format with and without time.
- `referralProgramName`: The default referral program name.
- `referralTermsLink`: An external Terms and Conditions link.

For a complete walkthrough of the referral feature in the MyNTORewards app, see [Walkthrough of the Sample App](#).



Note: An advocate can refer a friend only once. When an advocate makes repeated attempts to refer a friend, you can show a custom message based on your company's branding.

Referral Mobile SDK for Android

Clone and import the Referral Mobile Android SDK to integrate the referral program feature in a mobile app.

[Clone and Import Referral Mobile SDK for Android](#)

Clone the GitHub repository for the Referral Mobile Android SDK to copy the code base and revision history of the repository to your local computer. After you clone the repository, import the Referral Mobile Android SDK in Android Studio to automatically download and manage external dependencies.

[Integrate Referral Mobile Android SDK into Loyalty Management Mobile Android SDK](#)

To integrate the Referral Mobile Android SDK into the existing Loyalty Management Mobile Android SDK, add it as an external dependency.

[Referral Mobile SDK Android Classes](#)

The Android classes organize the Referral Mobile SDK's functionality and data structures. When developing mobile apps using the SDK, these classes provide components, services, or features with which you can interact.

[Referral Mobile Android SDK API Reference](#)

The Referral Mobile Android SDK interacts with the Salesforce Referral APIs to manage referral-related operations, such as enrolling members in referral programs, and creating referral events.

[Referral Customization for Android](#)


After you build the Referral Mobile SDK for Android, you can customize the referral UI components, and modify the referral-related configuration in the MyNTORewards sample app.

EDITIONS

Available in: all editions that have Referral Marketing enabled

Clone and Import Referral Mobile SDK for Android

Clone the GitHub repository for the Referral Mobile Android SDK to copy the code base and revision history of the repository to your local computer. After you clone the repository, import the Referral Mobile Android SDK in Android Studio to automatically download and manage external dependencies.

1. Go to the [Referral Mobile SDK Android](#) repository.
2. To copy the repository URL to your clipboard, click **Code**, and then click .
3. Open Terminal, and go to the directory where you want to clone the repository.
4. Enter `git clone https://github.com/loyaltysampleapp/ReferralMobileSDK-Android`.
5. Press Enter and wait for the repository to clone.
6. Unzip the `ReferralMobileSDK-Android` package that you downloaded.
7. Open Android Studio.
8. Go to **File > New > Import Project**, and then select the `ReferralMobileSDK-Android` folder.
9. Click **Open**.
10. Open the SDK files and ensure that the files include the appropriate SDK packages.



Note: If the sync fails, disconnect the VPN to ensure there's no blocker when downloading the dependencies, and then resync.

EDITIONS

Available in: all editions that have Referral Marketing enabled

You can now use the classes and interfaces in the `ReferralMobileSDK-Android` module to manage and customize the referral program feature in your application.

Integrate Referral Mobile Android SDK into Loyalty Management Mobile Android SDK

To integrate the Referral Mobile Android SDK into the existing Loyalty Management Mobile Android SDK, add it as an external dependency.

EDITIONS

Available in: all editions that have Referral Marketing enabled

1. Open Terminal, and go to the `LoyaltyMobileSDK-Android` folder.

2. Run these commands:

```
git submodule add
git@github.com:loyaltysampleapp/ReferralMobileSDK-Android.git
git submodule sync
git submodule update
cd ReferralMobileSDK-Android
git submodule update --init --recursive --remote
```

3. Open the `LoyaltyMobileSDK-Android` project in Android Studio.

4. Click **Open**.

5. Open the `SampleApps/MyNTORewards/build.gradle` file, and under Dependencies block, to the first line of Dependencies, add:

```
implementation(project(":ReferralMobileSDK-Android:ReferralMobileSDK"))
```

6. Open the `SampleApps/MyNTORewards/connectedapp.properties` file and modify the properties of the connected app as per your org.

7. Click **Sync Now**.

8. Open the SDK files and ensure that the files include the appropriate SDK packages.



Note: If the sync fails, disconnect the VPN to ensure there's no blocker when downloading the dependencies, and then resync.

9. To add the Referral SDK package, include this code snippet in your code.

```
`import com.salesforce.referral.api.*
import com.salesforce.referral.entities.*
import com.salesforce.referral.repository.*
import com.salesforce.referral.utils.*`
```

You can now use the classes and interfaces in the `ReferralMobileSDK-Android` module to extend and manage the referral program feature in the MyNTORewards sample app.

Referral Mobile SDK Android Classes

The Android classes organize the Referral Mobile SDK’s functionality and data structures. When developing mobile apps using the SDK, these classes provide components, services, or features with which you can interact.

ReferralsRepository

The `ReferralsRepository` interface invokes and manages referral-related REST API requests. Use this class to interact with the Salesforce Referral Marketing APIs and manage referral-related operations.

EDITIONS

Available in: all editions that have Referral Marketing enabled

ReferralsRepository

The `ReferralsRepository` interface invokes and manages referral-related REST API requests. Use this class to interact with the Salesforce Referral Marketing APIs and manage referral-related operations.

Methods

enrollNewCustomerAsAdvocateOfPromotion

Enroll a new member to a given promotion.

```
val result: ApiResponse<ReferralEnrollmentResponse> =
    repository.enrollNewCustomerAsAdvocateOfPromotion(firstName = "John",

        lastName = "Doe",

        email = "john.doe@example.com",

        promotionName = "Referral Program",

        promotionCode = "PromoCode"

    )
```

Parameter	Type	Description
country	String	The name of the country of the member.
email	String	Required. The email ID of the member.
enrollmentChannel	String	Channel used to join the referral program. Possible values are: <ul style="list-style-type: none">• CallCenter• Email• Franchise• Mobile• Partner• Pos

Parameter	Type	Description
		<ul style="list-style-type: none"> • Print • Social • Store • Web <p>The default value is <code>Email</code>.</p>
<code>firstName</code>	String	Required. The first name of the member.
<code>lastName</code>	String	Required. The last name of the member.
<code>memberStatus</code>	String	<p>Status of the new advocate after enrollment.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Active • Inactive • Custom value - Any value defined in your org. For example, if an advocate must be evaluated before confirming enrollment, you can create a status called <code>On Hold</code> and assign it to this field. <p>The default value is <code>Active</code>.</p>
<code>promotionName</code>	String	Required. The promotion name to enroll for.
<code>promotionCode</code>	String	Required. The promotion code to enroll for.
<code>state</code>	String	The name of the state of the member.
<code>transactionalJournalFrequency</code>	String	<p>Frequency at which transaction statements must be generated for the advocate.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Monthly • Quarterly <p>The default value is <code>Monthly</code>.</p>
<code>transactionalJournalMethod</code>	String	<p>Preferred method of receiving transaction journal statements.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Email • Mail <p>The default value is <code>Email</code>.</p>

enrollExistingAdvocateToPromotionWithMembershipNumber

Enroll an existing member to a given promotion using the membership number.

```
val result: ApiResponse<ReferralEnrollmentResponse> =
    repository.enrollExistingAdvocateToPromotionWithMembershipNumber(
        promotionName = "Referral Program", promotionCode = "PromoCode",
        membershipNumber = "1234567890"
    )
```

Parameter	Type	Description
promotionName	String	Required. The promotion name to enroll for.
promotionCode	String	Required. The promotion code to enroll for.
membershipNumber	String	Required. The membership number of the existing member.

enrollExistingAdvocateToPromotionWithContactId

Enroll an existing member to a given promotion using the contact ID.

```
val result: ApiResponse<ReferralEnrollmentResponse> =
    repository.enrollExistingAdvocateToPromotionWithContactId(
        promotionName = "Referral Program", promotionCode = "PromoCode",
        contactId = "0c12sed3456kpPl"
    )
```

Parameter	Type	Description
promotionName	String	Required. The promotion name to enroll for.
promotionCode	String	Required. The promotion code to enroll for.
contactId	String	Required. The contact ID of the existing member.

enrollExistingAdvocateToNewPromotion

Enroll an existing member to a new promotion.

```
val result: ApiResponse<ReferralEnrollmentResponse> =
    repository.enrollExistingAdvocateToNewPromotion(
        promotionName = "Referral Program", promotionCode = "PromoCode"
    )
```

Parameter	Type	Description
promotionName	String	Required. The promotion name to enroll for.
promotionCode	String	Required. The promotion code to enroll for.

sendReferrals

Send referral emails to the given recipients.

```
val eventOutput: ApiResponse<ReferralEventResponse> = repository.sendReferrals(referralCode = "ReferralCode", emails = listOf("john.doe@example.com"))
```

Parameter	Type	Description
referralCode	String	Required. The referral code to share with the recipients.
emails	List<String>	Required. A list of recipient emails to share the referral code with.

Referral Mobile Android SDK API Reference

The Referral Mobile Android SDK interacts with the Salesforce Referral APIs to manage referral-related operations, such as enrolling members in referral programs, and creating referral events.

Interact with the Referral APIs, including:

Resource	Description
/referral-program/enroll-existing-customer on page 120	Enroll an existing or new customer to a referral promotion.
/referral-program/referral-event on page 126	Create referral event records when an advocate refers a friend, or when the referred friends sign up, or make a purchase.

EDITIONS

Available in: all editions that have Referral Marketing enabled

Referral Customization for Android

After you build the Referral Mobile SDK for Android, you can customize the referral UI components, and modify the referral-related configuration in the MyNTORewards sample app.

UI Customization

The referral UI components are available in the `/LoyaltyMobileSDK-Android/SampleApps/MyNTORewards/src/main/java/com/salesforce/loyalty/mobile/myntorewards/views/components` package.

For example, to include the Gmail icon as one of the sharing options in the app:

- Add the new Gmail icon in the `LoyaltyMobileSDK-Android/SampleApps/MyNTORewards/src/main/res/drawable` folder.
- Open the `LoyaltyMobileSDK-Android/SampleApps/MyNTORewards/src/main/java/com/salesforce/loyalty/mobile/myntorewards/utilities/ShareType.kt`

file in Android Studio, and add an entry for Gmail that contains the new icon ID, the Gmail package name, and the `INTENT_TYPE_MAIL` constant inside the `ShareType` enum class.

```
* This class holds the all possible social media sharing options
* To customise the social media icons, change the iconIds configured below
* To add new sharing option, add below with iconId, packageName and Intent share type
*/
enum class ShareType(@DrawableRes val iconId: Int, val packageName: String?, val
intentShareType: String? = ShareType.INTENT_TYPE_TEXT) {
    FACEBOOK(R.drawable.ic_facebook, ShareType.FACEBOOK_APP_PACKAGE,
ShareType.INTENT_TYPE_IMAGE),
    INSTAGRAM(R.drawable.ic_instagram, ShareType.INSTAGRAM_APP_PACKAGE),
    WHATSAPP(R.drawable.ic_whatsapp, ShareType.WHATSAPP_APP_PACKAGE),
    TWITTER(R.drawable.ic_twitter, ShareType.TWITTER_APP_PACKAGE),
    GMAIL(R.drawable.ic_gmail, ShareType.GMAIL_APP_PACKAGE, ShareType.INTENT_TYPE_MAIL),
    SHARE_OTHERS(R.drawable.ic_share, null); // Package name is null as its generic sharing
option

    companion object {
        const val INTENT_TYPE_TEXT = "text/plain"
        const val INTENT_TYPE_IMAGE = "image/*"
        const val INTENT_TYPE_MAIL = "message/rfc822"
        const val FACEBOOK_APP_PACKAGE = "com.facebook.katana"
        const val WHATSAPP_APP_PACKAGE = "com.whatsapp"
        const val INSTAGRAM_APP_PACKAGE = "com.instagram.android"
        const val TWITTER_APP_PACKAGE = "com.twitter.android"
        const val GMAIL_APP_PACKAGE = "com.google.android.gm"
    }
}
```

Settings Customization

You can modify the referral program details in the

`LoyaltyMobileSDK-Android/SampleApps/MyNTRewards/src/main/java/com/salesforce/loyalty/mobile/myntorewards/referrals/ReferralConfig.kt` file.

Here are all the properties you can modify.

```
/**
 * Referral configuration class
 */
object ReferralConfig {
    // Referral Program Name
    const val REFERRAL_PROGRAM_NAME = "NTO Insider"
    // Configure Referral Promotion Details below, where user can also able to enroll and
refer from My Referrals screen
    const val REFERRAL_DEFAULT_PROMOTION_CODE = "TEMPRP7"
    const val REFERRAL_DEFAULT_PROMOTION_ID = "0c81Q0000004UL4QAM"
    // Referral duration - By default, showing the last 90days of referrals info
    const val REFERRAL_DURATION = 90
    /* Provided random link here instead of actual Terms and Conditions link.
Replace with valid terms and conditions link while using the feature */
    const val REFERRAL_TANDC_LINK = "https://www.google.co.in/"
}
```


- `REFERRAL_DEFAULT_PROMOTION_CODE` and `REFERRAL_DEFAULT_PROMOTION_ID`: The default promotion code and ID.
- `REFERRAL_DURATION`: The period in days for which the referral details are to be displayed. By default, the sample app shows the referral information of the last 90 days.
- `REFERRAL_PROGRAM_NAME`: The default referral program name.
- `REFERRAL_TANDC_LINK`: An external Terms and Conditions link.

For a complete walkthrough of the referral feature in the MyNTORewards app, see [Walkthrough of the Sample App](#).



Note: An advocate can refer a friend only once. When an advocate makes repeated attempts to refer a friend, you can show a custom message based on your company's branding.