

Channel Revenue Management Developer Guide

Salesforce, Winter '26





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CHANNEL PARTNER INVENTORY TRACKING STANDARD OBJECTS

Channel Partner Inventory Tracking data model provides objects and fields to monitor partner inventory levels, manage stock movements, and track product consumption. Use these objects to improve supply chain visibility and reduce revenue leakage by optimizing partner stock.

EDITIONS

Available in: Lightning Experience

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

AccountLeadTime

Represents the estimated lead time for an account for a specific activity type. The business specifies this value to indicate the time needed to complete the activity. This object is available in API version 65.0 and later.

PartnerStagedData

Represents data from partners, such as point of sale and reported inventory data, stored for further processing before being used in downstream processes such as inventory tracking, inventory reconciliation, and ship and debit claim validation. This object is available in API version 64.0 and later.

PartnerUnsoldInvLedger

Monitors the deduction details and links credit and debit transactions. This object is available in API version 64.0 and later.

PartnerUnsoldInventory

Tracks the product quantities available with a partner at a specific price. This object is available in API version 64.0 and later.

PtnrlnvltmRecon

Represents a partner reported inventory reconciliation for a product at a location for a particular price. This object is available in API version 64.0 and later.

PtnrlnvltmReconTrace

Represents the source of a partner's calculated unsold inventory on a specific date. This object is available in API version 64.0 and later.

PtnrlnvRecon

Represents the reconciliation of a partner's reported inventory with the partner's calculated unsold inventory on a specific date. This object is available in API version 64.0 and later.

TransitTime

Represents the expected duration for a movement between locations. The business specifies the transit time required for inventory to move between two locations. This object is available in API version 65.0 and later.

Rebate Management Object in Channel Partner Inventory Tracking

Rebate Management provides access to a standard objects that you can use in Channel Partner Inventory Tracking for the transactions that need to be processed for a rebate program

AccountLeadTime

Represents the estimated lead time for an account for a specific activity type. The business specifies this value to indicate the time needed to complete the activity. This object is available in API version 65.0 and later.

Supported Calls

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

Field	Details		
AccountId	Type reference		
	Properties Create, Filter, Group, Sort, Update		
	Description Required. Represents the account associated with this specific lead time record.		
	This field is a relationship field.		
	Relationship Name Account		
	Refers To Account		
CurrencyIsoCode	Type picklist		
	Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update		
	Description Specifies the currency ISO code for the currency fields.		
	Possible values are:		
	• INR—Indian Rupee		
	KWD—Kuwaiti Dinar		
	• USD—U.S. Dollar		
	The default value is USD.		
Duration	Type int		
	Properties		
	Create, Filter, Group, Sort, Update		
	Description		
	Required. The time taken for the inventory to be shipped from the source to the destination.		
DurationType	Туре		
	picklist		

Field	Details		
	Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update		
	Description Required. Specifies how the duration is measured.		
	Possible values are:		
	• Days		
	• Months		
	• Weeks		
	The default value is Days.		
LeadTimeType	Type picklist		
	Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update		
	Description Required. Specifies the purpose of the lead time, such as transit, service, or fulfillment, for this record.		
	Possible values are:		
	• Service		
	• Transit		
	The default value is Transit.		
Name	Type string		
	Properties		
	Autonumber, Defaulted on create, Filter, idLookup, Sort		
	Description The name of the account lead time record.		
OwnerId	Type reference		
	Properties Create, Defaulted on create, Filter, Group, Sort, Update		
	Description The owner of the account lead time record.		
	This field is a polymorphic relationship field.		
	Relationship Name Owner		
	Refers To Group, User		

Field	Details
Status	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update
	Description Required. Specifies the status of the record.
	Possible values are:
	• Active
	• Inactive
	The default value is Active.

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

AccountLeadTimeHistory on page 332

History is available for tracked fields of the object.

AccountLeadTimeOwnerSharingRule on page 333

Sharing rules are available for the object.

AccountLeadTimeShare on page 335

Sharing is available for the object.

PartnerStagedData

Represents data from partners, such as point of sale and reported inventory data, stored for further processing before being used in downstream processes such as inventory tracking, inventory reconciliation, and ship and debit claim validation. 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()

Field	Details
AccountId	Type reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The account ID of the partner that shares the data.
	This field is a relationship field.
	Relationship Name Account
	Refers To Account
AccountName	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The account name of the partner that shares the data.
ActivityDate	Type date
	Properties Create, Filter, Group, Sort, Update
	Description Required. The activity date for the partner staged data record, such as a transaction date or an inventory reported as of date.
CurrencyIsoCode	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description Specifies the currency ISO code for the currency fields.
	Possible values are:
	• INR—Indian Rupee
	Kwd—Kuwaiti Dinar
	• USD—U.S. Dollar
	The default value is USD.
ExternalRecordIdentifier	Type string
	Properties
	Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The identifier for the partner staged data record in an external system.
LocationId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The location ID that's associated with the partner staged data record.
	This field is a relationship field.
	Relationship Name Location
	Refers To Location
LocationName	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The location name that's associated with the partner staged data record.
Name	Type string
	Properties Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description The name of the partner staged data record.
OwnerId	Type reference
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description The name of the location that's associated with the partner staged data record.
	This field is a polymorphic relationship field.
	Relationship Name Owner
	Refers To Group, User

Field	Details
ProductId	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The product ID associated with the partner staged data record.
	This field is a relationship field.
	Relationship Name Product
	Refers To
	Product2
ProductName	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The name of the product that's associated with the partner staged data record.
Quantity	Туре
	double
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The quantity of the product in a sale transaction or an inventory report.
ResalePrice	Туре
	currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The price at which a partner sells a product to a customer.
SalePrice	Туре
	currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The price at which a manufacturer sells a product to a partner.

Field	Details
Status	Туре
	picklist
	Properties
	Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update
	Description
	Required. Specifies the status of the partner staged data record.
	Possible values are:
	• Failed
	• New
	• Processed
	The default value is New.
StatusMessage	Туре
	textarea
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	A message with the details of the partner stage data record's status.
Туре	Туре
	picklist
	Properties Control of the Control of
	Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update
	Description Required. The type of the partner staged data record.
	Possible values are:
	PartnerReportedInventoryDocument
	• PointOfSaleDocument
	• PointOfSaleReturnDocument
	• SaleDocument
	The default value is SaleDocument.
UsageType	Туре
	picklist
	Properties
	Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update
	Description
	Required. The usage type of the partner staged data record.
	Possible values are:

Field	Details
	• ChannelRevenueManagement
	The default value is ChannelRevenueManagement.

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

PartnerStagedDataHistory on page 332

History is available for tracked fields of the object.

PartnerStagedDataOwnerSharingRule on page 333

Sharing rules are available for the object.

PartnerStagedDataShare on page 335

Sharing is available for the object.

PartnerUnsoldInvLedger

Monitors the deduction details and links credit and debit transactions. 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()

Field	Details
AvailableDate	Type date
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Specifies the date the unsold inventory was made available.
Comment	Type textarea
	Properties Create, Nillable, Update
	Description Specifies the details of the ledger entry.

Field	Details
CurrencyIsoCode	Туре
	picklist
	Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description Specifies the currency ISO code for the currency fields.
	Possible values are:
	• INR—Indian Rupee
	• кwd—Kuwaiti Dinar
	• USD—U.S. Dollar
	The default value is USD.
Name	Туре
	string
	Properties Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description The name of the partner unsold inventory ledger record.
PartnerUnsoldInventoryId	Type reference
	Properties Create, Filter, Group, Sort
	Description Specifies the unsold quantity of inventory available with the partner.
	This field is a relationship field.
	Relationship Name PartnerUnsoldInventory
	Relationship Type Master-detail
	Refers To PartnerUnsoldInventory (the master object)
Quantity	Туре
	double
	Properties Create, Filter, Sort
	Description Required. Specifies the quantity of unsold inventory being used.

Field	Details
$\label{lem:consumedQuantity} Rebate {\tt ClaimConsumedQuantity}$	
	double
	Properties Create, Filter, Nillable, Sort, Update
	Description Specifies the quantity of the partner unsold inventory ledger that's consumed to calculate a rebate claim's amount.
RebateClaimId	Type reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description Specifies the rebate claim ID for the point of sale that's associated with the partner unsold inventory ledger.
	This field is a relationship field.
	Relationship Name RebateClaim
	Refers To RebateClaim
SourceType	Type picklist
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort
	Description
	Specifies the type of source for creating the ledger record.
	Possible values are:
	• ManualAdjustment
	PartnerReturn
	• PointOfSale
	• PointOfSaleReturn
	• PriceProtection
	• SaleDocument
Status	Туре
	picklist
	Properties
	Create, Filter, Group, Restricted picklist, Sort, Update

Field	Details
	Description
	Required. Specifies the status of the ledger entry.
	Possible values are:
	• Approved
	• InTransit
	• Moved
	• OnHold
	• Rejected
TransactionDate	Туре
	date
	Properties
	Create, Filter, Group, Sort
	Description Required. Specifies the date of the transaction.
TransactionReferenceId	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort
	Description Required. Specifies the reference to the transaction that decides whether the transaction is debit or credit.
	This field is a polymorphic relationship field.
	Relationship Name TransactionReference
	Refers To PartnerUnsoldInventory, PriceProtectExecLineItem, PtnrInvItmRecon, TransactionJournal
TransactionType	Type picklist
	Properties Create, Filter, Group, Restricted picklist, Sort
	Description Required. Specifies whether the transaction type is debit or credit.
	Possible values are:
	• Credit
	• Debit

Field	Details
TransitDrtnReferenceRecordId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The transit duration for inventory movement between locations.
	This field is a polymorphic relationship field.
	Relationship Name TransitDrtnReferenceRecord
	Refers To AccountLeadTime, TransitTime
UnitPrice	Type currency
	Properties Filter, Nillable, Sort
	Description Specifies the per unit price of the unsold inventory.

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

PartnerUnsoldInvLedgerHistory on page 332

History is available for tracked fields of the object.

PartnerUnsoldInventory

Tracks the product quantities available with a partner at a specific price. 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()

Field	Details
AccountId	Туре
	reference
	Properties
	Create, Filter, Group, Sort, Update
	Description Required. The ID of the partner or the distributor account for which the sale has happened
	Relationship Name Account
	Refers To
	Account
CurrencyIsoCode	Туре
	picklist
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	Specifies the currency ISO code for the currency fields.
	Possible values are:
	• INR—Indian Rupee
	KWD—Kuwaiti Dinar
	• USD—U.S. Dollar
	The default value is USD.
ExecutionReferenceNumber	Туре
	string
	Properties
	Create, Filter, Group, idLookup, Nillable, Sort, Update
	Description
	The unique execution reference number for the unsold inventory.
InTransitQuantity	Туре
	double
	Properties
	Filter, Nillable, Sort
	Description
	The inventory quantity that's currently in transit.
	This field is a calculated field.

Field	Details
LocationId	Туре
	reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The location of partner to which this sale is received.
	This field is a relationship field.
	Relationship Name Location
	Refers To Location
Name	Type string
	Properties Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description The name of the partner unsold inventory record.
OnHoldCreditQuantity	Type double
	Properties Filter, Nillable, Sort
	Description The inventory quantity that's on hold for being credited. This quantity is a sum of the quantity of all related partner unsold inventory ledgers with the Credit transaction type and the On Hold status.
	This field is a calculated field.
OnHoldQuantity	Type double
	Properties Filter, Nillable, Sort
	Description The quantity of inventory kept on hold for a product that has been ordered but not yet shipped.
	This field is a calculated field.
OrigUnsoldInventoryValue	Type currency

Field	Details
	Properties
	Filter, Nillable, Sort
	Description The total value of the original quantity of unsold units that's calculated by multiplying the original number of unsold units with the unit price.
	This field is a calculated field.
OriginalQuantity	Туре
	double
	Properties
	Create, Filter, Sort
	Description Required. The total value of the original quantity.
OwnerId	Type reference
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description The ID of the user or group that owns the partner unsold inventory record.
	This field is a polymorphic relationship field.
	Relationship Name Owner
	Refers To Group, User
PriceProtectionExpiryDate	Type date
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The date from when the price protection option expires for the inventory.
PriceProtectionStartDate	Туре
	date
	Properties
	Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description
	The date from when the price protection option is valid for the inventory.
PriceType	Type picklist
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description Required. The type of price at which the item is sold.
	Possible values are:
	• ContractPrice
	• ListPrice
ProcessingStatus	Type picklist
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description The asynchronous processing status, which is used to determine the eligibility for price protection.
	Possible values are:
	• Error
	• Processed
ProcessingStatusReason	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The reason for the status of the asynchronous process.
ProductId	Type reference
	Properties Create, Filter, Group, Sort, Update
	Description The ID of the product that is being sold.
	This field is a relationship field.
	Relationship Name Product

Field	Details
	Refers To Product2
RebatePartnerSpecialPrcTrmId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The rebate partner special pricing term that's used to determine the start and end date of the ship and debit program that's associated with the partner unsold inventory.
	This field is a relationship field.
	Relationship Name RebatePartnerSpecialPrcTrm
	Refers To RebatePartnerSpecialPrcTrm
RebateTypeId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The ID of the rebate type which is associated with the partner unsold inventory record.
	This field is a relationship field.
	Relationship Name RebateType
	Refers To ProgramRebateType
RemainingQuantity	Type double
	Properties Filter, Nillable, Sort
	Description The remaining quantity, which is updated based on the debits point of sale.
	This field is a calculated field.
RmnUnsoldInventoryValue	Туре
	currency
	Properties Filter, Nillable, Sort

Field Details Description The total value of the leftover quantity of unsold units that's calculated by multiplying the number of leftover unsold units with the unit price. This field is a calculated field. ShipAndDebitPgmEndDate Type date **Properties** Create, Filter, Group, Nillable, Sort, Update Description The date when the ship and debit program ends. ShipAndDebitPgmStartDate Type date **Properties** Create, Filter, Group, Nillable, Sort, Update Description The date when the ship and debit program starts. SourcePartnerUnsoldInvId Type reference **Properties** Create, Filter, Group, Nillable, Sort, Update Description The source partner unsold inventory record that's used to create a new partner unsold inventory record containing the updated product price. This field is a relationship field. **Relationship Name** SourcePartnerUnsoldInv **Refers To** PartnerUnsoldInventory TotalRebateClaimConsumedQty Type double **Properties** Filter, Nillable, Sort Description The total quantity of the partner unsold inventory that's consumed to calculate amounts of rebate claims. It's the sum of the rebate claim consumed quantities of the partner unsold inventory ledgers that are related to a partner unsold inventory. This field is a calculated field.

Field	Details
TransactionDate	Туре
	date
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The transaction date of the sale.
TransactionReferenceId	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The reference ID for the credit transaction to the partner.
	This field is a polymorphic relationship field.
	Relationship Name
	TransactionReference
	Refers To
	TransactionJournal
UnitPrice	Туре
	currency
	Properties
	Create, Filter, Sort, Update
	Description
	Required. The price at which the product is sold.

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

PartnerUnsoldInventoryHistory on page 332

History is available for tracked fields of the object.

PartnerUnsoldInventoryOwnerSharingRule on page 333

Sharing rules are available for the object.

PartnerUnsoldInventoryShare on page 335

Sharing is available for the object.

PtnrlnvltmRecon

Represents a partner reported inventory reconciliation for a product at a location for a particular price. 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	Type reference
	Properties Create, Filter, Group, Sort, Update
	Description Required. The account of the partner whose inventory is reconciled.
	This field is a relationship field.
	Relationship Name Account
	Refers To Account
CurrencyIsoCode	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description Specifies the currency ISO code for the currency fields.
	Possible values are:
	• INR—Indian Rupee
	KWD—Kuwaiti Dinar
	• USD—U.S. Dollar
	The default value is USD.
ExecutionReferenceNumber	Туре
	string
	Properties Create, Filter, Group, idLookup, Nillable, Sort, Update

Field	Details
	Description A reference number in an execution process, such as a data processing engine defintion, that's used to match the partner inventory item reconciliaiton with its related partner inventory item reconciliation traceabilities.
LastSynchronizationDateTime	Type dateTime
	Properties Create, Filter, Nillable, Sort, Update
	Description The most recent data and time when an execution process, such as a data processing engine definition, is launched to reconcile the partner's reported inventory with the calculated inventory.
LocationId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The location ID of the partner's inventory.
	This field is a relationship field.
	Relationship Name Location
	Refers To Location
Name	Type string
	Properties Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description
	The name of the partner's inventory.
ProductId	Type reference
	Properties Create, Filter, Group, Sort, Update
	Description Required. The product ID for which the partner's inventory is reconciled. This field is a relationship field.

Field	Details
	Relationship Name Product
	Refers To Product2
PtnrInvReconId	Type reference
	Properties Create, Filter, Group, Sort
	Description Required. The partner inventory reconciliation ID that's associated with the partner inventory item reconciliation.
	This field is a relationship field.
	Relationship Name PtnrlnvRecon
	Relationship Type Master-detail
	Refers To PtnrlnvRecon (the master object)
QuantityDifference	Type double
	Properties Filter, Nillable, Sort
	Description
	The difference between the total unsold quantity and the reported quantity. This field is a calculated field.
ReportedQuantity	Type double
	Properties Create, Filter, Nillable, Sort, Update
	Description The quantity that's reported by the partner for a product in their inventory. The reported quantity is reconciled against the total unsold quantity.
SourceReferenceRecordId	Туре
	reference
	Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description
	The record that's the source of the partner inventory item reconciliation.
	This field is a polymorphic relationship field.
	Relationship Name
	SourceReferenceRecord
	Refers To PartnerStagedData
Status	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update
	Description Specifies the status of the partner inventory item reconciliation.
	Possible values are:
	• Closed
	• InProgress
	• New
	The default value is New.
TotalUnsoldQuantity	Type double
	Properties Filter, Nillable, Sort
	Description The total unsold quantity of a product in the partner's inventory that's calculated based on the partner's sales transactions. The total unsold quantity is a sum of the unsold quantity in all partner inventory item reconciliation traceability associated with the partner inventory item reconciliation.
	This field is a calculated field.
UnitPrice	Type currency
	Properties
	Create, Filter, Sort, Update
	Description The unit price of the product for which the partner's inventory is reconciled.

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

PtnrlnvltmReconHistory on page 332

History is available for tracked fields of the object.

PtnrlnvltmReconTrace

Represents the source of a partner's calculated unsold inventory on a specific date. 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

C1 - 1 -1

Field	Details
CurrencyIsoCode	Туре
	picklist
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	Specifies the currency ISO code for the currency fields.
	Possible values are:
	• INR—Indian Rupee
	• KWD—Kuwaiti Dinar
	• USD—U.S. Dollar
	The default value is USD.
Name	Туре
	string
	Properties
	Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description
	The name of the partner's inventory.
PartnerUnsoldInventory	^{Id} Type
	reference
	Properties
	Create, Filter, Group, Sort, Update

Field	Details
	Description Required. The partner unsold inventory associated with the partner inventory item reconciliation traceability.
	This field is a relationship field.
	Relationship Name
	PartnerUnsoldInventory
	Refers To PartnerUnsoldInventory
PtnrInvItmReconId	Type reference
	Properties Create, Filter, Group, Sort
	Description Required. The partner inventory item reconciliation associated with the partner inventory item reconciliation traceability.
	Relationship Name PtnrlnvltmRecon
	Relationship Type Master-detail
	Refers To PtnrlnvltmRecon (the master object)
UnsoldQuantity	Type double
	Properties Create, Filter, Sort, Update
	Description Required. The unsold quantity of the partner's inventory.

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

PtnrlnvltmReconTraceHistory on page 332

History is available for tracked fields of the object.

PtnrlnvRecon

Represents the reconciliation of a partner's reported inventory with the partner's calculated unsold inventory on a specific date. 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()

Field	Details
AccountId	Type reference
	Properties Create, Filter, Group, Sort
	Description Required. The account ID of the partner whose inventory is reconciled.
	This field is a relationship field.
	Relationship Name
	Account
	Refers To Account
CurrencyIsoCode	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description Specifies the currency ISO code for the currency fields.
	Possible values are:
	• INR—Indian Rupee
	KWD—Kuwaiti Dinar
	• USD—U.S. Dollar
	The default value is USD.
ExecutionReferenceNumber	Туре
	string
	Properties Create, Filter, Group, idLookup, Nillable, Sort, Update
	Description A reference number in an execution process, such as a data processing engine defintion, that's used to match the partner inventory reconciliaiton with its related partner inventory item reconciliations.

Field	Details
Name	Туре
	string
	Properties
	Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description
	The name of the partner inventory reconcilation record.
OwnerId	Туре
	reference
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	The ID of the user or group that owns the partner inventory reconcilation record.
	This field is a polymorphic relationship field.
	Relationship Name Owner
	Refers To
	Group, User
ReportedAsOfDate	Туре
	date
	Properties
	Create, Filter, Group, Sort
	Description
	Required. The date as of which the partner reported their inventory.
Status	Туре
	picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Specifies the status of the partner inventory reconciliation.
	Possible values are:
	• Closed
	• In ProgressKuwaiti Dinar
	• New

TransitTime

Represents the expected duration for a movement between locations. The business specifies the transit time required for inventory to move between two locations. This object is available in API version 65.0 and later.

Supported Calls

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

Fields

Field	Details
CurrencyIsoCode	Type picklist
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description Specifies the currency ISO code for the currency fields.
	Possible values are:
	• INR—Indian Rupee
	KWD—Kuwaiti Dinar
	• USD—U.S. Dollar
	The default value is USD.
DestinationLocationId	Type reference
	Properties Create, Filter, Group, Sort, Update
	Description Required. The location to which inventory is shipped.
	This field is a relationship field.
	Relationship Name DestinationLocation
	Refers To Location
Duration	Туре
	int
	Properties
	Create, Filter, Group, Sort, Update

Field	Details
	Description Required. The estimated time taken for the inventory to move from the source location to the destination location.
DurationType	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update
	Description Required. Specifies how the duration is measured.
	Possible values are:
	• Days
	• Months
	• Weeks
	The default value is Days.
Name	Туре
	string
	Properties
	Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description The name of the transit time record.
OwnerId	Type reference
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description The owner of the transit time record.
	This field is a polymorphic relationship field.
	Relationship Name Owner
	Refers To Group, User
SourceLocationId	Type reference
	Properties Create, Filter, Group, Sort, Update
	Description Required. The location from which inventory is shipped.

Field	Details
	This field is a relationship field.
	Relationship Name
	SourceLocation
	Refers To
	Location
Status	Туре
	picklist
	Properties
	Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update
	Description
	Required. Specifies the status of the transit time record.
	Possible values are:
	• Active
	• Inactive
	The default value is Active.
UsageType	Туре
	picklist
	Properties
	Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update
	Description
	Required. Specifies the process, feature, or application that uses the record.
	Possible values are:
	• ChannelPartnerInventory
	The default value is ChannelPartnerInventory.

Associated Objects

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

TransitTimeShare on page 335

Sharing is available for the object.

Rebate Management Object in Channel Partner Inventory Tracking

Rebate Management provides access to a standard objects that you can use in Channel Partner Inventory Tracking for the transactions that need to be processed for a rebate program

For more information about the Rebate Management object, refer to this resource.

• TransactionJournal on page 210

CHANNEL PARTNER INVENTORY TRACKING METADATA API TYPES

Metadata API enables you to access some types and feature settings that you can customize in the user interface. For more information about Metadata API and to find a complete reference of existing metadata types, see **Metadata API Developer Guide**.

Flow for Channel Revenue Management

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.

Settings

Represents the organization settings related to a feature. For example, your password policies, session settings and network access controls are all available in the SecuritySettings component type. For more information, see **Settings**.

Flow for Channel Revenue Management

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

Channel Revenue Management exposes additional actionType values for the FlowActionCall Metadata type. For more information on Flow and FlowActionCall Metadata Type, see Flow.

Field Name	Field Type	Description
actionType	InvocableActionType (enumeration of type string)	Required. The action type. Additional valid values only for Channel Revenue Management include:
		 adjustPartnerInvShipAndDebit—Adjusts the point of sale during ship and debit claim processing to a different partner unsold inventory. Available in API version 64.0 and later.
		 adjustPartnerUnsoldInventory— Adjusts the partner unsold inventory quantities and prices. Available in API version 64.0 and later.

Settings

Represents the organization settings related to a feature. For example, your password policies, session settings and network access controls are all available in the SecuritySettings component type. For more information, see **Settings**.

Industries Channel Partner Inventory Settings

Represents the setting for enabling Channel Revenue Management feature like Channel Partner Inventory Tracking.

IndustriesChannelPartnerInventorySettings

Represents the setting for enabling Channel Revenue Management feature like Channel Partner Inventory Tracking.

Parent Type and Manifest Access

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

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

File Suffix and Directory Location

IndustriesChannelPartnerInventorySettings values are stored in the

IndustriesChannelPartnerInventorySettings.settings file in the settings folder. The .settings files are different from other named components, because there is only one settings file for each settings component.

Version

IndustriesChannelPartnerInventorySettings components are available in API version 63.0 and later.

Fields

Field Name	Description
enableChannelPartnerInventoryTracking	Field Type boolean
	Description Indicates whether the Channel Partner Inventory Tracking feature of Channel Revenue Management is enabled (true) or disabled (false) for your org. The default value is false.

Declarative Metadata Sample Definition

The following is an example of an IndustriesChannelPartnerInventorySettings component.

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

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.

DESIGN REGISTRATION STANDARD OBJECTS

Design Registration data model provides objects and fields to enable partners to register designs and capture key sales details through a vendor portal. Use these objects to facilitate design submission, allow channel managers to approve contributions, and enhance sales visibility.

Account

Represents an individual account, which is an organization or person involved with your business (such as customers, competitors, and partners).

DealIndirectPartner

Represents an indirect partner's involvement in a deal. This object is available in API version 63.0 and later.

Lead

Represents a prospect or lead.

Opportunity

Represents an opportunity, which is a sale or pending deal.

OpportunityLineItem

Represents an opportunity line item, which is a member of the list of Product2 products associated with an Opportunity.

Pricebook2

Represents a price book that contains the list of products that your org sells.

Product2

Represents a product that your company sells.

Rebate Management Object in Design Registration

Rebate Management provides access to a standard object that you can use in Design Registration to manage a relationship between accounts.

Account

Represents an individual account, which is an organization or person involved with your business (such as customers, competitors, and partners).

Supported Calls

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

Special Access Rules

Experience Cloud site or Customer Portal users can access their own accounts and any account shared with them.

EDITIONS

Available in: Lightning Experience

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

Fields

Field Name	Details
AccountNumber	Туре
	string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Account number assigned to this account (not the unique, system-generated ID assigned during creation). Maximum size is 40 characters.
AccountSource	Type picklist
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The source of the account record. For example, Advertisement or Trade Show. The source is selected from a picklist of available values, which are set by an administrator. Each picklist value can have up to 40 characters.
ActivityMetricId	Type reference
	Properties Filter, Group, Nillable, Sort
	Description When Einstein Activity Capture with Activity Metrics is enabled, the ID of the related activity metric.
	This field is a relationship field.
	Relationship Name ActivityMetric
	Refers To ActivityMetric
ActivityMetricRollupId	Type reference
	Properties Filter, Group, Nillable, Sort
	Description When Einstein Activity Capture with Activity Metrics is enabled, the ID of the related activity metric rollup.
	This field is a relationship field.

Field Name	Details
	Relationship Name ActivityMetricRollup Refers To
	ActivityMetricRollup
AnnualRevenue	Type currency
	Properties Create, Filter, Nillable, Sort, Update
	Description Estimated annual revenue of the account.
BillingAddress	Type address
	Properties Filter, Nillable
	Description The compound form of the billing address. Read-only. For details on compound address fields, see Address Compound Fields.
BillingCity	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Details for the billing address of this account. Maximum size is 40 characters.
BillingCountry	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Details for the billing address of this account. Maximum size is 80 characters.
BillingCountryCode	Type picklist
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The ISO country code for the account's billing address.

Field Name	Details
BillingGeocodeAccuracy	Type picklist
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description Accuracy level of the geocode for the billing address. For details on geolocation compound fields, see Compound Field Considerations and Limitations.
BillingLatitude	Type double
	Properties
	Create, Filter, Nillable, Sort, Update
	Used with BillingLongitude to specify the precise geolocation of a billing address. Acceptable values are numbers between –90 and 90 with up to 15 decimal places. For details on geolocation compound fields, see Compound Field Considerations and Limitations.
BillingLongitude	Type double
	Properties Create, Filter, Nillable, Sort, Update
	Description Used with BillingLatitude to specify the precise geolocation of a billing address. Acceptable values are numbers between –180 and 180 with up to 15 decimal places. See Compound Field Considerations and Limitations for details on geolocation compound fields.
BillingPostalCode	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Details for the billing address of this account. Maximum size is 20 characters.
BillingState	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Details for the billing address of this account. Maximum size is 80 characters.
BillingStateCode	Туре

Field Name	Details
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description The ISO state code for the account's billing address.
BillingStreet	Type textarea
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Street address for the billing address of this account.
ChannelProgramLevelName	Туре
	string
	Properties
	Group, Nillable
	Description Read only. Name of the channel program level the account has enrolled. If this account has enrolled more than one channel program level, the oldest channel program name is displayed.
ChannelProgramName	Туре
	string
	Properties Group, Nillable
	Description Read only. Name of the channel program the account has enrolled. If this account has enrolled more than one channel program, the oldest channel program name is displayed.
CleanStatus	Type picklist
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	Indicates the record's clean status as compared with Data.com
	Possible values are:
	 AcknowledgedThe label on the account record detail page is Reviewed.
	• Different
	• Inactive
	 Matched—The label on the account record detail page is In Sync.
	• NotFound
	• PendingThe label on the account record detail page is Not Compared.

Field Name	Details
	• SelectMatch
	• Skipped
ConnectionReceivedId	Type reference
	Properties Filter, Group, Nillable, Sort
	Description ID of the PartnerNetworkConnection that shared this record with your organization. This field is available if you enabled Salesforce to Salesforce.
ConnectionSentId	Type reference
	Properties Filter, Group, Nillable, Sort
	Description
	ID of the PartnerNetworkConnection that you shared this record with. This field is available if you enabled Salesforce to Salesforce. This field is supported using API versions earlier than 15.0. In all other API versions, this field's value is null. You can use the new PartnerNetworkRecordConnection object to forward records to connections.
Description	Туре
	textarea
	Properties Create, Nillable, Update
	Description
	Text description of the account. Limited to 32,000 KB.
DunsNumber	Type
	string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description
	The Data Universal Numbering System (D-U-N-S) number is a unique, nine-digit number assigned to every business location in the Dun & Bradstreet database that has a unique, separate, and distinct operation. D-U-N-S numbers are used by industries and organizations around the world as a global standard for business identification and tracking. Maximum size is 9 characters. This field is available on business accounts, not person accounts.
	Note: This field is only available to organizations that use Data.com Prospector or Data.com Clean.

Field Name	Details
Fax	Туре
	phone
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Fax number for the account.
Industry	Type picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	An industry associated with this account. For example, Biotechnology. Maximum size is 40 characters.
IsBuyer	Type boolean
	Properties Defaulted on create, Filter, Group, Sort
	Description Indicates that the account is enabled as a buyer for Lightning B2B Commerce. The default value is false. This field is available in API version 48.0 and later.
	Note: This field is only available to organizations that have the B2B Commerce license enabled.
IsCustomerPortal	Type boolean
	Properties Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether the account has at least one contact enabled to use the org's Experience Cloud site or Customer Portal (true) or not (false). This field is available if Customer Portal is enabled OR digital experiences is enabled.
	If your org is enabled to use Content Security Policy (CSP) features, then this field is visible on the Account object even if those features are later disabled.
	If you change this field's value from true to false, you can disable up to 100 Experience Cloud site or Customer Portal users associated with the account and permanently delete all of the account's site roles and groups. You can't restore deleted site roles and groups.
	Exclude this field when merging accounts.
	This field can be updated in API version 16.0 and later.

Field Name

Details



Tip: We recommend that you update up to 50 contacts simultaneously when changing the accounts on contacts enabled for an Experience Cloud site. We also recommend that you make this update after business hours.

IsPartner

Type

boolean

Properties

Defaulted on create, Filter, Group, Sort, Update

Description

Indicates whether the account has at least one contact enabled to use the org's partner portal (true) or not (false). This field is available if partner relationship management (partner portal) is enabled OR digital experiences is enabled and you have partner portal licenses.

If you change this field's value from true to false, you can disable up to 15 partner portal users associated with the account and permanently delete all of the account's partner portal roles and groups. You can't restore deleted partner portal roles and groups.

Disabling a partner portal user in the Salesforce user interface or the API doesn't change this field's value from true to false.

Even if this field's value is false, you can enable a contact on an account as a partner portal user via the API.

Exclude this field when merging accounts.

This field can be updated in API version 16.0 and later.



Tip: We recommend that you update up to 50 contacts simultaneously when changing the accounts on contacts enabled for an Experience Cloud site. We also recommend that you make this update after business hours.

IsPersonAccount

Type

boolean

Properties

Defaulted on create, Filter, Group, Sort

Description

Read only. Label is **Is Person Account**. Indicates whether this account has a record type of Person Account (true) or not (false).

IsPriorityRecord

Type

boolean

Properties

Defaulted on create, Group

Description

Shows whether the user has marked the account as important (*True*) or not (*False*). The default value is false. Available in API version 60.0 and later.

Field Name	Details
Jigsaw	Туре
	string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description References the ID of a company in Data.com. If an account has a value in this field, it means that the account was imported from Data.com. If the field value is null, the account was not imported from Data.com. Maximum size is 20 characters. Available in API version 22.0 and later. Label is Data.com Key . This field is available on business accounts, not person accounts.
	Important: The Jigsaw field is exposed in the API to support troubleshooting for import errors and reimporting of corrected data. Do not modify the value in the Jigsaw field.
JigsawCompanyId	Type string
	Properties Filter, Group, Nillable, Sort
	Description The ID of the company in reference to Jigsaw.
	Important: The Jigsaw field is exposed in the API to support troubleshooting for import errors and reimporting of corrected data. Don't modify the value in the Jigsaw field.
LastActivityDate	Type date
	Properties
	Filter, Group, Nillable, Sort
	Description
	Value is one of the following, whichever is the most recent:
	Due date of the most recent event logged against the record.
	 Due date of the most recently closed task associated with the record.
LastReferencedDate	Type datetime
	Properties Filter, Nillable, Sort
	Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.

Field Name	Details
LastViewedDate	Туре
	datetime
	Properties
	Filter, Nillable, Sort
	Description The timestamp when the current user last viewed this record or list view. If this value is null, the user might have only accessed this record or list view (LastReferencedDate), but not viewed it.
MasterRecordId	Type reference
	Properties Filter, Group, Nillable, Sort
	Description If this object was deleted as the result of a merge, this field contains the ID of the record that was kept. If this object was deleted for any other reason, or has not been deleted, the value is null.
	This is a relationship field.
	Relationship Name MasterRecord
	Relationship Type Lookup
	Refers To Account
NaicsCode	Type string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description The six-digit North American Industry Classification System (NAICS) code is the standard used by business and government to classify business establishments into industries, according to their economic activity for the purpose of collecting, analyzing, and publishing statistical data related to the U.S. business economy. Maximum size is 8 characters. This field is available on business accounts, not person accounts.
	Note: This field is only available to organizations that use Data.com Prospector or Data.com Clean.
NaicsDesc	Type string
	Properties
	Create, Filter, Group, Nillable, Sort, Update

Field Name	Details
	Description A brief description of an org's line of business, based on its NAICS code. Maximum size is 120 characters. This field is available on business accounts, not person accounts.
	Note: This field is only available to organizations that use Data.com Prospector or Data.com Clean.
Name	Туре
	string
	Properties
	Create, Filter, Group, Sort, Update
	Description Required. Label is Account Name . Name of the account. Maximum size is 255 characters. If the account has a record type of Person Account:
	 This value is the concatenation of the FirstName, MiddleName, LastName, and Suffix of the associated person contact.
	You can't modify this value.
NumberOfEmployees	Type int
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Label is Employees . Number of employees working at the company represented by this account. Maximum size is eight digits.
OperatingHoursId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The operating hours associated with the account. Available only if Field Service is enabled.
	This is a relationship field.
	Relationship Name OperatingHours
	Relationship Type Lookup
	Refers To Operating Hours
OwnerId	Type reference

Field Name	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description The ID of the user who currently owns this account. Default value is the user logged in to the API to perform the create.
	If you have set up account teams in your org, updating this field has different consequences depending on your version of the API:
	 For API version 12.0 and later, sharing records are kept, as they are for all objects.
	For API version before 12.0, sharing records are deleted.
	 For API version 16.0 and later, users must have the "Transfer Record" permission in order to update (transfer) account ownership using this field.
	This is a relationship field.
	Relationship Name Owner
	Relationship Type Lookup
	Refers To User
Ownership	Type picklist
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Ownership type for the account, for example Private, Public, or Subsidiary.
ParentId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description ID of the parent object, if any.
	This is a relationship field.
	Relationship Name Parent
	Relationship Type Lookup
	Refers To Account

Field Name

Details

PersonActionCadenceAssigneeId

Type

reference

Properties

Filter, Group, Nillable, Sort

Description

The ID of the sales rep designated to work the lead through their assigned cadence. This field is available in API version 47.0 and later when the Sales Engagement license is enabled. To see this field, the user also needs the Sales Engagement User or Sales Engagement Quick Cadence Creator user permission set.

This field is a polymorphic relationship field.

Relationship Name

PersonActionCadenceAssignee

Refers To

Group, User

PersonActionCadenceId

Type

reference

Properties

Filter, Group, Nillable, Sort

Description

The ID of the lead's assigned cadence. This field is available in API version 46.0 and later when the Sales Engagement license is enabled. To see this field, the user also needs the Sales Engagement User or Sales Engagement Quick Cadence Creator user permission set.

This is a relationship field.

Relationship Name

PersonActionCadence

Refers To

ActionCadence

PersonActionCadenceState

Type

picklist

Properties

Filter, Group, Nillable, Restricted picklist, Sort

Description

The state of the current action cadence tracker. This field is available in API version 50.0 and later when the Sales Engagement license is enabled. To see this field, the user also needs the Sales Engagement User or Sales Engagement Quick Cadence Creator user permission set.

Possible values are:

- Complete
- Error

Field Name	Details
	• Initializing
	• Paused
	• Processing
	• Running
PersonIndividualId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description
	ID of the data privacy record associated with this person's account. This field is available if you enabled Data Protection and Privacy in Setup.
	Available in API version 42.0 and later.
PersonScheduledResumeDateTime	Type dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The date and time when the action cadence tracker is going to resume after it's paused or on a wait step. This field is available in API version 54.0 and later when the Sales Engagement license is enabled. To see this field, the user also needs the Sales Engagement User or Sales Engagement Quick Cadence Creator user permission set.
Phone	Туре
	phone
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Phone number for this account. Maximum size is 40 characters.
PhotoUrl	Type url
	Properties Filter, Group, Nillable, Sort
	Description
	Path to be combined with the URL of a Salesforce instance (for example, https://yourInstance.salesforce.com/) to generate a URL to request the social network profile image associated with the account. Generated URL returns an HTTP redirect (code 302) to the social network profile image for the account.
	Blank if Social Accounts and Contacts isn't enabled for the org or if Social Accounts and Contacts is disabled for the requesting user.

Field Name	Details
Rating	Туре
	picklist
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The account's prospect rating, for example Hot, Warm, or Cold.
RecordTypeId	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	ID of the record type assigned to this object.
Salutation	Туре
	picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Honorific added to the name for use in letters, etc. This field is available on person accounts.
ShippingAddress	Туре
	address
	Properties
	Filter, Nillable
	Description
	The compound form of the shipping address. Read-only. See Address Compound Fields for details on compound address fields.
ShippingCity	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Details of the shipping address for this account. City maximum size is 40 characters
ShippingCountry	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update

Field Name	Details
	Description
	Details of the shipping address for this account. Country maximum size is 80 characters.
ShippingCountryCode	Туре
	picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The ISO country code for the account's shipping address.
ShippingGeocodeAccuracy	Туре
	picklist
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	Accuracy level of the geocode for the shipping address. For details on geolocation compound
	fields, see Compound Field Considerations and Limitations.
ShippingLatitude	Туре
	double
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	Used with ShippingLongitude to specify the precise geolocation of a shipping address.
	Acceptable values are numbers between –90 and 90 with up to 15 decimal places. For details
	on geolocation compound fields, see Compound Field Considerations and Limitations.
ShippingLongitude	Туре
	double
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	Used with ShippingLatitude to specify the precise geolocation of an address.
	Acceptable values are numbers between –180 and 180 with up to 15 decimal places. For
	details on geolocation compound fields, see Compound Field Considerations and Limitations.
ShippingPostalCode	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Details of the shipping address for this account. Postal code maximum size is 20 characters.

Properties Create, Filter, Group, Nillable, Sort, Update Description Details of the shipping address for this account. State maximum size is 80 characters. ShippingStateCode Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The ISO state code for the account's shipping address. ShippingStreet Type textarea Properties Create, Filter, Group, Nillable, Sort, Update Description The street address of the shipping address for this account. Maximum of 255 characters. Sic Type string Properties Create, Filter, Group, Nillable, Sort, Update Description Standard Industrial Classification code of the company's main business categorization, for example, 57340 for Lilectronics, Maximum of 20 characters. This field is available on business accounts, not person accounts. SicDesc Type string Properties Create, Filter, Group, Nillable, Sort, Update Description A brief description of an org's line of business, based on its SIC code. Maximum length is 80 characters. This field is available on business accounts, not person accounts. Site Type string	Field Name	Details
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string		characters. This field is available on business accounts, not person accounts.
string	Site	Туре
Properties		
· · - p ·		Properties
Create, Filter, Group, Nillable, Sort, Update		·

Field Name	Details
	Description Name of the account's location, for example Headquarters or London. Label is Account Site . Maximum of 80 characters.
TickerSymbol	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The stock market symbol for this account. Maximum of 20 characters. This field is available on business accounts, not person accounts.
Tradestyle	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description A name, different from its legal name, that an org may use for conducting business. Similar to "Doing business as" or "DBA". Maximum length is 255 characters. This field is available on business accounts, not person accounts.
	Note: This field is only available to organizations that use Data.com Prospector or Data.com Clean.
Туре	Type picklist
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Type of account, for example, Customer, Competitor, or Partner.
Website	Type url
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The website of this account. Maximum of 255 characters.
YearStarted	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update

Field Name	Details
	Description
	The date when an org was legally established. Maximum length is 4 characters. This field is available on business accounts, not person accounts.
	Note: This field is only available to organizations that use Data.com Prospector or Data.com Clean.

IsPersonAccount Fields

These fields are the subset of person account fields that are contained in the child person contact record of each person account. If the IsPersonAccount field has the value false, the following fields have a null value and can't be modified. If true, the fields can be modified.

Person account fields only show when person accounts are enabled. Person accounts are disabled by default.

Field Name	Details
FirstName	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	First name of the person for a person account. Maximum size is 40 characters.
LastName	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Last name of the person for a person account. Required if the record type is a person account record type. Maximum size is 80 characters.
MiddleName	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Middle name of the person for a person account. Maximum size is 40 characters.
PersonAssistantName	Туре
	string
	Properties
	Create, Filter, Nillable, Update

Field Name	Details
	Description The person account's assistant name. Label is Assistant . Maximum size is 40 characters.
PersonAssistantPhone	Type phone
	Properties Create, Filter, Nillable, Update
	Description The person account's assistant phone. Label is Asst. Phone . Maximum size is 40 characters.
PersonBirthDate	Type date
	Properties Create, Filter, Nillable, Update
	Description The birthday of the contact associated with this person account. Label is Birthdate . The year portion of the PersonBirthDate field is ignored in filter criteria, including report filters, list view filters, and SOQL queries. For example, the following SOQL query returns person accounts with birthdays later in the year than today:
	SELECT FirstName, LastName, PersonBirthDate FROM Account WHERE Birthdate > TODAY
PersonContactId	Type reference Properties
	Filter, Nillable, Update Description The ID for the contact associated with this person account. Label is Contact ID.
PersonDepartment	Type string
	Properties Create, Filter, Nillable, Update
	Description The department. Label is Department . Maximum size is 80 characters.
PersonEmail	Type email
	Properties Create, Filter, Nillable, Update

Field Name	Details
	Description Email address for this person account. Label is Email .
PersonEmailBouncedDate	Type dateTime
	Properties Create, Filter, Nillable, Update
	Description If bounce management is activated and an email sent to the person account bounces, the date and time the bounce occurred.
PersonEmailBouncedReason	Type string
	Properties Create, Filter, Nillable, Update
	Description If bounce management is activated and an email sent to the person account bounces, the reason the bounce occurred
PersonGenderIdentity	Type picklist
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description The person's internal experience of their gender, which may or may not correspond to the person's designated sex at birth. Label is Gender Identity .
PersonHasOptedOutOfEmail	Type boolean
	Properties Create, Filter, Nillable, Update
	Description Indicates whether the person account has opted out of email (true) or not (false). Label is Email Opt Out .
PersonHomePhone	Type phone
	Properties Create, Filter, Nillable, Update
	Description The home phone number for this person account. Label is Home Phone .

Field Name	Details
PersonLeadSource	Туре
	picklist
	Properties Create, Filter, Nillable, Update
	Description
	The person account's lead source. Label is Lead Source .
PersonMailingAddress	Туре
	address
	Properties
	Filter, Nillable
	Description
	The compound form of the person account mailing address. Read-only. For details on compound address fields, see Address Compound Fields.
PersonMailingCity	Туре
 PersonMailingCountry 	string
PersonMailingPostalCode	Properties Create, Filter, Nillable, Update
• PersonMailingState	Description
	Details about the mailing address for this person account. Labels are Mailing City, Mailing Country, Postal Code , and State . Maximum size for city and country is 40 characters. Maximum size for postal code and state is 20 characters.
PersonMailingCountryCode	• •
• PersonMailingStateCode	picklist
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description
	The ISO country or state code for the mailing address of the person account.
PersonMailingGeocodeAccuracy	Туре
-	picklist
	Properties Retrieve, Query, Restricted picklist, Nillable
	Description
	Accuracy level of the geocode for the person's mailing address. For details on geolocation compound fields, see Compound Field Considerations and Limitations.
PersonMailingLatitude	Туре
	double

Field Name Details Properties Create, Filter, Nillable, Sort, Update Description Used with PersonMailingLongitude to specify the precise geolocation of a person account's mailing address. Acceptable values are numbers between -90 and 90 with up to 15 decimal places. For details on geolocation compound fields, see Compound Field Considerations and Limitations. PersonMailingLongitude Type double **Properties** Create, Filter, Nillable, Sort, Update Description Used with PersonMailingLatitude to specify the precise geolocation of a person account's mailing address. Acceptable values are numbers between -180 and 180 with up to 15 decimal places. For details on geolocation compound fields, see Compound Field Considerations and Limitations. PersonMailingStreet Type textarea **Properties** Create, Filter, Nillable, Update Description The mailing street address for this person account. Label is Mailing Street. Maximum size is 255 characters. PersonMobilePhone Type phone **Properties** Create, Filter, Nillable, Update Description The mobile phone number for this person account. Label is **Mobile**. PersonOtherCity Type string PersonOtherCountry **Properties** PersonOtherPostalCode Create, Filter, Nillable, Update PersonOtherState

Country, Other Zip/Postal Code, and Other State.

Details about the alternate address for this person account. Labels are **Other City**, **Other**

Description

Field Name Details PersonOtherCountryCode Type picklist PersonOtherStateCode **Properties** Create, Filter, Group, Nillable, Sort, Update Description The ISO country or state code for the alternate address of the person account. PersonOtherLatitude Type double **Properties** Create, Filter, Nillable, Sort, Update Description Used with PersonOtherLongitude to specify the precise geolocation of a person account's alternate address. Acceptable values are numbers between -90 and 90 with up to 15 decimal places. For details on geolocation compound fields, see Compound Field Considerations and Limitations. PersonOtherLongitude Type double **Properties** Create, Filter, Nillable, Sort, Update Description Used with PersonOtherLatitude to specify the precise geolocation of a person account's alternate address. Acceptable values are numbers between –180 and 180 with up to 15 decimal places. For details on geolocation compound fields, see Compound Field Considerations and Limitations PersonOtherPhone Type phone **Properties** Create, Filter, Nillable, Update Description The alternate phone number for this person account. Label is **Other Phone**. PersonOtherStreet Type textarea **Properties** Create, Filter, Nillable, Update Description The person account's alternate street address. Label is **Other Street**.

Field Name	Details
PersonPronouns	Туре
	picklist
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description The individual's personal pronouns, reflecting their gender identity. Others can use these pronouns to refer to the individual in the third person. The entry is selected from a picklist of available values, which the administrator sets. Maximum 40 characters. Label is Pronouns .
	Possible values are:
	• He/Him
	• He/They
	• Not Listed
	• She/Her
	• She/They
	• They/Them
PersonReportsToId	Type reference
	Properties Create, Filter, Group, Nillable, Sort Update
	Description ID of the person account or contact that this person account reports to.
	This field doesn't appear if enableReportsToOnPersonAccount in the AccountSettings metadata type is false.
	Available in API version 62.0 and later.
	This is a relationship field.
	Relationship Name PersonReportsTo
	Relationship Type Lookup
	Refers To Contact
PersonTitle	Туре
	string
	Properties Create, Filter, Nillable, Update

Field Name	Details
	Description The person account's title. Label is Title . Maximum size is 80 characters. When converting a lead to a person account, the conversion fails if the lead's Title field contains more than 80 characters.
Suffix	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Name suffix of the person for a person account. Maximum size is 40 characters.



Note: When importing account data, users need the Set Audit Fields upon Record Creation permission to assign values to audit fields such as CreatedDate. Audit fields are automatically updated during API operations unless you set these fields yourself.

Usage

Use this object to query and manage accounts in your org. Client applications can create, update, delete, or query Attachment records associated with an account via the API.

Client applications can also create or update account objects by converting a Lead via the convertLead() call.

If the values in the IsPersonAccount Fields are not null, you can't change IsPersonAccount to false or an error occurs.

Associated Objects

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

AccountChangeEvent (API version 44.0)

Change events are available for the object.

AccountFeed (API version 18.0)

Feed tracking is available for the object.

AccountHistory (API version 11.0)

History is available for tracked fields of the object.

AccountOwnerSharingRule

Sharing rules are available for the object.

AccountShare

Sharing is available for the object.

DealIndirectPartner

Represents an indirect partner's involvement in a deal. This object is available in API version 63.0 and later.

A DealIndirectPartner record can be created manually or through automation when a partner is associated with an opportunity, lead, or account, capturing role and contact information.

Supported Calls

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

Fields

Field	Details
AccountId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The account associated with the indirect partner on the deal.
	This field is a relationship field.
	Relationship Name Account
	Refers To Account
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp when the record was last referenced by the user or system.
LastViewedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description Date and the timestamp when the record was last viewed in the Salesforce UI. Helps monitor user access and engagement.
LeadId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update

record.
for lookup and reference purposes.

Field	Details
	Properties Create, Filter, Group, Sort, Update
	Description Name of the indirect partner participating in the deal. This field captures the business or entity name.
PartnerRoleType	Type picklist
	Properties Create, Filter, Group, Sort, Update
	Description The role played by the indirect partner in the deal. Common values might include Reseller, Distributor, and so on.
PrimaryContactFirstName	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description First name of the primary contact at the partner organization.
PrimaryContactLastName	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description
	Last name of the primary contact at the partner organization.
PrimaryContactName	Type string
	Properties Filter, Group, Nillable, Sort
	Description Full name of the primary contact. This field may be auto-generated by combining first and last names or used for reporting purposes.
PrimaryContactSalutation	Type picklist
	Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Salutation for the primary contact.
	Possible values are:
	• Dr.
	• Mr.
	• Mrs.
	• Ms.
	• Mx.
	• Prof.

Lead

Represents a prospect or lead.

Supported Calls

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

Fields

Field	Details
ActionCadenceAssigneeId	Type reference
	Properties Filter, Group, Nillable, Sort
	Description The ID of the sales rep designated to work the lead through their assigned cadence. This field is available in API version 48.0 and later when the Sales Engagement license is enabled. To see this field, the user also needs the Sales Engagement User or Sales Engagement Quick Cadence Creator user permission set.
ActionCadenceId	Type reference
	Properties Filter, Group, Nillable, Sort

Details Field Description The ID of the lead's assigned cadence. This field is available in API version 48.0 and later when the Sales Engagement license is enabled. To see this field, the user also needs the Sales Engagement User or Sales Engagement Quick Cadence Creator user permission set. ActionCadenceState Type picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort Description The state of the current action cadence tracker. This field is available in API version 50.0 and later when the Sales Engagement license is enabled. To see this field, the user also needs the Sales Engagement User or Sales Engagement Quick Cadence Creator user permission Possible values are: Complete Error Initializing Paused Processing Running ActiveTrackerCount Type int **Properties** Filter, Group, Nillable, Sort Description The number of cadences that are actively running on this lead. This field is available in API version 57.0 and later when the Sales Engagement license is enabled. To see this field, the user also needs the Sales Engagement User or Sales Engagement Quick Cadence Creator user permission set. ActivityMetricId Type reference **Properties** Filter, Group, Nillable, Sort Description When Einstein Activity Capture with Activity Metrics is enabled, the ID of the related activity This field is a relationship field.

This field is available in API version 41.0 and later.

Field	Details
	Relationship Name
	ActivityMetric
	Refers To
	ActivityMetric
ActivityMetricRollupId	Type reference
	Properties Filter, Group, Nillable, Sort
	Description When Einstein Activity Capture with Activity Metrics is enabled, the ID of the related activity metric rollup.
	This field is a relationship field.
	This field is available in API version 41.0 and later.
	Relationship Name ActivityMetricRollup
	Refers To ActivityMetricRollup
Address	Type address
	Properties Filter, Nillable
	Description The compound form of the address. Read-only. For details on compound address fields, see Address Compound Fields.
AnnualRevenue	Type currency
	Properties Create, Filter, Nillable, Sort, Update
	Description Annual revenue for the lead's company.
City	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description City for the lead's address.

Field	Details
CleanStatus	Туре
	picklist
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	Indicates the record's clean status compared with Data.com
	Several values for CleanStatus appear with different labels on the lead record.
	Values include:
	Acknowledged - Reviewed
	• Different
	• Inactive
	• Matched - In Sync
	• NotFound - Not Found
	• Pending - Not Compared
	• SelectMatch - Select Match Skipped
Company	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Required. The lead's company.
	If person account record types have been enabled, and if the value of $Company$ is null, the lead converts to a person account.
CompanyDunsNumber	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description The Data Universal Numbering System (D-U-N-S) number, which is a unique, nine-digit number assigned to every business location in the Dun & Bradstreet database that has a unique, separate, and distinct operation. Industries and companies use D-U-N-S numbers as a global standard for business identification and tracking. Maximum size is 9 characters. This field is only available to organizations that use Data.com Prospector or Data.com Clean.
ConvertedAccountId	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort

Field	Details
	Description
	Object reference ID that points to the account into which the lead converted.
	This is a relationship field.
	Relationship Name ConvertedAccount
	Relationship Type Lookup
	Refers To
	Account
ConvertedContactId	Type reference
	Properties
	Create, Filter, Group, Nillable, Sort
	Description Object reference ID that points to the contact into which the lead converted.
	This is a relationship field.
	Relationship Name ConvertedContact
	Relationship Type
	Lookup
	Refers To Contact
ConvertedDate	Type date
	Properties
	Create, Filter, Group, Nillable, Sort
	Description Date on which this lead was converted.
ConvertedOpportunityId	Type reference
	Properties Create, Filter, Group, Nillable, Sort
	Description Object reference ID that points to the opportunity into which the lead has been converted.
	This is a relationship field.
	Relationship Name ConvertedOpportunity

Field	Details
	Relationship Type Lookup
	Refers To Opportunity
ConnectionReceivedId	Type reference
	Properties Filter, Group, Nillable, Sort
	Description ID of the PartnerNetworkConnection that shared this record with your org. This field is available when Salesforce to Salesforce is enabled.
ConnectionSentId	Type reference
	Properties Filter, Group, Nillable, Sort
	Description ID of the PartnerNetworkConnection that this record is shared with. This field is available Salesforce to Salesforce is enabled. In API version 16.0 and later, this value is null. Use PartnerNetworkRecordConnection object to forward records to connections.
Country	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The lead's country.
CountryCode	Type picklist
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The ISO country code for the lead's address.
CurrencyIsoCode	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update

Field	Details
	Description Available only for organizations with the multicurrency feature enabled. Contains the ISO code for any currency allowed by the organization.
DandBCompanyId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Reference ID to a Dun & Bradstreet® company record, associated with an account added from Data.com.
	Relationship Name DandbCompany
	Refers To DandbCompany
Description	Type textarea
	Properties Create, Nillable, Update
	Description The lead's description.
Division	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update
	Description A logical segment of your organization's data. For example, if your company is organized into different business units, you could create a division for each business unit, such as North America, Healthcare, or Consulting. Available only when the Division permission is enabled.
Email	Type email
	Properties Create, Filter, Group, idLookup, Nillable, Sort, Update
	Description The lead's email address.
EmailBouncedDate	Type dateTime

Field	Details
	Properties Filter, Nillable, Sort, Update
	Description If bounce management is activated and an email sent to the lead bounced, the date and time of the bounce. Email bounce functionality isn't triggered by record updates, including updates to this field.
EmailBouncedReason	Type string
	Properties Filter, Group, Nillable, Sort, Update
	Description If bounce management is activated and an email sent to the lead bounced, the reason for the bounce. Email bounce functionality isn't triggered by record updates, including updates to this field.
ExportStatus	Type picklist
	Properties Filter, Restricted picklist, Sort
	Description Derived field for the record map for Partner Connect. The export status of this opportunity to the partner's connected org. To see this field, enable Partner Connect and add the Export Vendor Records to an Authorized Partner Org user permission to the cosell export user. See Set Up Partner Connect as a Vendor in Salesforce Help. Available in API version 62.0 and later.
Fax	Type phone
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The lead's fax number.
FirstCallDateTime	Type datetime
	Properties Filter, Nillable, Sort
	Description The date and time of the first call placed to the lead. This field is available in API version 48.0 when the Sales Engagement license is enabled. To see this field, the user also needs the Sales Engagement User or Sales Engagement Quick Cadence Creator user permission set.

Field	Details
FirstEmailDateTime	Type datetime
	Properties Filter, Nillable, Sort
	Description The date and time of the first email sent to the lead. This field is available in API version 48.0 when the Sales Engagement license is enabled. To see this field, the user also needs the Sales Engagement User or Sales Engagement Quick Cadence Creator user permission set.
FirstName	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The lead's first name up to 40 characters.
GeocodeAccuracy	Type picklist
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description Accuracy level of the geocode for the address. For details on geolocation compound fields, see Compound Field Considerations and Limitations.
GenderIdentity	Type picklist
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description The lead's internal experience of their gender, which may or may not correspond to their designated sex at birth.
HasOptedOutOfEmail	Type boolean
	Properties Create, Defaulted on create, Filter, Update
	Description Indicates whether the lead doesn't want to receive email from Salesforce (true) or does (false). Label is Email Opt Out .
HasOptedOutOfFax	Type boolean

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether the lead doesn't want to receive faxes from Salesforce (true) or does (false). Label is FaxOpt Out .
IndividualId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description ID of the data privacy record associated with this lead. This field is available if you enabled Data Protection and Privacy in Setup.
	Relationship Name Individual
	Relationship Type Lookup
	Refers To Individual
Industry	Type picklist
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Industry in which the lead works.
IsConverted	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort
	Description Indicates whether the lead has been converted (true) or not (false). Label is Converted .
IsDeleted	Type boolean
	Properties Defaulted on create, Filter
	Description Indicates whether the object has been moved to the Recycle Bin (true) or not (false). Label is Deleted.

Field	Details
IsPriorityRecord	Type boolean
	Properties Defaulted on create, Group
	Description Shows whether the user has marked the lead as important (<i>True</i>) or not (<i>False</i>). The default value is false. Available in API version 59.0 and later.
IsUnreadByOwner	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description If true, lead has been assigned, but not yet viewed. See Unread Leads for more information. Label is Unread By Owner .
Jigsaw	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description References the ID of a contact in Data.com. If a lead has a value in this field, it means that a contact was imported as a lead from Data.com. If the contact (converted to a lead) wasn't imported from Data.com, the field value is null. Maximum size is 20 characters. Available in API version 22.0 and later. Label is Data.com Key.
	Important: The Jigsaw field is exposed in the API to support troubleshooting for import errors and reimporting of corrected data. Don't modify the value in the Jigsaw field.
JigsawContactId	Type string
	Properties Filter, Group, Nillable, Sort
	Description The ID of the contact in reference to Jigsaw.
	Important: The Jigsaw field is exposed in the API to support troubleshooting for import errors and reimporting of corrected data. Don't modify the value in the Jigsaw field.
LastActivityDate	Type date

Field	Details
	Properties Filter, Group, Nillable, Sort
	Description Value is the most recent of either:
	 Due date of the most recent event logged against the record. Due date of the most recently closed task associated with the record.
LastName	Type
	string
	Properties Create, Filter, Group, Sort, Update
	Description Required. Last name of the lead up to 80 characters.
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	Type datetime
	Properties Filter, Nillable, Sort
	Description The timestamp when the current user last viewed this record or list view. If this value is null, the user might have only accessed this record or list view (LastReferencedDate) but not viewed it.
Latitude	Type double
	Properties Create, Filter, Nillable, Sort, Update
	Description Used with Longitude to specify the precise geolocation of an address. Acceptable values are numbers between –90 and 90 up to 15 decimal places. For details on geolocation compound fields, see Compound Field Considerations and Limitations
LeadSource	Type picklist

Field	Details
	Properties Control of the Control of
	Create, Filter, Group, Nillable, Sort, Update
	Description The origin or source of the lead.
Longitude	Type double
	Properties Create, Filter, Nillable, Sort, Update
	Description Used with Latitude to specify the precise geolocation of an address. Acceptable values are numbers between –180 and 180 up to 15 decimal places. For details on geolocation compound fields, see Compound Field Considerations and Limitations.
MasterRecordId	Туре
	reference
	Properties
	Filter, Group, Nillable, Sort
	Description If this record was deleted as the result of a merge, this field contains the ID of the record that was kept. If this record was deleted for any other reason, or hasn't been deleted, the value is null.
	When using Apex triggers to determine which record was deleted in a merge event, this field's value is the ID of the record that remains in Trigger.old. In Trigger.new, the value is null.
	This is a relationship field.
	Relationship Name MasterRecord
	Relationship Type Lookup
	Refers To Lead
MiddleName	Туре
	string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The lead's middle name. Maximum size is 40 characters.
MobilePhone	Type phone

Field	Details
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The lead's mobile phone number.
Name	Туре
	string
	Properties
	Filter, Group, Sort
	Description
	Concatenation of FirstName, MiddleName, LastName, and Suffix up to 203 characters, including whitespaces.
NumberOfEmployees	Туре
	int
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description Number of employees at the lead's company. Label is Employees .
OwnerId	Type reference
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	ID of the lead's owner.
	This is a polymorphic relationship field.
	Relationship Name
	Owner
	Relationship Type Lookup
	Refers To
	Group, User
PartnerAccountId	Туре
	reference
	Properties
	Filter, Group, Nillable, Sort

Field	Details
	Description ID of the partner account for the partner user that owns this lead. Available if Partner Relationship Management is enabled or if digital experiences is enabled and you have partner portal licenses.
	In API version 16.0 and later, the Partner Account field is set to the appropriate account for the partner user that owns the lead. If the owner of the lead isn't a partner user, this field has no value.
Phone	Type phone
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description The lead's phone number.
PhotoUrl	Type url
	Properties Filter, Group, Nillable, Sort
	Description
	Path to be combined with the URL of a Salesforce instance (<i>Example</i> : https://yourInstance.salesforce.com/) to generate a URL to request the social network profile image associated with the lead. Generated URL returns an HTTP redirect (code 302) to the social network profile image for the lead.
PostalCode	Type string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description Postal code for the address of the lead. Label is Zip/Postal Code .
Pronouns	Type picklist
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description The lead's personal pronouns, reflecting their gender identity. Others can use these pronouns to refer to the lead in the third person. The entry is selected from a picklist of available values, which the administrator sets. Maximum 40 characters.
	Possible values are:
	• He/Him

Field	Details
	• He/They
	• Not Listed
	• She/Her
	• She/They
	• They/Them
Rating	Туре
	picklist
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description
	Rating of the lead.
RecordTypeId	Type reference
	Properties Create, Filter, Nillable, Update
	Description ID of the record type assigned to this object.
Salutation	Type picklist
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Salutation for the lead.
ScheduledResumeDateTime	Type dateTime
	Properties Filter, Nillable, Sort
	Description The date and time when the action cadence tracker is going to resume after it's paused or on a wait step. This field is available in API version 54.0 and later when the Sales Engagement license is enabled. To see this field, the user also needs the Sales Engagement User or Sales Engagement Quick Cadence Creator user permission set.
ScoreIntelligenceId	Type reference
	Properties Filter, Group, Nillable, Sort

Field	Details
	Description The ID of the intelligent field record that contains lead score.
State	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description State for the address of the lead.
StateCode	Type
	picklist Proportion
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description
	The ISO state code for the lead's address.
Status	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Status code for this converted lead. Status codes are defined in Status and represented in the API by the LeadStatus object.
Street	Type textarea
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Street number and name for the address of the lead.
Suffix	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The lead's name suffix. Maximum size is 40 characters.
Title	Type string

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Title for the lead, such as CFO or CEO. The maximum size is 128 characters. When converting a lead to a person account, the conversion fails if the lead Title field contains more than 80 characters.
Website	Type url
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Website for the lead.



Note: When importing lead data, users need the Set Audit Fields upon Record Creation permission to assign values to audit fields such as CreatedDate. Audit fields are automatically updated during API operations unless you set these fields yourself.

Converted Leads

Leads have a special state to indicate that they've been converted into an account, a contact, and an opportunity. Your client application can convert leads via the <code>convertLead()</code> call. Users can also convert leads in Salesforce. After a lead has been converted, it's read only. However, you can query converted lead records. Only users with the View and Edit Converted Leads permission can update converted lead records.

Leads have several fields that indicate their converted status. These special fields are set when converting the lead in the user interface.

- ConvertedAccountId
- ConvertedContactId
- ConvertedDate
- ConvertedOpportunityId
- IsConverted
- Status

Unread Leads

Leads have a special state to indicate that they haven't been viewed or edited by the lead owner. In Salesforce, it's helpful for users to know which leads have been assigned to them but that they haven't touched yet. IsUnreadByOwner is true if the lead owner hasn't yet viewed or edited the lead, and false if the lead owner has viewed or edited the lead at least one time.

Lead Status Picklist

Each Status value corresponds to either a converted or unconverted status in the lead status picklist, as defined in the user interface. To obtain the lead status values in the picklist, a client application can query LeadStatus.

You can't convert a lead via the API by changing Status to one of the converted lead status values. When you convert qualified leads into an account, contact, and opportunity, you can select one of the converted status types for the lead. Leads with a converted status type are no longer available in the Leads tab, although you can include them in reports.

Usage

If lead data is imported and you need to set the value for an audit field, such as CreatedDate, contact Salesforce Support. Audit fields are automatically updated during API operations unless you request to set these fields yourself.

To update a lead or to convert one with convertLead(), log in to your client application with the Edit permission on leads.

When you create, update, or upsert a lead, your client application can have the lead assigned to multiple user records based on assignment rules that have been configured in Salesforce.

To use this feature, your client application needs to set either of these options (but not both) in the AssignmentRuleHeader used in create or update:

Field	Field Type	Details
assignmentRuleId	reference	ID of the assignment rule to use. Can be an inactive assignment rule. If unspecified and useDefaultRule is true, then the default assignment rule is used.
		To find the ID for a given assignment rule, query the AssignmentRule object (specifying RuleType="leadAssignment"), iterate through the returned AssignmentRule records, find the one you want to use, retrieve its ID, and then specify its ID in this field in the AssignmentRuleHeader.
useDefaultRule	boolean	Specifies whether to use the default rule for rule-based assignment (true) or not (false). Default rules are assigned in the user interface.

Java Sample

The following Java sample shows how to automatically assign a newly created lead.

```
import com.sforce.soap.enterprise.Connector;
import com.sforce.soap.enterprise.EnterpriseConnection;
import com.sforce.ws.ConnectionException;
import com.sforce.ws.ConnectorConfig;
import com.sforce.soap.enterprise.sobject.Lead;
import com.sforce.soap.enterprise.QueryResult;
import com.sforce.soap.enterprise.SaveResult;
import com.sforce.soap.enterprise.Sobject.SObject;

public class LeadAssignment {
    static final String USERNAME = "REPLACE USER NAME";
    static final String PASSWORD = "REPLACE PASSWORD";
    static EnterpriseConnection connection;
    static LeadAssignment _leadAssignment;
```

```
// Main
public static void main(String[] args)
    // Establish connection and login
    ConnectorConfig config = new ConnectorConfig();
    config.setUsername(USERNAME);
    config.setPassword(PASSWORD);
    try {
        connection = Connector.newConnection(config);
        System.out.println("Logged in, endpoint: " + config.getAuthEndpoint());
    } catch (ConnectionException e1) {
        e1.printStackTrace();
    // Create lead
    leadAssignment = new LeadAssignment();
    try {
        _leadAssignment.CreateLead();
    } catch (Exception e) {
        e.printStackTrace();
    // Logout
    try {
        connection.logout();
        System.out.println("Logged out");
    } catch (ConnectionException ce) {
        ce.printStackTrace();
    }
}
public void CreateLead() throws ConnectionException
    // Create a new Lead and assign various properties
    Lead lead = new Lead();
    lead.setFirstName("Joe");
    lead.setLastName("Smith");
    lead.setCompany("ABC Corporation");
    lead.setLeadSource("API");
    // The lead assignment rule will assign any new leads that
    // have "API" as the LeadSource to a particular user
    // In this sample we will look for a particular rule and if found
    // use the id for the lead assignment. If it is not found we will
    // instruct the call to use the current default rule. You can't use
    // both of these values together.
    QueryResult qr = connection.query("SELECT Id FROM AssignmentRule WHERE Name = " +
                         "'Mass Mail Campaign' AND SobjectType = 'Lead'");
    if (qr.getSize() == 0) {
        connection.setAssignmentRuleHeader(null, true);
        connection.setAssignmentRuleHeader(gr.getRecords()[0].getId(), false);
```

```
}
    // Every operation that results in a new or updated lead will
    // use the specified rule until the header is removed from the
    // connection.
    SaveResult[] sr = connection.create(new SObject[] {lead});
    for (int i=0;i<sr.length;i++) {</pre>
        if (sr[i].isSuccess()) {
            System.out.println("Successfully created lead with id of: " +
                               sr[i].getId() + ".");
        } else {
            System.out.println("Error creating lead: " +
                               sr[i].getErrors()[0].getMessage());
        }
    }
    // This call effectively removes the header, the next lead will
    // be assigned to the default lead owner.
    connection.clearAssignmentRuleHeader();
}
```

C# Sample

The following C# sample shows how to automatically assign a newly created lead.

```
using System;
using System.Collections.Generic;
using System.Linq;
using System. Text;
using System. Threading. Tasks;
using System.ServiceModel;
using LeadSample.sforce;
namespace LeadSample
   class LeadAssignment
       private static SoapClient client;
       private static SoapClient apiClient;
       private static SessionHeader header;
        private static LoginResult loginResult;
        private static readonly string Username = "REPLACE USERNAME";
        private static readonly string Password = "REPLACE PASSWORD AND SECURITY TOKEN";
        // Create the proxy binding and login
        private LeadAssignment()
        {
            client = new SoapClient();
            try
                loginResult = client.login(null, Username, Password);
```

```
catch (Exception e)
        Console.WriteLine("Unexpected login error: " + e.Message);
        Console.WriteLine(e.StackTrace);
        return;
    // Access API endpoint and create new client
    header = new SessionHeader();
    header.sessionId = loginResult.sessionId;
    apiClient = new SoapClient("Soap", loginResult.serverUrl);
}
[STAThread]
static void Main(string[] args)
   LeadAssignment leadAssignment = new LeadAssignment();
    try
    {
        leadAssignment.CreateLead();
    catch (Exception e)
        Console.WriteLine(e.Message);
       Console.WriteLine(e.StackTrace);
        Console.WriteLine(e.InnerException);
    // logout
    client.logout(header);
}
public void CreateLead()
    // Create a new Lead and assign various properties
    Lead lead = new Lead();
    lead.FirstName = "John";
    lead.LastName = "Brown";
    lead.Company = "ABC Corporation";
    lead.LeadSource = "Advertisement";
    // Setting the lead source for a pre-existing lead assignment rule. This
    // rule was created outside of this sample and will assign any new leads
    // that have "Advertisement" as the LeadSource to a particular user.
    // Create the assignment rule header and add it to the proxy binding
    AssignmentRuleHeader arh = new AssignmentRuleHeader();
    // In this sample we will look for a particular rule and if found
    // use the id for the lead assignment. If it is not found we will
    // instruct the call to use the current default rule. Both these
    // values can't be used together.
    QueryResult qr = null;
    string query = "SELECT Id FROM AssignmentRule WHERE Name = " +
        "'Mass Mail Campaign' AND SobjectType = 'Lead'";
    try
```

}

```
{
   LimitInfo[] limitArray = apiClient.query(
       header, // sessionheader
       null, // queryoptions
       null, // mruheader
       null, // packageversionheader
       query, // SOQL query
       out qr);
catch (Exception e)
   Console.WriteLine("Unexpected query error: " + e.Message);
   Console.WriteLine(e.StackTrace);
if (qr.size == 0)
   arh.useDefaultRule = true;
else
{
   arh.assignmentRuleId = qr.records[0].Id;
// Create the lead using our Assignment Rule header
LimitInfo[] li;
SaveResult[] sr;
apiClient.create(
   header, // sessionheader
   arh, // assignmentruleheader
   null, // mruheader
   null, // allowfieldtrunctionheader
   null, // disablefeedtrackingheader
   null, // streamingenabledheader
   null, // allornoneheader
   null, // duplicateruleheader
   null, // localeoptions
   null, // debuggingheader
   null, // packageversionheader
   null, // emailheader
   new sObject[] { lead },
   out li,
   out sr);
foreach (SaveResult s in sr)
   if (s.success)
       Console.WriteLine("Successfully created Lead with ID: {0}", s.id);
    }
   else
       Console.WriteLine("Error creating Lead: {0}", s.errors[0].message);
   }
}
```

```
}
}
```

Associated Objects

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

LeadChangeEvent (API version 44.0)

Change events are available for the object.

LeadFeed (API version 18.0)

Feed tracking is available for the object.

LeadHistory

History is available for tracked fields of the object.

LeadOwnerSharingRule

Sharing rules are available for the object.

LeadShare

Sharing is available for the object.

Opportunity

Represents an opportunity, which is a sale or pending deal.

Supported Calls

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

Fields

Field	Field Type
AccountId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description ID of the account associated with this opportunity.
	This is a relationship field.
	Relationship Name Account
	Relationship Type Lookup

Field	Field Type	
	Refers To	
	Account	
ActivityMetricId	Туре	
	reference	
	Properties Filter, Group, Nillable, Sort	
	Description When Einstein Activity Capture with Activity Metrics is enabled, the ID of the related activity metric.	
	This field is a relationship field.	
	Relationship Name ActivityMetric	
	Refers To ActivityMetric	
ActivityMetricRollupId	Type reference	
	Properties Filter, Group, Nillable, Sort	
	Description When Einstein Activity Capture with Activity Metrics is enabled, the ID of the related activity metric rollup.	
	This field is a relationship field.	
	Relationship Name ActivityMetricRollup	
	Refers To ActivityMetricRollup	
AgeInDays	Type int	
	Properties	
	Aggregate, Filter, Group, Nillable, Sort	
	Description	
	The number of days since the opportunity was created, calculated by the current date minus the created_date field. This field is available in API version 52.0 and later if you enabled Pipeline Inspection.	
Amount	Туре	
	currency	

Field	Field Type
	Properties Create, Filter, Nillable, Sort, Update
	Description Estimated total sale amount. For opportunities with products, the amount is the sum of the related products. Any attempt to update this field, if the record has products, will be ignored. The update call will not be rejected, and other fields will be updated as specified, but the Amount will be unchanged.
CampaignId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description ID of a related Campaign. This field is defined only for those organizations that have the campaign feature Campaigns enabled. The User must have read access rights to the cross-referenced Campaign object in order to create or update that campaign into this field on the opportunity.
	This is a relationship field.
	Relationship Name Campaign
	Relationship Type Lookup
	Refers To Campaign
CloseDate	Type date
	Properties Create, Filter, Group, Sort, Update
	Description Required. Date when the opportunity is expected to close.
ConnectionReceivedId	Type reference
	Properties Filter, Group, Nillable, Sort
	Description ID of the PartnerNetworkConnection that shared this record with your organization. This field is available if you enabled Salesforce to Salesforce.
ConnectionSentId	Type reference

Field Type

Properties

Filter, Group, Nillable, Sort

Description

ID of the PartnerNetworkConnection that you shared this record with. This field is available if you enabled Salesforce to Salesforce. This field is supported using API versions earlier than 15.0. In all other API versions, this field's value is null. You can use the new PartnerNetworkRecordConnection object to forward records to connections.

ContactId

Type

reference

Properties

Create, Filter, Group, Nillable, Sort

Description

ID of the contact associated with this opportunity, set as the primary contact. Read-only field that is derived from the opportunity contact role, which is created at the same time the opportunity is created. This field can only be populated when it's created, and can't be updated. To update the value in this field, change the IsPrimary flag on the OpportunityContactRole associated with this opportunity. Available in API version 46.0 and later.

ContractId

Type

reference

Properties

Create, Filter, Group, Nillable, Sort, Update

Description

ID of the contract that's associated with this opportunity.

This is a relationship field.

Relationship Name

Contract

Relationship Type

Lookup

Refers To

Contract

CurrencyIsoCode

Type

picklist

Properties

Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update

Description

Available only for organizations with the multicurrency feature enabled. Contains the ISO code for any currency allowed by the organization.

Field	Field Type
	If the organization has multicurrency and a Pricebook2 is specified on the opportunity (that is, the Pricebook2Id field is not blank), then the currency value of this field must match the currency of the PricebookEntry records that are associated with any opportunity line items it has.
Description	Туре
	textarea
	Properties Create, Nillable, Update
	Description Text description of the opportunity. Limit: 32,000 characters.
ExpectedRevenue	Type currency
	Properties
	Filter, Nillable, Sort
	Description
	Read-only field that is equal to the product of the opportunity Amount field and the Probability. You can't directly set this field, but you can indirectly set it by setting the Amount or Probability fields.
ExportStatus	Type picklist
	Properties Filter, Restricted picklist, Sort
	Description Derived field for the record map for Partner Connect. The export status of this opportunity to the partner's connected org. To see this field, enable Partner Connect and add the Export Vendor Records to an Authorized Partner Org user permission to the cosell export user. See Set Up Partner Connect as a Vendor in Salesforce Help. Available in API version 62.0 and later.
Fiscal	Туре
	string
	Properties Filter, Group, Nillable, Sort
	Description If fiscal years are not enabled, the name of the fiscal quarter or period in which the opportunity CloseDate falls. Use YYYY Q format, for example, '2006 1' for first quarter of 2006.
FiscalQuarter	Type int
	Properties
	Filter, Group, Nillable, Sort

Field	Field Type	
	Description Represents the fiscal quarter. Valid values are 1, 2, 3, or 4.	
FiscalYear	Type int	
	Properties Filter, Group, Nillable, Sort	
	Description Represents the fiscal year, for example, 2006.	
ForecastCategory	Type picklist	
	Properties	
	Filter, Group, Restricted picklist, Sort	
	Description Restricted picklist field. It is implied, but not directly controlled, by the StageName field. You can override this field to a different value than is implied by the StageName value. The values of this field are fixed enumerated values. The field labels are localized to the language of the user performing the operation, if localized versions of those labels are available for that language in the user interface.	
	In API version 12.0 and later, the value of this field is automatically set based on the value of the ForecastCategoryName and can't be updated any other way. The field properties Create, Defaulted on create, Nillable, and Update are not available in version 12.0.	
	Possible values are:	
	• BestCase	
	• Closed	
	• Forecast	
	• MostLikely	
	• Omitted	
	• Pipeline	
ForecastCategoryName	Type picklist	
	Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update	
	Description The name of the forecast category. It is implied, but not directly controlled, by the StageName field. You can override this field to a different value than is implied by the StageName value. Available in API version 12.0 and later.	
	Possible values are:	
	• Best Case	

Field Field Type Closed Commit Most Likely Omitted Pipeline HasOpenActivity Type boolean **Properties** Defaulted on create, Group, Description Indicates whether an opportunity has an open event or task (true) or not (false). Available in API version 35.0 and later. HasOpportunityLineItem Type boolean **Properties** Defaulted on create, Filter, Group, Sort Description Read-only field that indicates whether the opportunity has associated line items. A value of true means that Opportunity line items have been created for the opportunity. An opportunity can have opportunity line items only if the opportunity has a price book. The opportunity line items must correspond to PricebookEntry objects that are listed in the opportunity Pricebook2. However, you can insert opportunity line items on an opportunity that does not have an associated Pricebook2. For the first opportunity line item that you insert on an opportunity without a Pricebook2, the API automatically sets the Pricebook2Id field, if the opportunity line item corresponds to a PricebookEntry in an active Pricebook2 that has a CurrencyIsoCode field that matches the CurrencyIsoCode field of the opportunity. If the Pricebook2 is not active or the CurrencyIsoCode fields do not match, then the API returns an error. You can't update the Pricebook2Id or PricebookId fields if opportunity line items exist on the Opportunity. You must delete the line items before attempting to update the PricebookId field. HasOverdueTask Type boolean **Properties**

Indicates whether an opportunity has an overdue task (true) or not (false). Available in

Defaulted on create, Group,

API version 35.0 and later.

Description

Field	Field Type
IqScore	Туре
	int
	Properties
	Aggregate, Filter, Group, Nillable, Sort
	Description The likelihood, measured on a scale of 1 to 99, that an opportunity will be won. Einstein Opportunity Scoring must be enabled. Available in API version 41.0 and later. Label is Opportunity Score .
IsClosed	Type boolean
	Properties
	Defaulted on create, Filter, Group, Sort
	Description
	Directly controlled by StageName. You can query and filter on this field, but you can't directly set it in a create, upsert, or update request. It can only be set via StageName. Label is Closed .
IsDeleted	Туре
	boolean
	Properties
	Defaulted on create, Filter
	Description Indicates whether the object has been moved to the Recycle Bin (true) or not (false). Label is Deleted .
IsExcludedFromTerritory2Filter	Type
	boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description Used for Filter-Based Opportunity Territory Assignment (Pilot in Spring '15 / API version 33). Indicates whether the opportunity is excluded ($True$) or included ($False$) each time the APEX filter is executed.
IsPriorityRecord	Туре
	boolean
	Properties Defaulted on create, Group
	Description
	Shows whether the user has marked the opportunity as important (<i>True</i>) or not (<i>False</i>). The default value is false. Available in API version 53.0 and later.

Field	Field Type
IsPrivate	Туре
	boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description If true, only the opportunity owner, users above that role in the hierarchy, and admins can view the opportunity or query it via the API. When you mark opportunities as private, opportunity teams, opportunity splits, and sharing are removed. Label is Private . The default value is False.
IsSplit	Type boolean
	Properties Defaulted on create, Filter, Group, Sort
	Description
	Read-only field that indicates whether credit for the opportunity is split between opportunity team members. Label is IsSplit. This field is available in versions 14.0 and later for organizations that enabled Opportunity Splits during the pilot period.
	This field should not be used. However, it's documented for the benefit of pilot customers who find references to IsSplit in code.
IsWon	Type boolean
	Properties Defaulted on create, Filter, Group, Sort
	Description
	Directly controlled by StageName. You can query and filter on this field, but you can't directly set the value. It can only be set via StageName. Label is Won .
LastActivityDate	Type date
	Properties Filter, Group, Nillable, Sort
	Description
	Value is one of the following, whichever is the most recent:
	 Due date of the most recent event logged against the record.
	 Due date of the most recently closed task associated with the record.
LastActivityInDays	Type int
	Properties
	Aggregate, Filter, Group, Nillable, Sort

Field

Field Type

Description

The number of days since the last completed event or task for the record, calculated by the current date minus the last_activity field. If the last_activity field is null, this field is available in API version 52.0 and later if you enabled Pipeline Inspection.

LastAmountChangedHistoryId

Type

reference

Properties

Filter, Group, Nillable, Sort

Description

ID of the OpportunityHistory record that contains information about when the opportunity Amount field was last updated in Winter '21 or later. Information includes the date and time of the change and the user who made the change. Available in API version 50.0 and later.

This is a relationship field.

Relationship Name

LastAmountChangedHistory

Relationship Type

Lookup

Refers To

OpportunityHistory

LastCloseDateChangedHistoryId

Type

reference

Properties

Filter, Group, Nillable, Sort

Description

ID of the OpportunityHistory record that contains information about when the opportunity Close Date field was last updated in Winter '21 or later. Information includes the date and time of the change and the user who made the change. Available in API version 50.0 and later.

This is a relationship field.

Relationship Name

LastCloseDateChangedHistory

Relationship Type

Lookup

Refers To

OpportunityHistory

LastReferencedDate

Type

datetime

Field	Field Type
	Properties Filter, Nillable, Sort
	Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.
LastStageChangeDate	Туре
	datetime
	Properties
	Aggregate, Filter, Nillable, Sort
	Description
	The date of the last change made to the Stage field on this opportunity record. This field is available in API version 52.0 and later.
LastStageChangeInDays	Туре
	int
	Properties
	Aggregate, Filter, Group, Nillable, Sort
	Description The number of days since the last change was made to the Stage field on the opportunity record, calculated by the current date minus the last_stage_change_date field. If the last_stage_change_date is null, then this field contains the value for AgeInDays. This field is available in API version 52.0 and later if you enabled Pipeline Inspection.
LastViewedDate	Туре
	datetime
	Properties Filter, Nillable, Sort
	Description The timestamp when the current user last viewed this record or list view. If this value is null, the user might have only accessed this record or list view (LastReferencedDate) but not viewed it.
LeadSource	Type
	picklist
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description
	Source of this opportunity, such as Advertisement or Trade Show.

Field	Field Type
Name	Туре
	string
	Properties
	Create, Filter, Group, idLookup, Sort, Update
	Description
	Required. A name for this opportunity. Limit: 120 characters.
NextStep	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Description of next task in closing opportunity. Limit: 255 characters.
OwnerId	Туре
	reference
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	ID of the User who has been assigned to work this opportunity.
	If you update this field, the previous owner's access becomes Read Only or the access specified in your organization-wide default for opportunities, whichever is greater.
	If you have set up opportunity teams in your organization, updating this field has different consequences depending on your version of the API:
	 For API version 12.0 and later, sharing records are kept, as they are for all objects. (All previous opportunity team members are kept on the opportunity team.)
	 For API version before 12.0, sharing records are deleted. (All previous opportunity team members are removed from the opportunity team.)
	 For API version 16.0 and later, users must have the Transfer Record permission in order to update (transfer) account ownership using this field.
	This is a relationship field.
	Relationship Name
	Owner ·
	Relationship Type
	Lookup
	Refers To
	User
PartnerAccountId	Туре
	reference

Field

Field Type

Properties

Filter, Group, Nillable, Sort

Description

ID of the partner account for the partner user that owns this opportunity. Available if Partner Relationship Management is enabled or if digital experiences is enabled and you have partner portal licenses.

If you are uploading opportunities using API version 15.0 or earlier, and one of the opportunities in the batch has a partner user as the owner, the Partner Account field on all opportunities in the batch is set to that partner user's account regardless of whether the partner user is the owner. In version 16.0, the Partner Account field is set to the appropriate account for the partner user that owns the opportunity. If the owner of the opportunity is not a partner user, this field remains empty.

Pricebook2Id

Type

reference

Properties

Create, Defaulted on create, Filter, Group, Nillable, Sort, Update

Description

ID of a related Pricebook2 object. The Pricebook2Id field indicates which Pricebook2 applies to this opportunity. The Pricebook2Id field is defined only for those organizations that have products enabled as a feature. You can specify values for only one field (Pricebook2Id or PricebookId)—not both fields. For this reason, both fields are declared nillable.

This is a relationship field.

Relationship Name

Pricebook2

Relationship Type

Lookup

Refers To

Pricebook2

PricebookId

Type

reference

Properties

Create, Defaulted on create, Filter, Nillable, Update

Description

Unavailable as of version 3.0. As of version 8.0, the Pricebook object is no longer available. Use the Pricebook2Id field instead, specifying the ID of the Pricebook2 record.

Probability

Type

percent

Field

Field Type

Properties

Create, Defaulted on create, Filter, Nillable, Sort, Update

Description

Percentage of estimated confidence in closing the opportunity. It is implied, but not directly controlled, by the StageName field. You can override this field to a different value than what is implied by the StageName.

If you're changing the Probability field through the API using a partner WSDL call, or an Apex before trigger, and the value may have several decimal places, we recommend rounding the value to a whole number. For example, the following Apex in a before trigger uses the round method to change the field value: o.probability = o.probability.round();

PushCount

Type

int

Properties

Filter, Group, Nillable, Sort

Description

The number of times an opportunity's close date has been pushed out by one calendar month. For example, moving a close date from April to May counts as one push, but moving from April 1 to April 30 doesn't count. The total is not decreased when the close date is moved in. Available in API version 53.0 and later.

RecordTypeId

Type

reference

Properties

Create, Filter, Nillable, Update

Description

ID of the record type assigned to this object.

StageName

Type

picklist

Properties

Create, Filter, Group, Sort, Update

Description

Required. Current stage of this record. The StageName field controls several other fields on an opportunity. Each of the fields can be directly set or implied by changing the StageName field. In addition, the StageName field is a picklist, so it has additional members in the returned describeSObjectResult to indicate how it affects the other fields. To obtain the stage name values in the picklist, query the OpportunityStage object. If the StageName is updated, then the ForecastCategoryName, IsClosed, IsWon, and Probability are automatically updated based on the stage-category mapping.

Field	Field Type
SyncedQuoteID	Type reference
	Properties Create, Filter, Nillable, Update
	Description Read only in an Apex trigger. The ID of the Quote that syncs with the opportunity. Setting this field lets you start and stop syncing between the opportunity and a quote. The ID has to be for a quote that is a child of the opportunity.
Territory2Id	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The ID of the territory that is assigned to the opportunity. Available only if Enterprise Territory Management has been enabled for your organization. Users who have full access to an opportunity's account can assign any territory from the active model to the opportunity. Users who do <i>not</i> can assign only a territory that is also assigned to the opportunity's account. The same restriction applies to territory assignments made via Apex in system mode.
TotalOpportunityQuantity	Type double
	Properties Create, Filter, Nillable, Sort, Update
	Description Number of items included in this opportunity. Used in quantity-based forecasting.
Type	Type picklist
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Type of opportunity. For example, Existing Business or New Business. Label is Opportunity Type .



Note: When importing opportunity data, users need the Set Audit Fields upon Record Creation permission to assign values to audit fields such as CreatedDate. Audit fields are automatically updated during API operations unless you set these fields yourself.

Usage

Use the Opportunity object to manage information about a sale or pending deal. You can also sync this object with a child Quote. To update an Opportunity, your client application needs Edit permission on opportunities. You can create, update, delete, and query Attachment records associated with an opportunity via the API. To split credit for an opportunity among multiple opportunity team members, use the OpportunitySplit object.

Client applications can also create or update opportunity objects by converting a Lead with convertLead().



Note: On opportunities and opportunity products, the workflow rules, validation rules, and Apex triggers fire when an update to a child opportunity product or schedule causes an update to the parent record. This means your custom application logic is enforced when there are updates to the parent record, ensuring higher data quality and compliance with your organization's business policies.

Sample Code—Java

This code starts the sync between an object and a child quote.

```
public void startQuoteSync() {
          Opportunity opp = new Opportunity();
          opp.setId(new ID("006D000000cpoSy"));
          opp.setSyncedQuoteId(new ID("0Q0D00000000020Z"));

// Invoke the update call and save the results
try {
          SaveResult[] saveResults = binding.update(new SObject[] {opp});
          // check results and do more processing after the update call ...
}
catch (Exception ex) {
          System.out.println("An unexpected error has occurred." + ex.getMessage());
          return;
}
```

This code stops the sync between an object and a child quote.

```
public void stopQuoteSync() {
          Opportunity opp = new Opportunity();
          opp.setId(new ID("006D000000CpOSy"));
          opp.setFieldsToNull(new String[] {"SyncedQuoteId"} );

// Invoke the update call and save the results

try {
          SaveResult[] saveResults = binding.update(new SObject[] {opp});
          // check results and do more processing after the update call ...
}

catch (Exception ex) {
          System.out.println("An unexpected error has occurred." + ex.getMessage());
          return;
}
```

Associated Objects

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

OpportunityChangeEvent (API version 44.0)

Change events are available for the object.

OpportunityFeed (API version 18.0)

Feed tracking is available for the object.

OpportunityHistory

History is available for tracked fields of the object.

OpportunityOwnerSharingRule

Sharing rules are available for the object.

OpportunityShare

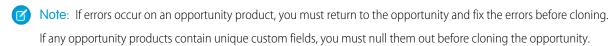
Sharing is available for the object.

Additional Considerations

If you are using before triggers to set Stage and Forecast Category for an opportunity record, the behavior is as follows:

- If you set Stage and Forecast Category, the opportunity record contains those exact values.
- If you set Stage but not Forecast Category, the Forecast Category value on the opportunity record defaults to the one associated with trigger Stage.
- If you reset Stage to a value specified in an API call or incoming from the user interface, the Forecast Category value should also come from the API call or user interface. If no value for Forecast Category is specified and the incoming Stage is different than the trigger Stage, the Forecast Category defaults to the one associated with trigger Stage. If the trigger Stage and incoming Stage are the same, the Forecast Category is not defaulted.

If you are cloning an opportunity with products, the following events occur in order:



- The parent opportunity is saved according to the order of execution.
- The opportunity products are saved according to the order of execution.

OpportunityLineItem

Represents an opportunity line item, which is a member of the list of Product2 products associated with an Opportunity.

Supported Calls

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

Special Access Rules

The user must have the "Edit" permission on Opportunity records to create or update opportunity line items on an opportunity.

Field	Details
CanUseQuantitySchedule	Type boolean
	Properties Defaulted on create, Filter, Group, Sort
	Description Indicates whether the opportunity product can have a quantity schedule (true) or not (false). This field is read-only.
CanUseRevenueSchedule	Type boolean
	Properties Defaulted on create, Filter, Group, Sort
	Description Indicates whether the opportunity product can have a revenue schedule (true) or not (false). This field is read-only.
ConnectionReceivedId	Type reference
	Properties Filter, Group, Nillable, Sort
	Description ID of the PartnerNetworkConnection that shared this record with your organization. This field is available if you enabled Salesforce to Salesforce.
ConnectionSentId	Type reference
	Properties Filter, Group, Nillable, Sort
	Description ID of the PartnerNetworkConnection that you shared this record with. This field is available if you enabled Salesforce to Salesforce. This field is supported using API versions earlier than 15.0. In all other API versions, this field's value is null. You can use the new PartnerNetworkRecordConnection object to forward records to connections.
CurrencyIsoCode	Type picklist
	picklist Properties Defaulted on create, Filter, Group, Restricted picklist, Sort

Field	Details
	Description Available only for organizations with the multicurrency feature enabled. Contains the ISO code for any currency allowed by the organization.
	If the organization has multicurrency enabled, and a Pricebook2 isn'tspecified on the parent opportunity (that is, the Pricebook2Id field is blank on the opportunity referenced by this object's OpportunityId), then the value of this field must match the currency of the CurrencyIsoCode field on the PricebookEntry records that are associated with this object.
Description	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Text description of the opportunity line item. Limit: 255 characters.
Discount	Type percent
	Properties Create, Filter, Nillable, Sort, Update
	Description Discount for the product as a percentage.
	When updating these records:
	 If you specify Discount without specifying TotalPrice, the TotalPrice is adjusted to accommodate the new Discount value, and the UnitPrice is held constant.
	 If you specify both Discount and Quantity, you must also specify either TotalPrice or UnitPrice so the system knows which one to automatically adjust.
HasQuantitySchedule	Type boolean
	Properties Defaulted on create, Filter, Group, Sort
	Description Read-only. Indicates whether a quantity schedule has been created for this object (true) or not (false).
HasRevenueSchedule	Type boolean
	Properties Defaulted on create, Filter, Group, Sort

Field	Details
	Description Indicates whether a revenue schedule has been created for this object (true) or not (false). If this object has a revenue schedule, the Quantity and TotalPrice fields can't be updated. In addition, the Quantity field can't be updated if this object has a quantity schedule. Update requests aren't rejected but the updated values are ignored.
HasSchedule	Type boolean
	Properties Defaulted on create, Filter, Group, Sort Description
	If either HasQuantitySchedule or HasRevenueSchedule is true, this field is also true.
LastReferencedDate	Type datetime Properties
	Filter, Nillable, Sort Description The timestamp for when the current user last viewed a record related to this record. Available in API version 50.0 and later.
LastViewedDate	Type datetime
	Properties Filter, Nillable, Sort
	Description The timestamp for when the current user last viewed this record. If this value is null, this record might only have been referenced (LastReferencedDate) and not viewed. Available in API version 50.0 and later.
ListPrice	Type currency
	Properties Filter, Nillable, Sort
	Description Corresponds to the UnitPrice on the PricebookEntry that is associated with this line item, which can be in the standard price book or a custom price book. A client application can use this information to show whether the unit price (or sales price) of the line item differs from the price book entry list price.

Field	Details
Name	Type string
	Properties Filter, Nillable, Sort
	Description The opportunity line item name (known as "Opportunity Product" in the user interface). This read-only field is available in API version 30.0 and later.
OpportunityId	Type reference
	Properties Create, Filter, Group, Sort
	Description Required. ID of the associated Opportunity.
	This is a relationship field.
	Relationship Name Opportunity
	Relationship Type Lookup
	Refers To Opportunity
PricebookEntryId	Type reference
	Properties Create, Filter, Group, Nillable, Sort
	Description Required. ID of the associated PricebookEntry. Exists only for those organizations that have Products enabled as a feature. In API versions 1.0 and 2.0, you can specify values for either this field or ProductId, but not both. For this reason, both fields are declared nillable. In API version 3.0 and later, you must specify values for this field instead of ProductId.
	This is a relationship field.
	Relationship Name PricebookEntry
	Relationship Type Lookup
	Refers To PricebookEntry
ProductId	Type reference

Field	Details
	Properties Create, Filter, Nillable
	Description ID of the related Product record. This field is unavailable as of version 3.0 and is only provided for backward compatibility. The Product object is unavailable beginning with version 8.0. Use the PricebookEntryId field instead, specifying the ID of the PricebookEntry record.
	This is a relationship field.
	Relationship Name Product2
	Relationship Type Lookup
	Refers To Product2
Product2Id	Type reference
	Properties Create, Filter, Group, Nillable, Sort
	Description The ID of the related Product2 record. This is a read-only field available in API version 30.0 and later.
	$\label{theprice} \textbf{Use the PricebookEntryId field instead, specifying the ID of the PricebookEntry record.}$
ProductCode	Type string
	Properties Filter, Group, Nillable, Sort
	Description This read-only field is available in API version 30.0 and later. It references the value in the ProductCode field of the related Product2 record.
Quantity	Type double
	Properties Create, Filter, Sort, Update
	Description Read-only if this record has a quantity schedule, a revenue schedule, or both a quantity and a revenue schedule.
	When updating these records:

Field	Details
	 If you specify Quantity without specifying the UnitPrice, the UnitPrice value is adjusted to accommodate the new Quantity value, and the TotalPrice is held constant.
	• If you specify both Discount and Quantity, you must also specify either TotalPrice or UnitPrice so the system can determine which one to automatically adjust.
RecalculateTotalPrice	Type boolean
	Properties Defaulted on create, Filter, Group, Sort
	Description
	Changes behavior of OpportunityLineItem calculations when a line item has child schedule rows for the Quantity value. When enabled, if the rollup quantity changes, then the quantity rollup value is multiplied against the sales price to change the total price. Product2 flag must be set to true.
ServiceDate	Type date
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Date when the product revenue will be recognized and the product quantity will be shipped.
	 Opportunity Close Date—ServiceDate is ignored.
	 Product Date—ServiceDate is used if not null.
	• Schedule Date—ServiceDate is used if not null and there are no revenue schedules present for this line item, that is, there are no OpportunityLineItemSchedule records with a field Type value of Revenue that are children of this record.
SortOrder	Type int
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Number indicating the sort order selected by the user. Client applications can use this to match the sort order in Salesforce.
Subtotal	Type currency
	Properties Filter, Nillable, Sort

Field	Details
	Description Difference between standard and discounted pricing. Converted currency amounts when the opportunity's currency is different from the user's currency.
TotalPrice	Type currency
	Properties Create, Defaulted on create, Filter, Nillable, Sort, Update
	Description This field is available only for backward compatibility. It represents the total price of the OpportunityLineItem.
	If you don't specify UnitPrice, this field is required. If you specify Discount and Quantity, this field or UnitPrice is required. When updating these records, you can change either this value or the UnitPrice, but not both at the same time.
	This field is nillable, but you can't set both TotalPrice and UnitPrice to null in the same update request. To insert the TotalPrice via the API (given only a unit price and the quantity), calculate this field as the unit price multiplied by the quantity. This field is read-only if the opportunity line item has a revenue schedule. If the opportunity line item doesn't have a schedule or only has a quantity schedule, this field can be updated.
UnitPrice	Туре
	currency
	Properties Create, Defaulted on create, Filter, Nillable, Sort, Update
	Description The unit price for the opportunity line item. In the Salesforce user interface, this field's value is calculated by dividing the total price of the opportunity line item by the quantity listed for that line item. Label is Sales Price .
	This field or TotalPrice is required. You can't specify both.
	If you specify Discount and Quantity, this field or TotalPrice is required.

Usage

An Opportunity can have associated OpportunityLineItem records only if the Opportunity has a Pricebook2. An OpportunityLineItem must correspond to a Product2 that is listed in the opportunity's Pricebook2. For information about inserting OpportunityLineItem for an opportunity that doesn't have an associated Pricebook2 or any existing line items, see Effects on Opportunities.

This object is defined only for orgs with products enabled as a feature. If the products feature isn't enabled, this object doesn't appear in the describeGlobal() call, and you can't use describeSObjects() or query the OpportunityLineItem object.

For a visual diagram of the relationships between OpportunityLineItem and other objects, see the Product & Price Book diagram.

Mote:

- If the multicurrency option is enabled, the CurrencyIsoCode field is present. It can't be modified, and is always set to the value of the CurrencyIsoCode of the parent Opportunity.
- If customizable product schedules are enabled, you can use custom fields in default schedules and customize their layout. But if you've applied validation rules or Apex triggers, they're bypassed when they're first inserted.

Effects on Opportunities

Opportunities with associated OpportunityLineItem records are affected in the following ways:

- Creating an OpportunityLineItem increments the Opportunity Amount value by the TotalPrice of the OpportunityLineItem. Additionally, inserting an OpportunityLineItem increments the ExpectedRevenue on the opportunity by the TotalPrice times the opportunity Probability.
- The Opportunity Amount becomes a read-only field when the opportunity has line items. The API ignores any attempt to update this field on an opportunity with line items. Update requests aren't rejected, but the updated value is ignored.
- You can't update the PricebookId field or the CurrencyIsoCode field on the opportunity if line items exist. The API rejects any attempt to update these fields on an opportunity with line items.
- When you create or update an OpportunityLineItem, the API verifies that the line item corresponds to a PricebookEntry in the Pricebook2 associated with the opportunity.
 - If the opportunity has an associated active or inactive Pricebook2, the OpportunityLineItem is created or updated.
 - If the opportunity doesn't have an associated Pricebook2, but the OpportunityLineItem corresponds to a PricebookEntry in an active Pricebook2 where the PricebookEntry has a CurrencyIsoCode value that matches the CurrencyIsoCode value of the opportunity, the API automatically sets this PriceBook2 on the opportunity.
 - If the opportunity doesn't have an associated Pricebook2, but the line item corresponds to a PricebookEntry in a Pricebook2 that
 isn't active or that has a CurrencyIsoCode value that does not match the CurrencyIsoCode value of the opportunity,
 an error is returned.
- The Opportunity Has OpportunityLineItem field is set to true when an OpportunityLineItem is inserted for that Opportunity.
- When OpportunityLineltem records are directly deleted, they aren't sent to the recycle bin and can't be undeleted. The
 getDeleted() call shows deleted OpportunityLineltem records until they're purged, which is usually within the same day or
 the next day.
- In Lightning, the ListPrice, Name, and ProductCode fields aren't populated before insert because their values are computed after the OpportunityLineItem. Product2Id value is saved. To access a value from these fields, use an After Insert trigger.

Associated Objects

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

OpportunityLineItemChangeEvent (API version 60.0)

Change events are available for the object.

Pricebook2

Represents a price book that contains the list of products that your org sells.



Note: Price books are represented by Pricebook2 objects. As of API version 8.0, the Pricebook object is no longer available. Requests containing Pricebook are refused, and responses don't contain the Pricebook object.

Supported Calls

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

Field	Details
Description	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Text description of the price book.
IsActive	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether the price book is active (true) or not (false). Inactive price books are hidden in many areas in the user interface. You can change this field's value as often as necessary. Label is Active .
IsArchived	Type boolean
	Properties Defaulted on create, Filter, Group, Sort
	Description
	Indicates whether the price book has been archived (true) or not (false). This field is read only.
IsDeleted	Туре
	boolean
	Properties Defaulted on create, Filter
	Description Description
	Indicates whether the price book has been moved to the Recycle Bin (true) or not (false). Label is Deleted .

Field	Details
IsStandard	Туре
	boolean
	Properties Defaulted on create, Filter, Group, Sort
	Description Indicates whether the price book is the standard price book for the org (true) or not (false). Every org has one standard price book—all other price books are custom price books.
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
Name	Туре
	string
	Properties Create, Filter, Group, idLookup, Sort, Update
	Description Required. Name of this object. This field is read-only for the standard price book. Label is Price Book Name .
ValidFrom	Type dateTime
	Properties Create, Filter, Nillable, Sort, Update
	Description The date and time when a Commerce price book is initially valid. If this field is null, the price book is valid immediately when active. Available in API version 48.0 and later.
ValidTo	Type dateTime

Field	Details
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The date and time when a Commerce price book is valid to. If this field is \mathtt{null} , the price book is valid until it's deactivated. Available in API version 48.0 and later.

Usage

A price book is a list of products that your org sells.

- Each org has one standard price book that defines the standard or generic list price for each product or service that it sells.
- An org can have multiple custom price books to use for specialized purposes, such as for discounts, different channels or markets, or select accounts or opportunities. While your client application can create, delete, and update custom price books, your client application can only update the standard price book.
- For some orgs, the standard price book is the only price needed. If you set up other price books, you can reference the standard price book when setting up list prices in custom price books.

Use this object to query standard and custom price books that have been configured for your org. A common use of this object is to allow your client application to obtain valid Pricebook2 object IDs for use when configuring PricebookEntry records via the API.

Your client application can perform the following tasks on PricebookEntry objects:

- Query
- Create for the standard price book or custom price books.
- Update
- Delete
- Change the IsActive field when creating or updating records

PriceBook2, Product2, and PricebookEntry Relationships

In the API:

- Price books are represented by Pricebook2 records (as of version 8.0, the Pricebook object is no longer available).
- Products are represented by Product2 records (as of version 8.0, the Product object is no longer available).
- Each price book contains zero or more entries (represented by PricebookEntry records) that specify the products that are associated with the price book. A price book entry defines the price for which you sell a product at a particular currency.

These objects are defined only for those orgs that have products enabled as a feature. If the org doesn't have the products feature enabled, the Pricebook2 object doesn't appear in the describeGlobal() call, and you can't access it via the API.

If you delete a Pricebook2 while a line item references PricebookEntry in the price book, the line item is unaffected, but the Pricebook2 is archived and unavailable from the API.

For a visual diagram of the relationships between Pricebook2 and other objects, see Product and Schedule Objects.

Price Book Setup

The process of setting up a price book via the API usually means:

- 1. Load product data into Product2 records (creating one Product2 record for each product that you want to add).
- 2. For each Product2 record, create a PricebookEntry that links the Product2 record to the standard Pricebook2. Define a standard price for a product at a given currency (if you have multicurrency enabled) before defining a price for that product in the same currency in a custom price book.
- **3.** Create a Pricebook2 record to represent a custom price book.
- **4.** For each Pricebook2 record, creating a PricebookEntry for every Product2 that you want to add, specifying unique properties for each PricebookEntry (such as the UnitPrice and CurrencyIsoCode) as needed.

Code Sample—Java

```
public void pricebookSample() {
 try {
    //Create a custom pricebook
   Pricebook2 pb = new Pricebook2();
   pb.setName("Custom Pricebok");
   pb.setIsActive(true);
   SaveResult[] saveResults = connection.create(new SObject[]{pb});
   pb.setId(saveResults[0].getId());
   // Create a new product
   Product2 product = new Product2();
   product.setIsActive(true);
   product.setName("Product");
   saveResults = connection.create(new SObject[]{product});
   product.setId(saveResults[0].getId());
    // Add product to standard pricebook
   QueryResult result = connection.query(
        "select Id from Pricebook2 where isStandard=true"
    );
   SObject[] records = result.getRecords();
   String stdPbId = records[0].getId();
    // Create a pricebook entry for standard pricebook
    PricebookEntry pbe = new PricebookEntry();
   pbe.setPricebook2Id(stdPbId);
   pbe.setProduct2Id(product.getId());
   pbe.setIsActive(true);
   pbe.setUnitPrice(100.0);
    saveResults = connection.create(new SObject[]{pbe});
    // Create a pricebook entry for custom pricebook
   pbe = new PricebookEntry();
   pbe.setPricebook2Id(pb.getId());
   pbe.setProduct2Id(product.getId());
   pbe.setIsActive(true);
   pbe.setUnitPrice(100.0);
   saveResults = connection.create(new SObject[]{pbe});
 } catch (ConnectionException ce) {
   ce.printStackTrace();
```

Associated Objects

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

Pricebook2ChangeEvent (API version 48.0)

Change events are available for the object.

Pricebook2History

History is available for tracked fields of the object.

Product2

Represents a product that your company sells.

This object has several fields that are used only for quantity and revenue schedules (for example, annuities). Schedules are available only for orgs that have enabled the products and schedules features. If these features aren't enabled, the schedule fields don't appear, and you can't guery, create, or update the fields.



Note: As of API version 8.0, the Product object is no longer available. Requests that contain Product are refused, and responses don't contain the Product object. Use the Products2 object instead.

Supported Calls

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

Special Access Rules

The ConfigureDuringSale and IsSoldOnlyWithOtherProds fields are available in version 58.0 and later when Industry Automotive or Subscription Management is enabled.

Field	Details
BillingPolicyId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The ID of the related billing policy. This field is available when Subscription Management is enabled. This field is available in API version 55.0 and later.
	This field is a relationship field.
	Relationship Name BillingPolicy

Field	Details
	Relationship Type Lookup
	Refers To BillingPolicy
CanUseQuantitySchedule	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether the product can have a quantity schedule (true) or not (false). Label is Quantity Scheduling Enabled .
CanUseRevenueSchedule	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether the product can have a revenue schedule (true) or not (false). Label is Revenue Scheduling Enabled .
ConnectionReceivedId	Type reference
	Properties Filter, Group, Nillable, Sort
	Description ID of the PartnerNetworkConnection that shared this record with your org. This field is available when Salesforce to Salesforce is enabled.
ConnectionSentId	Type reference
	Properties Filter, Group, Nillable, Sort
	Description ID of the PartnerNetworkConnection that this record is shared with. This field is available Salesforce to Salesforce is enabled. In API version 16.0 and later, this value is null. Use PartnerNetworkRecordConnection object to forward records to connections.
ConfigureDuringSale	Type picklist
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update

Field	Details
	 Description Determines whether a user can edit a configuration when creating a bundle order or quote. This field is available in API version 58.0 and later. This field is available when Industries Automotive or Subscription Management is enabled. Possible values are: Allowed—Changes are allowed while adding line items to a bundle; for example, when adding products or editing quantity.
	NotAllowed—Changes aren't allowed.
CurrencyIsoCode	Type picklist Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update Description Available only for orgs with the multicurrency feature enabled. Contains the ISO code for any currency allowed by the org.
Description	Type textarea Properties Create, Filter, Nillable, Sort, Update Description A text description of this record. Label is Product Description.
DisplayUrl	Type url Properties Create, Filter, Nillable, Sort, Update Description URL leading to a specific version of a record in the linked external data source.
ExternalDataSourceId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description ID of the related external data source.
ExternalId	Type string

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The unique identifier of a record in the linked external data source. For example, <i>ID #123</i> .
Family	Type picklist
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Name of the product family associated with this record. Product families are configured as picklists in the user interface. To obtain a list of valid values, call describeSObjects() and process the result for the values associated with the Family field. Label is Product Family.
IsActive	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether this record is active (true) or not (false). Inactive Product2 records are hidden in many areas in the user interface. You can change the IsActive flag on a Product2 object as often as necessary. Label is Active.
IsArchived	Type boolean
	Properties Defaulted on create, Filter, Group, Sort
	Description Describes whether the product is archived. The default value is false.
IsDeleted	Type boolean
	Properties Defaulted on create, Filter
	Description Indicates whether the object has been moved to the Recycle Bin (true) or not (false). Label is Deleted .
IsSerialized	Type boolean

Field	Details
	Properties
	Create, Filter, Group, Sort, Update
	Description Indicates if a product is a serialized product (true) or not (false). Label is Serialized .
IsSoldOnlyWithOtherProds	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Determines whether the product can be sold independently or only as part of a bundle.
	This field is available in API version 58.0 and later.
	This field is available when Industries Automotive or Subscription Management is enabled.
	The default value is false, which means that the product can be sold independently.
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description
	The timestamp when the current user last interacted with this record, directly or indirectly. Some sample scenarios are:
LastViewedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description
	The timestamp when the current user last viewed this record or list view. If this value is null, it's possible that the user only accessed this record or list view (LastReferencedDate), but not viewed it.
Name	Type string
	Properties Create, Filter, Group, idLookup, Sort, Update
	Description Required. Default name of this record. Label is Product Name .
NumberOfQuantityInstallments	Туре
	int

Field	Details

Properties

Create, Filter, Group, Nillable, Sort, Update

Description

If the product has a quantity schedule, the number of installments.

NumberOfRevenueInstallments

Type

int

Properties

Create, Filter, Group, Nillable, Sort, Update

Description

If the product has a revenue schedule, the number of installments.

ProductClass

Type

picklist

Properties

Defaulted on create, Filter, Group, Restricted picklist, Sort

Description

This field is read-only. Its value is determined by the value of the Type field and whether the product is associated with a ProductAttribute record. It describes whether a product is a bundle, set, or simple product, a variation parent, or a product variation. Possible values are:

- Bundle—This product is a parent or component in a product bundle.
- Set—This product is included in a product set.
- Simple—This product has no variations
- VariationParent—This product is a variation parent. It's the base product for one
 or more product variations and, though it has its own stock-keeping unit (SKU), isn't a
 sellable entity. Instead, it's the parent of sellable entities—its variations.
- Variation—This product is a variation of a parent product. Each variation has its own SKU.

When the value of ProductClass = VariationParent, it never changes. The value of ProductClass changes between Simple and Variation when you attach or detach a ProductAttribute record to the product.

If you attach a ProductAttribute record to a product, then the product's ProductClass value changes to Variation. Conversely, when you detach all ProductAttribute records from a product, the ProductClass value changes to Simple.

The default value is Simple.

This field is available in API version 50.0 and later. It was introduced to support of B2B and B2C Commerce implementations.

ProductCode

Type

string

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update Description Default product code for this record. Your org defines the product's code-naming pattern.
OuantityInstallmentPoried	
QuantityInstallmentPeriod	Type picklist
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description If the product has a quantity schedule, the amount of time covered by the schedule.
QuantityScheduleType	Type picklist
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description The type of the quantity schedule, if the product has one.
QuantityUnitOfMeasure	Type picklist
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Unit of the product; for example, kilograms, liters, or cases. This field comes with only one value, Each, so consider creating your own. The QuantityUnitOfMeasure field on ProductItem inherits this field's values.
RecalculateTotalPrice	Type boolean
	Properties Defaulted on create, Filter, Group, Sort
	Description Changes behavior of OpportunityLineItem calculations when a line item has child schedule rows for the Quantity value. When enabled, if the rollup quantity changes, then the quantity rollup value is multiplied against the sales price to change the total price.
RevenueInstallmentPeriod	Type picklist
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update

Field	Details
	Description If the product has a revenue schedule, the time period covered by the schedule.
RevenueScheduleType	Type picklist
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description The type of the revenue schedule, if the product has one.
StockCheckMethod	Туре
	picklist
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description The method for how a product's inventory is checked. Stock checks on parent products are common when bundles are prepackaged and individual child components can't be sold separately. Stock checks on child products are common when bundles aren't prepackaged and must be put together during fulfillment. If bundles aren't prepackaged, child components can usually be sold separately.
	Possible values are:
	 Null—Check stock on the product SKU.
	 DoNotCheck —The stock shouldn't be check.
	 ParentProduct —If the product is a parent of a bundle, check stock on the parent product.
	 ChildProducts —If the product is a parent of a bundle, check stock on the child components.
StockKeepingUnit	Туре
	string
	Properties Control of the Control of
	Create, Filter, Group, Nillable, Sort, Update
	Description The SKU for the product. Use in tandem with or instead of the ProductCode field. For example, you can track the manufacturer's identifying code in the Product Code field and assign the product a SKU when you resell it.
TaxPolicyId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update

UnitOfMeasureId

Туре

reference

Field	Details
	Description The ID of the related tax policy.
	This field is available when Subscription Management is enabled. This field is available in API version 55.0 and later.
	This field is a relationship field.
	Relationship Name TaxPolicy
	Relationship Type Lookup
	Refers To TaxPolicy
TransferRecordMode	Type picklist
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description If serialized, indicates when the serial number is recorded. This field is visible based on field-level security.
	The value affects the read-only value of the Product2TransferMode field on the ProductTransfer Object.
	Possible values are:
	 SendAndReceive —The serial number is recorded when sending or receiving. ReceiveOnly —The serial number is recorded when receiving only.
Туре	Type picklist
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort
	Description The type of product. This field's value affects the read-only value of the ProductClassfield on the Product2 object. field.
	• Base—When Type = Base, then ProductClass = VariationParent.
	 Null—When Type = Null, then ProductClass = Simple.
	This field is available when B2B or B2C Commerce is enabled.
	This field is available in API version 50.0 and later.

Field	Details
	Properties Create Filter Court Nillable Cart Hadate
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The ID of the unit of measure associated with the product.
	This field is a relationship field.
	This field is available when Revenue Cloud is enabled.
	This field is available in API version 63.0 and later.
	Relationship Name
	UnitOfMeasure
	Refers To
	UnitOfMeasure

Schedule Enabled Flags

When enabling the schedules feature, you can decide whether to enable quantity schedules, revenue schedules, or both. In addition, you can use the API to control quantity and revenue scheduling at the product level via the CanUseQuantitySchedule and CanUseRevenueSchedule flags. A value of true for either flag indicates that the product and any OpportunityLineItems can have a schedule of that type. These flags can be set when creating or updating Product2 records.

Default Schedule Fields

The remaining schedule fields for this object define default schedules. Default schedule values are used to create an OpportunityLineItemSchedule when an OpportunityLineItem is created for the Product.

The default schedule fields support the following valid values (all fields are also nillable).

Field	Valid Values
RevenueScheduleType	Divide, Repeat
RevenueInstallmentPeriod	Daily, Weekly, Monthly, Quarterly, Yearly
NumberOfRevenueInstallments	Integer from 1 to 150, inclusive.
QuantityScheduleType	Divide, Repeat
QuantityInstallmentPeriod	Daily, Weekly, Monthly, Quarterly, Yearly
NumberOfQuantityInstallments	Integer from 1 to 150, inclusive

When you attempt to set the schedule fields when creating or updating, the API applies cross-field integrity checks. The integrity requirements are:

- If the schedule type is nil, the installment period and number of installments must be nil.
- If the schedule type is set to any value, then the installment period and number of installments must be non-nil.

Any create or update that fails these integrity checks is rejected with an error.

These default schedule fields, CanUseQuantitySchedule, and CanUseRevenueSchedule, are restricted picklist fields and are available only if the org has the schedules feature enabled.

Usage

Use this object to define the default product information for your org. This object is associated by reference with Pricebook2 objects via PricebookEntry objects. The same product can be represented in different price books as price book entries. In fact, the same product can be represented multiple times (as separate PricebookEntry records) in the same price book with different prices or currencies. A product can only have one price for a given currency within the same price book. To be used in custom price books, all standard prices must be added as price book entries to the standard price book.



Note: Note: You can't create lookup fields to Product2 object, which have **Required** check box set to true or the **Don't Allow**Deletion" radio button selected, as the platform would otherwise interpret this and throw an error that you cannot create a master-detail relationship to the object.

You can query the products that have been configured for your org. For example, you can allow your client application to obtain valid product IDs for use when configuring PricebookEntry records via the API. Your client application can perform the following tasks on PricebookEntry objects:

- Query
- Create for the standard price book or custom price books.
- Update
- Delete
- Change the IsActive field when creating or updating records

This object is defined only for those orgs that have products enabled as a feature. If the org doesn't have the products feature, this object doesn't appear in the describeGlobal call, and you can't describe or query this object.

If you try to delete a product via the API but there's an opportunity that uses that product, the delete fails. The workaround is to delete the product in the user interface, which gives you an option to archive the product.



Note: On opportunities and opportunity products, the workflow rules, validation rules, and Apex triggers fire when an update to a child opportunity product or schedule causes an update to the parent record. This means your custom application logic is enforced when there are updates to the parent record, ensuring higher data quality and compliance with your organization's business policies.

Associated Objects

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

Product2ChangeEvent (API version 44.0)

Change events are available for the object.

Product2Feed (API version 18.0)

Feed tracking is available for the object.

Product2History

History is available for tracked fields of the object.

Product2OwnerSharingRule (API version 50.0)

Sharing rules are available for the object.

Rebate Management Object in Design Registration

Rebate Management provides access to a standard object that you can use in Design Registration to manage a relationship between accounts.

For more information about these Rebate Management object, refer to this resource.

• AccountAccountRelation on page 146

PRICE PROTECTION STANDARD OBJECTS

Price Protection data model provides objects and fields to manage price protection programs for partners and distributors. Use these objects to ensure partner margin stability amidst market price fluctuations.

PriceProtectExecLineItem

Represents a line item created as part of a Price Protection Execution. This object is available in API version 63.0 and later.

PriceProtectionExecution

Represents an instance of running the price protection process, capturing execution time, status, and the effective date of price changes. This object is available in API version 63.0 and later.

PriceProtectionTerm

Represents a configuration record that defines the rules, types, and eligible conditions for price protection. This object is available in API version 63.0 and later.

ProductDetectedPriceChange

Represents a detected change in price for a product associated with a partner account. This object is available in API version 63.0 and later.

Rebate Management Objects in Price Protection

Rebate Management provides access to some standard objects that you can use in Price Protection to create and manage rebate programs and manage payouts and transactions.

PriceProtectExecLineItem

Represents a line item created as part of a Price Protection Execution. This object is available in API version 63.0 and later.

A PriceProtectExecLineItem record is automatically generated by the Data Processing Engine when eligible product transactions are processed for price protection. It links to execution records, products, and pricing terms, and stores per-unit pricing, eligibility, and calculation details.

Supported Calls

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

Fields

Field	Details	
AccountId	Type reference	

EDITIONS

Available in: Lightning Experience

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

Field	Details
	Properties
	Create, Filter, Group, Sort, Update
	Description References the partner account related to the transaction being evaluated for price protection
	This field is a relationship field.
	Relationship Name Account
	Refers To Account
CalculatedAmount	Type currency
	Properties Create, Filter, Nillable, Sort, Update
	Description Total protected amount calculated based on the applicable price difference and quantity.
CalculationReferenceRecor	rdId Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description References the rebate or pricing rule used to compute the claim.
	This field is a relationship field.
	Relationship Name CalculationReferenceRecord
	Refers To ProgramRebateType
ClaimReferenceId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Links to the related rebate claim, if one has been generated.
	This field is a polymorphic relationship field.
	Relationship Name ClaimReference
	Refers To RebateClaim

Field	Details
HasWarnings	Туре
	boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Indicates if the execution line item has associated warnings.
	The default value is false.
InTransitQuantity	Туре
	double
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	Quantity of the product in transit.
IsEligible	Туре
	boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Indicates whether the record qualifies for price protection. The default value is false.
LastReferencedDate	
Lastreleienceubate	Type dateTime
	Properties
	Filter, Nillable, Sort
	Description The timestamp when the record was last referenced by a user or system.
LastViewedDate	Туре
	dateTime
	Properties
	Filter, Nillable, Sort
	Description Date and timestamp when the record was last opened in the UI.
LocationId	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description
	References the inventory or sales location relevant to the line item.
	This field is a relationship field.
	Relationship Name Location
	Refers To Location
Name	Type string
	Properties Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description Auto-generated identifier for the line item record.
NewSalePricePerUnit	Type currency
	Properties Create, Filter, Nillable, Sort, Update
	Description The new sale price per unit after the price change.
NewSalePriceType	Type picklist
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Type of sale price applied post-adjustment (e.g., List Price, Net Price).
PriceDifference	Type currency
	Properties Filter, Nillable, Sort
	Description Difference between the old and new sale price per unit. This field is a calculated field.
PriceProtectionExecutionId	Type reference
	Properties Create, Filter, Group, Sort

Field	Details
	Description
	Links to the parent Price Protection Execution record.
	This field is a relationship field.
	Relationship Name PriceProtectionExecution
	Relationship Type Master-detail
	Refers To PriceProtectionExecution (the master object)
PriceProtectionTermId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description References the Price Protection Term used for evaluating eligibility and calculations.
	This field is a relationship field.
	Relationship Name PriceProtectionTerm
	Refers To PriceProtectionTerm
ProductId	Type reference
	Properties Create, Filter, Group, Sort, Update
	Description References the product involved in the price protection claim.
	This field is a relationship field.
	Relationship Name Product
	Refers To Product2
RemainingQuantity	Type double
	Properties Create, Filter, Sort, Update
	Description Quantity of product still eligible for claim after partial adjustments.

Field	Details
SalePricePerUnit	Туре
	currency
	Properties
	Create, Filter, Sort, Update
	Description Original cale price per unit before the price adjustment
	Original sale price per unit before the price adjustment.
SalePriceType	Туре
	picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Type of sale price recorded during the original transaction.
Status	Туре
	picklist
	Properties
	Create, Filter, Group, Restricted picklist, Sort, Update
	Description
	Current processing state of the line item.
	Possible values are:
	• Complete
	• Error
	• New
	 ReadyForClaim—Ready For Claim
	 ReadyForPricing—Ready For Pricing
	 ReadyForSimulation—Ready For Simulation
StatusReason	Туре
	string
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	Additional explanation or message associated with the current status.
TransactionDate	Туре
	date
	Properties
	Create, Filter, Group, Sort, Update

Field	Details
	Description
	Date when the original sale or transaction occurred.
TransactionReferenceId	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Reference to the transaction record from which this line item originates.
	This field is a polymorphic relationship field.
	Relationship Name
	TransactionReference
	Refers To
	PartnerUnsoldInventory
WarningMessage	Туре
	string
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	Descriptive warning associated with this line item, if applicable.

PriceProtectionExecution

Represents an instance of running the price protection process, capturing execution time, status, and the effective date of price changes. This object is available in API version 63.0 and later.

Supported Calls

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

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

Field	Details
	Description Data processing engine instance responsible for creating price protection records.
	This field is a relationship field.
	Relationship Name ExecutionJob
	Refers To BatchCalcJobDefinition
ExecutionReferenceNumber	Type string
	Properties Create, Filter, Group, idLookup, Nillable, Sort, Update
	Description
	Unique reference number generated by the Data Processing Engine for this execution. This can be used to associate related line items to the same execution.
LastExecutionTime	Type dateTime
	Properties Create, Filter, Nillable, Sort, Update
	Description
	Date and time when the price protection execution was last performed by the Data Processing Engine.
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description
	The timestamp when the record was last referenced. This is used internally to optimize performance and user experience.
LastViewedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description
	Date and timestamp when the record was last viewed in the Salesforce UI. Helps track user engagement.

Field	Details
Name	Туре
	string
	Properties
	Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description
	Auto-generated name for the price protection execution record. Used as the primary identifier within the system.
OwnerId	Type reference
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Identifier for the user or group that owns this record.
	This field is a polymorphic relationship field.
	Relationship Name Owner
	Refers To Group, User
PriceChangeEffectiveDate	Type date
	Properties
	Create, Filter, Group, Sort, Update
	Description
	Date when the new price goes into effect as part of the price protection execution.
Status	Type picklist
	Properties Create, Filter, Group, Restricted picklist, Sort, Update
	Description
	Represents the current lifecycle status of the price protection execution process.
	Possible values are:
	• Completed
	• New
	• Processing

PriceProtectionTerm

Represents a configuration record that defines the rules, types, and eligible conditions for price protection. This object is available in API version 63.0 and later.

A PriceProtectionTerm record is referenced during claims processing to calculate supported price and quantity adjustments based on predefined terms.

Supported Calls

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

Field	Details
CalculationReferenceRecordId	Type reference
	Properties Create, Filter, Group, Sort, Update
	Description Rebate type that's applicable for the claim amount calculation. This field is a relationship field.
	Relationship Name CalculationReferenceRecord
	Refers To ProgramRebateType
IsPayable	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether the inventory is eligible for payment or refund after a price protection adjustment.
	The default value is false.
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort

Field	Details
	Description
	The timestamp when the record was last referenced by the current user. Useful for activity tracking.
LastViewedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description
	Date and the timestamp when the record was last viewed by the user. Helps in understanding record engagement.
Name	Type string
	Properties Create, Filter, Group, idLookup, Sort, Update
	Description Unique name for the Price Protection Term. This is typically used as a primary identifier for UI display or business logic.
NewSalePriceType	Type picklist
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Defines the type of new sale price applicable after a price protection scenario. This helps classify how the adjusted sale price can be handled.
OwnerId	Type reference
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Identifier for the user or group who owns the record.
	This field is a polymorphic relationship field.
	Relationship Name Owner
	Refers To Group, User

Field	Details
PriceProtectionType	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update
	Description Defines the type of price protection applied.
	Possible values are:
	PriceProtection—Price Protection
	 ReversePriceProtection—Reverse Price Protection
	The default value is PriceProtection.
SalePriceType	Type picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description Specifies the type of sale price before price protection is applied. This helps calculate the protection delta during claim processing.
SupportedPricePercent	Туре
	percent
	Properties Create, Defaulted on create, Filter, Nillable, Sort, Update
	Description Indicates the percentage of the price that is supported for price protection. Helps calculate eligible claim amounts.
SupportedQuantityPercent	Type percent
	Properties Create, Defaulted on create, Filter, Nillable, Sort, Update
	Description Indicates the percentage of quantity that is eligible for price protection. Used to determine prorated reimbursement.

Product Detected Price Change

Represents a detected change in price for a product associated with a partner account. This object is available in API version 63.0 and later.

A ProductDetectedPriceChange record is automatically created when the system identifies a change in product pricing that can require price protection evaluation or further processing.

Supported Calls

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

Field	Details
AccountId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description References the partner account for which the price change was detected.
	This field is a relationship field.
	Relationship Name Account
	Refers To Account
EffectiveDate	Type date
	Properties Create, Filter, Group, Sort, Update
	Description Date when the new price becomes effective for the product.
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp when the record was last referenced by the current user. Useful for activity tracking.
LastViewedDate	Type dateTime
	Properties Filter, Nillable, Sort

Field	Details
	Description Date and the timestamp the record was last referenced by a user or system process.
Name	Type string
	Properties Create, Filter, Group, idLookup, Sort, Update
	Description Unique name or identifier for the price change record.
OwnerId	Туре
	reference
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description User or group that owns this record. This is a polymorphic relationship field.
	This field is a polymorphic relationship field.
	Relationship Name Owner
	Refers To Group, User
ProcessingStatus	Type picklist
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	Indicates the current processing stage of the price change.
	Possible values are:
	• Completed
	• Inactive
	• New
	• Processing—In Progress
ProductId	Type reference
	Properties Create, Filter, Group, Sort, Update
	Description References the product for which the price change was detected.

Field	Details
	This field is a relationship field.
	Relationship Name Product
	Refers To Product2

Rebate Management Objects in Price Protection

Rebate Management provides access to some standard objects that you can use in Price Protection to create and manage rebate programs and manage payouts and transactions.

For more information about these Rebate Management objects, refer to these resources.

- ProgramRebateType
- ProgramRebateTypeProduct on page 167
- RebateClaim on page 170
- RebateProgram on page 197
- RebateProgramMember on page 200

REBATE MANAGEMENT STANDARD OBJECTS

Rebate Management data model provides objects and fields to create and manage rebate programs and manage payouts and transactions. Use the objects to optimize the incentives offered to build a mutually profitable relationship with your partners.

Rebate Management is available in Lightning Experience.

Available in: Enterprise, Unlimited, and Developer Editions.

AccountAccountRelation

Represents a relationship between accounts, such as a relationship between a distributor account and a ship-to account. This object is available in API version 58.0 and later.

PartyRoleRelation

Represents information about the type of relationship between the participants in a relationship. This object is available in API version 58.0 and later.

ProgramRebateType

Provide the rebate types that are part of this program. For example, volume rebate, revenue rebate, or rebate on every transaction. This object is available in API version 51.0 and later.

ProgramRebateTypeBenefit

Defines the benefit matrix for the rebate type. For example, 5% or \$200. This object is available in API version 51.0 and later.

PgmRebateTypBnftMapping

If benefit table is extended, defines mapping of benefit field to the aggregate object fields. This object is available in API version 51.0 and later.

ProgramRebateTypeFilter

The definition that filters the transaction journals eligible for a rebate type. This filter definition is used in the rebates data processing engines. This object is available in API version 51.0 and later.

ProgramRebateTypePayout

The payout given to a member for a particular rebate type. For example, volume rebate payout in Jan'19 for ABC enterprises is \$560, petrol engine payout for ABC in Jan'19 is \$440. This object is available in API version 51.0 and later.

Program Rebate Typ Payout Src

The rebate amount and the tier applied calculated for each row in the aggregate. There is a 1 to 1 relation between payout source and aggregate. This object is available in API version 51.0 and later.

ProgramRebateTypeProduct

Represents a junction between a program rebate type and a product. This object is available in API version 53.0 and later.

ProgramRebateTypeReference

Represents the association between the contract, opportunity, or any eligible standard or custom object, and rebate type. This object is available in API version 52.0 and later.

RebateClaim

Represents information about the claim submitted by the end customer or distributor for a ship and debit program. This object is available in API version 54.0 and later.

RebateClaimAdjustment

Represents information about the adjustments made to the rebate claim. This object is available in API version 58.0 and later.

Rebate Management Standard Objects

RebateMemberAggregateItem

Represents a junction between a rebate member product aggregate and a transaction journal. This object is available in API version 54.0 and later.

RebateMemberClaimAggregate

Represents information about the aggregated claim quantity and amount for a rebate member per product. This object is available in API version 58.0 and later.

RebateMemberProductAggregate

Stores the post calculation summary of journal transactions by member, period, and rebate type. For example, ABC enterprises for May 2021 against Vol Rebate on Radius category, did a total quantity of 150 units and transaction amount of \$80,000. This object is available in API version 65.0 and later.

Rebate Partner Special Prc Trm

Represents information about the special pricing term for a ship and debit program. This object is available in API version 58.0 and later.

RebatePayment

Tracks if the payment has been generated for this member for back end processing. This object is available in API version 51.0 and later.

RebatePayoutAdjustment

Rebate amount adjustment that needs to be given manually. An adjustment is an amount added or subtracted to the calculated rebate amount. This object is available in API version 51.0 and later.

RebateProgram

The rebate program your organization runs with a single account, all accounts, or specific list of accounts. This object is available in API version 51.0 and later.

RebateProgramMember

The member of a rebate program. By virtue of being a member, the partner or business account is eligible to get rebate payments. For example, ABC Enterprises and HVAC Corp are members of GoldStone Volume Rebate Program. This object is available in API version 51.0 and later.

RebateProgramMemberPayout

The payout calculated for a member for the period. For example, \$1000 Jan'21 payout for ABC enterprises. This object is available in API version 51.0 and later.

RebateProgramPayoutPeriod

The period of the payout calculation. For example, 1st to 31st Jan, or 1st Dec to 14th Dec. This object is available in API version 51.0 and later.

RebatePtnrSpclPrcTrmBnft

Represents information about the benefit tier in a rebate partner special pricing term. This object is available in API version 58.0 and later

ReceivedDocument

Allows partners to upload .CSV document. This object is available in API version 51.0 and later.

TransactionJournal

The transactions that need to be processed for a rebate program. For example, order line for 1000 units of \$1200 for member ABC enterprises. This object is available in API version 51.0 and later.

UnitOfMeasureConversion

Represents the information used to convert a measurement value from a unit of measure to another. This object is available in API version 52.0 and later.

AccountAccountRelation

Represents a relationship between accounts, such as a relationship between a distributor account and a ship-to account. This object is available in API version 58.0 and later.

Supported Calls

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

Fields

Field	Details
AccountId	Туре
	reference
	Properties Create, Filter, Group, Sort, Update
	Description ID of the account associated with this account account relationship.
	This field is a relationship field.
	Relationship Name Account
	Relationship Type Lookup
	Refers To Account
EndDate	Туре
	date
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The date when the relationship ends.
HierarchyType	Type picklist
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description Specifies the hierarchy between accounts that are related.
	Possible values are:
	• Child

Field	Details
	• Parent
	• Peer
	The default value is Peer.
IsActive	Туре
	boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether the account is actively involved with the related account (true) or not (false).
	The default value is false.
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.
LastViewedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp when the current user last viewed this record or list view.
Name	Type string
	Properties Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description Name of the account relationship.
OwnerId	Type reference
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description ID of the owner of this object.

Field	Details
	This field is a polymorphic relationship field.
	Relationship Name Owner
	Relationship Type Lookup
	Refers To Group, User
PartyRoleRelationId	Type reference
	Properties Create, Filter, Group, Sort, Update
	Description The relationship between two accounts.
	This field is a relationship field.
	Relationship Name PartyRoleRelation
	Relationship Type Lookup
	Refers To PartyRoleRelation
RelatedAccountId	Type reference
	Properties Create, Filter, Group, Sort, Update
	Description The related account in the relationship.
	This field is a relationship field.
	Relationship Name RelatedAccount
	Relationship Type Lookup
	Refers To Account
RelatedInverseRecordId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The record that specifies the inverse relationship between the accounts.
	This field is a relationship field.
	Relationship Name RelatedInverseRecord
	Relationship Type Lookup
	Refers To AccountAccountRelation
StartDate	Type date
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The date when the relationship starts.

PartyRoleRelation

Represents information about the type of relationship between the participants in a relationship. This object is available in API version 58.0 and later.

Supported Calls

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

Field	Details
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.

Field	Details
LastViewedDate	Туре
	dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp when the current user last viewed this record or list view.
Name	Туре
	string
	Properties Create, Filter, Group, idLookup, Sort, Update
	Description Name of the party role relationship.
OwnerId	Type reference
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description ID of the owner of this object.
	This field is a polymorphic relationship field.
	Relationship Name Owner
	Relationship Type Lookup
	Refers To Group, User
RelatedInverseRecordId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The record that specifies the inverse relationship between the roles.
	This field is a relationship field.
	Relationship Name RelatedInverseRecord
	Relationship Type Lookup
	Refers To PartyRoleRelation

Field	Details
RelatedRoleName	Туре
	string
	Properties
	Create, Filter, Group, Sort, Update
	Description The role that's related to another role in the relationship.
RelationshipObjectName	Туре
	picklist
	Properties
	Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update
	Description The object that's associated with the relationship.
	Possible values are:
	Account Account Relationship—Account Account Relationship
	Contact Contact Relationship—Contact Contact Relationship
	The default value is Account_Account_Relationship.
RoleName	Туре
	string
	Properties
	Create, Filter, Group, Sort, Update
	Description
	The name of the role in the relationship.
ShouldCreaInversRoleAuto	Туре
	boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort
	Description
	Indicates whether a role record should be created automatically for the relationship (true) or not (false).
	The default value is false.

Program Rebate Type

Provide the rebate types that are part of this program. For example, volume rebate, revenue rebate, or rebate on every transaction. This object is available in API version 51.0 and later.

Supported Calls

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

Field	Details
AccrualRate	Type double
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The rate you want to accrue at for the rebate program member. This rate is in the same units as the specified measure type, for example percent or amount. This field is available in API version 52.0 and later.
AggregateObjectName	Туре
	picklist
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	Name of the custom aggregation entity. For example, RebateMemberProductAggregate.
BenefitQualifierField	Туре
	picklist
	Properties Crosto Filter Crosup Millable Postvicted picklist Cort Update
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description Represents an attribute in the aggregate object whose value will be used, in conjunction with Aggregate Field and Rebate Type Benefit Field attributes from the PgmRebateTypBnftMapping entity, to determine the Benefit Value from the ProgramRebateTypeBenefit entity.
	Possible values are:
	GrowthAmount—Rebate Member Product Aggregate:Growth Amount.
	 GrowthAmountPercent—Rebate Member Product Aggregate:Growth Amount Percent.
	 GrowthQuantity—Rebate Member Product Aggregate: Growth Quantity.
	 GrowthQuantityPercent—Rebate Member Product Aggregate:Growth Quantity Percent.
	• PriorTotalQuantity—Rebate Member Product Aggregate: Prior Total Quantity.
	 PriorTotalTransactionAmount—Rebate Member Product Aggregate:Prior Total Transaction Amount.

Field	Details
	 TotalQuantity—Rebate Member Product Aggregate:Total Quantity.
	 TotalTransactionAmount—Rebate Member Product Aggregate: Total Transaction Amount.
CalcObjectId	Type reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description Specifies the data processing engine definition used for the calculation. Only active data processing engine definitions can be used.
	Possible values are:
	Aggregate By Member
	Aggregate By Product
	Account Hierarchy Member Aggregate
	• Process Per Transaction
	Ship and Debit Member Aggregate
	• Year on Year Growth
CalculationBasis	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description Specify the basis for rebate amount calculation. This field is available in API version 52.0 and later.
	Possible values are:
	 Accrual: Accrual rate, if provided, or the benefit setup is used to calculate the rebate amount.
	 Payout: Benefit setup is used to calculate the rebate amount.
	 PayoutAndAccrual—Payout and Accrual: Benefit setup is used for payout, and accrual rate for accrual amount.
	The default value is 'Payout'.
CalculationMethod	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description Specifies the rule for calculating rebate benefits.

Field	Details
	Possible values are:
	• Retrospective
	• Stepped
CalculationType	Туре
	picklist
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description Type of calculation for the rebate type.
	Possible values are:
	• AggregateBased
	• Custom
	• GrowthBased
	• PerTransaction
FilterCriteria	Type textarea
	Properties Nillable
	Description Stores the rebate type filter definition in JSON format, which will be consumed by the Calc object.
FilterLogic	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Contains the filter criteria options that are offered - AND, OR, Custom.
IsInTransitQtyApplicable	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Determine eligibility to include or exclude in-transit quantities
	The default value is false.
IsIntegratable	Type boolean

Field	Details
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	This field determines if the rebate type record is of type template or not, based on which the record can be associated with an opportunity, contract, quote, or any other eligible object.
	The default value is 'false'.
MeasureField	Type picklist
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	Stores the reference to the aggregate object that will be used for rebate amount calculation based on the measure type selected and the benefit value fetched.
	Possible values are:
	• GrowthAmount—Rebate Member Product Aggregate:Growth Amount.
	 GrowthAmountPercent—Rebate Member Product Aggregate:Growth Amount Percent.
	 GrowthQuantity—Rebate Member Product Aggregate:Growth Quantity.
	 GrowthQuantityPercent—Rebate Member Product Aggregate:Growth Quantity Percent.
	 PriorTotalQuantity—Rebate Member Product Aggregate: Prior Total Quantity
	 PriorTotalTransactionAmount—Rebate Member Product Aggregate:Prior Total Transaction Amount.
	 TotalQuantity—Rebate Member Product Aggregate:Total Quantity.
	 TotalTransactionAmount—Rebate Member Product Aggregate: Total Transaction Amount.
Name	Туре
	string
	Properties Create, Filter, Group, idLookup, Sort, Update
	Description
	Name of the program rebate type.
ProductFilterType	Type picklist
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	The criteria to be applied for the products present in the Included or Excluded Products list

Field	Details
	Possible values are:
	ExcludeProducts—Exclude Products
	• IncludeProducts—Include Products
RebateMeasureType	Type picklist
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description Type of rebate.
	Possible values are:
	• AmountperUnit
	• Custom
	• FixedAmount
	• PercentageOfRevenue
RebateProgramId	Type reference
	Properties
	Create, Filter, Group, Sort, Update
	Description Reference to the rebate program.
Status	Туре
	picklist
	Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update
	Description Status of the rebate type.
	Possible values are:
	• Active
	• Inactive
UnitOfMeasureId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The unit of measure associated with the program rebate type. This field is available in API version 52.0 and later.

Field	Details
	This is a relationship field.
	Relationship Name UnitOfMeasure
	Relationship Type Lookup
	Refers To UnitOfMeasure
ValidityDuration	Type int
	Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	Description Duration for which the inventory is eligible for price protection/Duration of inventory eligibility for price protection
ValidityDurationType	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description The unit of measure for the validity duration.
	Possible values are:
	• Days
	• Months
	• Years
	The default value is Years.

Usage

Each program can have multiple rebate types. For example, buy 100 units and get 2% revenue back, buy 10 units of petrol engines and get 1% rebate, and so on. If you want to give tiered benefits, select the Benefit Qualifier Field. For example, to give a tiered benefit of \$5 for 0–100 units and \$10 for 101–500 units, select Total Quantity in the Benefit Qualifier Field when the Measure Type is Total Quantity.

ProgramRebateTypeBenefit

Defines the benefit matrix for the rebate type. For example, 5% or \$200. This object is available in API version 51.0 and later.

Supported Calls

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

Field	Details
BenefitValue	Туре
	double
	Properties
	Create, Filter, Sort, Update
	Description Rebate benefit at a level. For example, 3%, \$3000.
EffectiveEndDate	Type
	date
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description
	The date until when the program rebate type benefit is effective. If the date does not match a payout period end date, it isn't picked.
EffectiveStartDate	Туре
	date
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description
	The date from when the program rebate type benefit is effective. If the date does not match a payout period start date, it isn't picked.
MaximumMeasureFieldValue	Туре
	double
	Properties Create, Filter, Nillable, Sort, Update
	Description
	Cap the measure value at a certain figure. For example, pay 1% on \$100,000 even when the members do more than that.
MaximumQualifyingValue	Туре
	double
	Properties
	Create, Filter, Nillable, Sort, Update

Field	Details
	Description Upper limit of quantity or revenue at a level.
MinimumQualifyingValue	Type double
	Properties Create, Filter, Sort, Update
	Description Minimum quantity or revenue required to qualify to a level.
Name	Type string
	Properties Create, Filter, Group, idLookup, Sort, Update
	Description Name of the qualification. For example, Tier 1/2/3, Gold/Silver.
ProductId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description
	Use this if the benefits vary by products. For example, Product A has a tier from 1-100 units for \$20 and Product B has 1-100 units at \$19.
	To use product or any dimension to the benefits, add that field in benefit mapping
Status	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update
	Description Status of the program rebate type benefit.
	Possible values are:
	• Active
	• Inactive

Usage

The benefit table can be extended with custom columns, for example, Region. The benefits can then be configured as: APAC 3%, USA 2%, and so on.

PgmRebateTypBnftMapping

If benefit table is extended, defines mapping of benefit field to the aggregate object fields. This object is available in API version 51.0 and later.

Supported Calls

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

Field	Details
AggregateField	Type picklist
	Properties Create, Filter, Group, Restricted picklist, Sort, Update
	Description Used to describe the join conditions between the aggregate object and the Program Rebate Type Benefit entity.
	Possible values are:
	 RebateMemberProductAggregate.GrowthAmount—Growth Amount
	 RebateMemberProductAggregate.GrowthAmountPercent—Growth Amount Percent
	 RebateMemberProductAggregate.GrowthQuantity—GrowthQuantity
	 RebateMemberProductAggregate.GrowthQuantityPercent—Growth QuantityPercent
	 RebateMemberProductAggregate.LastReferencedDate—Last Referenced Date
	 RebateMemberProductAggregate.LastViewedDate—LastViewedDate
	 RebateMemberProductAggregate.PriorTotalQuantity—PriorTotal Quantity
	 RebateMemberProductAggregate.PriorTotalTransactionAmount—Prior Total Transaction Amount
	 RebateMemberProductAggregate.ProductId—ProductID
	 RebateMemberProductAggregate.ProgramRebateTypeId—Program RebateID
	 RebateMemberProductAggregate.RebateProgramMemberId—Rebate Program MemberID
	 RebateMemberProductAggregate.RebateProgramPayoutPeriodId—Rebate Program Payout Period ID
	 RebateMemberProductAggregate.TotalQuantity—TotalQuantity

Field	Details
	 RebateMemberProductAggregate.TotalTransactionAmount—Total Transaction Amount
	$\bullet \texttt{RebateMemberProductAggregate.TransactionJournalId} \\ \texttt{ID}$
ProgramRebateTypeId	Туре
	reference
	Properties
	Create, Filter, Group, Sort
	Description Parent identifier
RebateTypeBenefitField	Туре
	picklist
	Properties
	Create, Filter, Group, Restricted picklist, Sort, Update
	Description Used to describe the join conditions between the aggregate object and the Program Rebate Type Benefit entity.
	Possible values are:
	• ProductId—ID of the Product

ProgramRebateTypeFilter

The definition that filters the transaction journals eligible for a rebate type. This filter definition is used in the rebates data processing engines. This object is available in API version 51.0 and later.

Supported Calls

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

Field	Details
FilterField	Type picklist
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update

Field Details

Description

The field name to use for the program rebate type filter.

Possible values are:

- ActivityDate—Activity date.
- CloneSourceId—Cloned source ID.
- CreatedById—Created by.
- CreatedDate—Created date.
- ExternalTransactionNumber—External transaction ID.
- Id—ID
- IsDeleted—Deleted.
- JournalDate—Journal date.
- LastModifiedById—Last modified by.
- LastModifiedDate—The most recent date on which a user modified this record.
- LastReferencedDate—The most recent date on which a user referenced this
 record.
- LastViewedDate—The most recent date on which a user viewed this record.
- MemberId—Program Member
- Name
- OrderId—Order
- OrderItemId—Order Product.
- ProductCategoryId—Product Category
- ProductId—Product
- Quantity
- QuantityUnitOfMeasureId—Quantity Unit
- SystemModstamp—System Modstamp
- TransactionAmount—Transaction Amount.
- UsageType—Usage Type.
- UserRecordAccessId—Object Access Level.

Operator

Type

picklist

Properties

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

Description

The filter operator.

Possible values are:

- Contains—in
- Equals—equals

Field	Details
	GreaterThan—greater than
	 GreaterThanOrEquals—greater or equal
	• LessThan—less than
	 LessThanOrEquals—less or equal
	 NotEquals—not equal to
ProgramRebateTypeId	Туре
	reference
	Properties
	Create, Filter, Group, Sort
	Description
	The parent program rebate type associated with the filter.
Sequence	Туре
	int
	Properties
	Create, Filter, Group, Sort, Update
	Description
	The unique sequence number for each condition within the program rebate type filter.
Value	Туре
	string
	Properties
	Create, Filter, Group, Sort, Update
	Description
	The value for filtering the program rebate type.

ProgramRebateTypePayout

The payout given to a member for a particular rebate type. For example, volume rebate payout in Jan'19 for ABC enterprises is \$560, petrol engine payout for ABC in Jan'19 is \$440. This object is available in API version 51.0 and later.

Supported Calls

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

Field	Details
AccruedAmount	Туре
	currency
	Properties
	Filter, Nillable, Sort
	Description
	The accrued amount for the program rebate type payout.
	This is a calculated field.
Name	Туре
	string
	Properties
	Create, Filter, Group, idLookup, Sort, Update
	Description
	Name of the program rebate type.
ProgramRebateTypeId	Туре
	reference
	Properties
	Create, Filter, Group, Sort
	Description
	Unique identifier for the program rebate type.
RebateAmount	Туре
	currency
	Properties
	Filter, Nillable, Sort
	Description
	Rebate amount.
	This is a calculated field.
RebateProgramMemberPayoutId	Туре
	reference
	Properties
	Create, Filter, Group, Sort
	Description
	Unique identifier of the rebate program member payout.
TotalBenefitQualifierValue	Туре
	double

Field	Details
	Properties Filter, Nillable, Sort
	Description Roll-up summary of the Benefit Qualifier Value from the Program Rebate Type Payout Source entity.
	This is a calculated field.
TotalMeasureValue	Type double
	Properties Filter, Nillable, Sort
	Description Roll-up summary for the Measure Value field from the Program Rebate Type Payout Source entity.
	This is a calculated field.

Program Rebate Typ Payout Src

The rebate amount and the tier applied calculated for each row in the aggregate. There is a 1 to 1 relation between payout source and aggregate. This object is available in API version 51.0 and later.

Supported Calls

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

Field	Details
AccrualRate	Type double
	Properties Create, Filter, Nillable, Sort, Update
	Description The accrual rate for the program rebate type payout source. This field is available in API version 52.0 and later.
AccruedAmount	Type currency

Field	Details
	Properties Control of the Land
	Create, Filter, Nillable, Sort, Update
	Description The accrued amount for the program rebate type payout source. This field is available in API version 52.0 and later.
AggregateIdentifierId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Unique identifier for the aggregate row.
BenefitQualifierValue	Type double
	Properties Create, Filter, Nillable, Sort, Update
	Description Value of the attribute from the aggregate object that is set up as Benefit Qualifier.
MeasureValue	Type double
	Properties Create, Filter, Nillable, Sort, Update
	Description Value of the attribute from the aggregate object that is set up as Measure Field.
MemberId	Туре
	reference
	Properties Create, Filter, Group, Sort
	Description Unique identifier for the member.
Name	Type string
	Properties Create, Filter, Group, idLookup, Sort, Update
	Description Name of the rebate program member.

Field	Details
ProgramRebateTypeBenefitId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Program rebate type benefit identifier.
ProgramRebateTypePayoutId	Type reference
	Properties Create, Filter, Group, Sort
	Description Unique identifier of the program rebate type payout.
RebateAmount	Type currency
	Properties Create, Filter, Nillable, Sort, Update
	Description Rebate amount calculated by invocable actions.

${\bf Program Rebate Type Product}$

Represents a junction between a program rebate type and a product. This object is available in API version 53.0 and later.

Supported Calls

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

Field	Details
ProductId	Type reference
	Properties Create, Filter, Group, Sort, Update
	Description The product associated with the record.

Field	Details
	This is a relationship field.
	Relationship Name Product
	Relationship Type Lookup
	Refers To Product2
ProgramRebateTypeId	Type reference
	Properties Create, Filter, Group, Sort
	Description The program rebate type associated with the product.
	This is a relationship field.
	Relationship Name ProgramRebateType
	Relationship Type Lookup
	Refers To ProgramRebateType

ProgramRebateTypeReference

Represents the association between the contract, opportunity, or any eligible standard or custom object, and rebate type. This object is available in API version 52.0 and later.

Supported Calls

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

Field	Details
ProgramRebateTypeId	Type reference
	Properties Create, Filter, Group, Sort, Update

Field	Details
	Description The program rebate type associated with the record.
	This is a relationship field.
	Relationship Name ProgramRebateType
	Relationship Type Lookup
	Refers To ProgramRebateType
ProgramRebateTypeSrcId	Type reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description The source program rebate type associated to the contract, opportunity, or quote, or any other eligible standard or custom object.
	This is a relationship field.
	Relationship Name ProgramRebateTypeSrc
	Relationship Type Lookup
	Refers To ProgramRebateType
ReferenceObjectId	Type reference
	Properties
	Create, Filter, Group, Sort, Update
	Description The contract, opportunity, quote, or any other eligible standard or custom object associated with the program rebate type.
	This is a polymorphic relationship field.
	Relationship Name ReferenceObject
	Relationship Type Lookup
	Refers To Contract, Opportunity, Order, Sales Agreement

RebateClaim

Represents information about the claim submitted by the end customer or distributor for a ship and debit program. This object is available in API version 54.0 and later.

Supported Calls

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

Field	Details
ApprovedAmount	Туре
	currency
	Properties
	Filter, Nillable, Sort
	Description
	The approved rebate claim amount. Available in API version 58.0 and later.
CalculatedAmount	Туре
	currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The calculated rebate claim amount. Available in API version 58.0 and later.
ClaimAmount	Туре
	currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The amount for which rebate is claimed.
ClaimDate	Туре
	dateTime
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The date when the claim is submitted by the claimant.

Field	Details
ClaimType	Type picklist
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	Specifies the type of the rebate claim. Available in API version 58.0 and later.
	Possible values are:
	PriceProtection—Price Protection
	 ReversePriceProtection—Reverse Price Protection
	 StandardRebate—Standard Rebate
	• C
	The default value is StandardRebate.
ClaimedByAccountId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description
	The account of the customer or distributor who is submitting the claim.
	This field is a relationship field.
	Relationship Name ClaimedByAccount
	Relationship Type
	Lookup
	Refers To
	Account
ClaimedByAccountNumber	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The reference number of the account of the customer or distributor who is submitting the claim.
CurrencyIsoCode	Type picklist
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update

Field	Details
	Description If multiple currencies are enabled, this field contains the currency ISO code associated with the record.
	Possible values are:
	• EUR—Euro
	• usd—U.S. Dollar
	The default value is EUR.
Description	Туре
	textarea
	Properties
	Create, Filter, Nillable, Sort, Update
	Description The description of the rebate claim.
LastReferencedDate	Туре
	dateTime
	Properties Filter, Nillable, Sort
	Description
	The most recent date on which a user referenced this record.
LastViewedDate	Type dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The most recent date on which a user viewed this record.
Name	Type string
	Properties Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description Autogenerated name of the rebate claim.
OwnerId	Туре
	reference
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Greate, Denaulted on Greate, Filter, Group, Sort, Opuate

Field	Details
	Description
	ID of the rebate claim record owner.
	This field is a polymorphic relationship field.
	Relationship Name Owner
	Relationship Type Lookup
	Refers To Group, User
ParticipatingAccountId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The account of a participant in the claim. It can be the ship to/end customer or shipper/channel partner.
	This field is a relationship field.
	Relationship Name ParticipatingAccount
	Relationship Type Lookup
	Refers To Account
ParticipatingAccountNumber	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The reference number of the account of a participant in the claim. It can be the ship to/end customer or shipper/ channel partner.
ProcessingStatus	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	Description The processing status of the rebate claim.
	Possible values are:
	• Approved

Field	Details
	• Complete
	• In Review
	• New
	• Rejected
	• Reviewed
	System Failed
	• System Processed
	The default value is New.
ProcessingStatusMessage	Туре
	string
	Properties Create, Filter, Nillable, Sort, Update
	Description The message with the details of the rebate claim's processing status when it isn't completed.
ProductCode	Туре
	string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The reference number of the product for which the rebate claim is submitted.
ProductId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The product for which the rebate claim is submitted.
	This field is a relationship field.
	Relationship Name Product
	Relationship Type Lookup
	Refers To Product2
ProgramReferenceNumber	Type string
	Properties
	Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The reference number of the rebate program.
Quantity	Type double
	Properties Create, Filter, Sort, Update
	Description The quantity of the product for which the rebate claim is submitted.
QuantityUnitOfMeasureId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The unit of measure of the quantity. Available in API version 58.0 and later.
	Relationship Name QuantityUnitOfMeasure
	Relationship Type Lookup
	Refers To UnitOfMeasure
RebateMemberClaimAggregateId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The rebate member claim aggregate record related to the rebate claim. Available in API version 58.0 and later.
	Relationship Name RebateMemberClaimAggregate
	Relationship Type Lookup
	Refers To RebateMemberClaimAggregate
RebatePaymentId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The rebate payment record related to the rebate claim. Available in API version 58.0 and later.
	Relationship Name RebatePayment
	Relationship Type Lookup
	Refers To RebatePayment
ReceivedDocumentId	Type reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description The received document that this claim is part of. Available in API version 58.0 and later.
	Relationship Name ReceivedDocument
	Relationship Type Lookup
	Refers To ReceivedDocument
ReferencePricePerUnit	Type
	Create, Filter, Nillable, Sort, Update
	Description The price of a product unit that's agreed upon between the manufacturer and the claimant by the manufacturer and the distributor or the manufacturer and the customer for the rebate claim.
ResalePricePerUnit	Type currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description The price at which the claimant bought the product.
SalePricePerUnit	Type currency

Field	Details
	Properties Create, Filter, Nillable, Sort, Update
	Description The original price at which a product unit is sold to the customer by the manufacturer.
ShipDate	Type dateTime
	Properties Create, Filter, Nillable, Sort, Update
	Description The date when the product was shipped to end customer. Available in API version 58.0 and later.
ShippedTransactionIdentifier	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The identifier of the transaction between distributor and end customer or ship to account. Available in API version 58.0 and later.
TotalAdjustmentAmount	Type currency
	Properties Create, Filter, Nillable, Sort, Update
	Description The total amount adjusted on the rebate claim. Available in API version 58.0 and later.
TransactionIdentifier	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The unique identifier of the transaction between the manufacturer and distributor. Available in API version 58.0 and later.
UsageType	Type picklist
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort
	Description Specifies the usage type of the rebate claim.

Field	Details
	Possible value is:
	• Automotive
	PriceProtection—Price Protection
	• Rebates
	The default value is Rebates. Available in API version 58.0 and later.

Rebate Claim Adjustment

Represents information about the adjustments made to the rebate claim. This object is available in API version 58.0 and later.

Supported Calls

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

Field	Details
AdjustmentAmount	Type currency
	Properties Create, Filter, Sort, Update
	Description The adjustment amount for the rebate claim.
ApprovedDate	Type date
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The date when the rebate claim adjustment was approved.
Comments	Type string
	Properties Create, Filter, Group, Sort, Update
	Description The details about the adjustment made to the rebate claim.

Field	Details
CurrencyIsoCode	Туре
	picklist
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description The currency ISO code associated with the record. This is available when multiple currencies are enabled.
	Possible values are:
	• EUR—Euro
	• USD—U.S. Dollar
	The default value is EUR.
LastReferencedDate	Туре
	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	Туре
	string
	Properties
	Create, Filter, Group, idLookup, Sort, Update
	Description The name of the rebate claim adjustment.
RebateClaimId	Туре
	reference
	Properties
	Create, Filter, Group, Sort
	Description
	The rebate claim record to which the adjustment was made.
	This field is a relationship field.

Field	Details
	Relationship Name RebateClaim
	Relationship Type Lookup
	Refers To RebateClaim
Status	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description The status of the adjustment made to the rebate claim.
	Possible values are:
	• Approved
	• InReview—Under Review
	• Rejected
	The default value is InReview.

RebateMemberAggregateItem

Represents a junction between a rebate member product aggregate and a transaction journal. This object is available in API version 54.0 and later.

Supported Calls

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

Field	Details
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.

Field	Details
LastViewedDate	Туре
	dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate is not null, the user accessed this record or list view indirectly.
Name	Type string
	Properties
	Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description Name of the rebate member aggregate item.
OwnerId	Type reference
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description ID of the owner of this object.
	This field is a polymorphic relationship field.
	Relationship Name Owner
	Relationship Type Lookup
	Refers To Group, User
PriorTransactionAmount	Type
	currency
	Properties Create, Filter, Nillable, Sort, Update
	Description The transaction amount of the associated transaction journal record that contributes to aggregation for the configured prior period.
PriorTransactionQuantity	Type double
	Properties Create, Filter, Nillable, Sort, Update

Field	Details
	Description The transaction quantity of the associated transaction journal record that contributes to aggregation for the configured prior period.
RebateAmount	Type currency
	Properties Create, Filter, Nillable, Sort, Update
	Description The rebate amount for the associated transaction journal record.
RebateMemberProductAggregateI	d Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The rebate member product aggregate record associated with the transaction journal record.
	This is a relationship field.
	Relationship Name RebateMemberProductAggregate
	Relationship Type Lookup
	Refers To RebateMemberProductAggregate
TransactionAmount	Type currency
	Properties Create, Filter, Nillable, Sort, Update
	Description The transaction amount for the transaction journal record associated with the aggregate item record.
TransactionJournalId	Туре
	reference
	Properties Create, Filter, Group, Sort, Update
	Description The transaction journal associated with the rebate aggregated transaction journal record.
	This is a relationship field.
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Field	Details
	Relationship Name TransactionJournal
	Relationship Type Lookup
	Refers To TransactionJournal
TransactionQuantity	Type double
	Properties Create, Filter, Nillable, Sort, Update
	Description The transaction quantity of the associated transaction journal record.

Rebate Member Claim Aggregate

Represents information about the aggregated claim quantity and amount for a rebate member per product. This object is available in API version 58.0 and later.

Supported Calls

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

Field	Details
CurrencyIsoCode	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description The currency ISO code associated with the record. This is available when multiple currencies are enabled.
	Possible values are:
	• EUR—Euro
	• USD—U.S. Dollar
	The default value is EUR.

Field	Details
LastReferencedDate	Type dateTime
	Properties
	Filter, Nillable, Sort
	Description The most recent date on which a user referenced this record.
LastViewedDate	Type dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The most recent date on which a user viewed this record.
Name	Туре
	string
	Properties Control of the Control of
	Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description The auto-generated name of the rebate member claim aggregate.
OwnerId	Type reference
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	The ID of the rebate member claim aggregate record owner.
	This field is a polymorphic relationship field.
	Relationship Name Owner
	Relationship Type
	Lookup
	Refers To Group, User
PriceType	Туре
	Picklist
	Properties Croate Defaulted an greate Filter Croup Nillable Destricted mighligt Cost Hadate
	Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update.

Field	Details
	Description Specifies the basis on which the product was sold in a rebate claim. Used to distinguish between standard and contract pricing strategies when calculating rebate eligibility.
ProductId	Type reference
	Properties Create, Filter, Group, Sort, Update
	Description The product for which the rebate claim was made.
	This field is a relationship field.
	Relationship Name Product
	Relationship Type Lookup
	Refers To Product2
RebateProgramMemberId	Type reference
	Properties Create, Filter, Group, Sort, Update
	Description The rebate program member for whom the claim was made.
	This field is a relationship field.
	Relationship Name RebateProgramMember
	Relationship Type Lookup
	Refers To RebateProgramMember
TotalClaimedAmount	Type currency
	Properties Create, Filter, Sort, Update
	Description The total amount that's already claimed.
TotalClaimedQuantity	Type double

Field	Details
	Properties Create, Filter, Sort, Update
	Description The total product quantity that's already claimed.

RebateMemberProductAggregate

Stores the post calculation summary of journal transactions by member, period, and rebate type. For example, ABC enterprises for May 2021 against Vol Rebate on Radius category, did a total quantity of 150 units and transaction amount of \$80,000. This object is available in API version 65.0 and later.

Supported Calls

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

Field	Details
AggregateReferenceNumber	Type string
	Properties Create, Filter, Group, idLookup, Nillable, Sort, Update
	Description A unique reference number of the aggregate record that's assigned by the Data Processing Engine when generating Rebate Program Member Aggregate records. This reference number can be used to relate Rebate Member Aggregate Item records to the aggregate record.
	Available in API version 54.0 and later.
GrowthAmount	Туре
	currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The difference between the total amount and the prior amount in the rebate aggregate.
GrowthAmountPercent	Type double
	Properties Create, Filter, Nillable, Sort, Update

Field	Details
	Description The difference between the total amount and the prior amount in percentage in the rebate aggregate.
GrowthQuantity	Type double
	Properties Create, Filter, Nillable, Sort, Update
	Description The difference between the total quantity and the previous quantity in the transaction journal associated with the rebate aggregate.
GrowthQuantityPercent	Type double
	Properties Create, Filter, Nillable, Sort, Update
	Description The quantity growth in percentage.
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate is not null, the user accessed this record or list view indirectly.
Name	Type string
	Properties Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description Name of the rebate member product aggregate.

Field	Details
OwnerId	Type reference
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description ID of the owner of this object.
	This field is a polymorphic relationship field.
	Relationship Name Owner
	Relationship Type Lookup
	Refers To Group, User
PriorTotalQuantity	Type double
	Properties Create, Filter, Nillable, Sort, Update
	Description The quantity in the corresponding payout period of the previous rebate cycle.
PriorTotalTransactionAmount	Type currency
	Properties Create, Filter, Nillable, Sort, Update
	Description The total transaction amount corresponding to the prior period.
ProductId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The product associated with the rebate aggregation.
ProgramRebateTypeId	Type reference
	Properties Create, Filter, Group, Sort, Update
	Description The program rebate type associated with the rebate aggregation.

Field	Details
RebatePayoutStatus	Туре
	picklist
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	The status of the aggregate rebate payout to the member.
	Possible values are:
	• Error
	• InProgress
	• Success
	The default value is InProgress.
RebatePayoutStatusMessage	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The status message of the aggregate rebate payout to the member.
RebateProgramMemberId	Туре
	reference
	Properties
	Create, Filter, Group, Sort, Update
	Description
	The rebate program member associated with the rebate aggregation.
RebateProgramPayoutPeriodId	Туре
	reference
	Properties
	Create, Filter, Group, Sort, Update
	Description
	The rebate program payout period associated with the rebate aggregation.
RollupProgramMemberId	Туре
	reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description
	The immediate parent account in the hierarchy of the account (rebate program member) associated with the product aggregate. This field is available in API version 52.0 and later.
	This is a relationship field.

Field	Details
	Relationship Name
	RollupProgramMember
	Relationship Type Lookup
	Refers To RebateProgramMember
TotalQuantity	Type double
	Properties Create, Filter, Nillable, Sort, Update
	Description The sum of values in transaction journal quantity fields associated with the rebate aggregation.
TotalTransactionAmount	Туре
	currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The sum of values in transaction journal transaction amount fields associated with the rebate aggregation.
TransactionJournalId	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The transaction journal associated with the program rebate type.

Rebate Partner Special Prc Trm

Represents information about the special pricing term for a ship and debit program. This object is available in API version 58.0 and later.

Supported Calls

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

Field	Details
CurrencyIsoCode	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description The currency ISO code associated with the record. This is available when multiple currencies are enabled.
	Possible values are:
	• EUR—Euro
	• USD—U.S. Dollar
	The default value is EUR.
Discount	Type double
	Properties
	Create, Filter, Nillable, Sort, Update
	Description The agreed discount for a product unit between the manufacturer and the distributor as part of the special pricing terms for a ship and debit program. Between ReferencePricePerUnit and Discount, only one field can be added or used.
IsDiscountByPercent	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether the discount is given by percentage (true) or amount (false).
	The default value is false.
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The most recent date on which a user referenced this record.
LastViewedDate	Type dateTime

Field	Details
	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 user-defined name of the rebate partner special pricing term.
OwnerId	Type reference
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description The ID of the rebate partner special pricing term.
	This field is a polymorphic relationship field.
	Relationship Name Owner
	Relationship Type Lookup
	Refers To Group, User
ProductId	Type reference
	Properties Create, Filter, Group, Sort, Update
	Description The product associated with the rebate partner special pricing term.
	This field is a relationship field.
	Relationship Name Product
	Relationship Type Lookup
	Refers To Product2

Field	Details
ProductQtyUnitOfMeasureId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The unit of measure associated with the product quantity.
	This field is a relationship field.
	Relationship Name ProductQtyUnitOfMeasure
	Relationship Type Lookup
	Refers To UnitOfMeasure
ProductQuantity	Type double
	Properties Create, Filter, Sort, Update
	Description The threshold quantity for a product agreed between the manufacturer and the distributor as part of the special pricing terms for a ship and debit program.
RebateProgramMemberId	Type reference
	Properties Create, Filter, Group, Sort, Update
	Description The rebate program member associated with the rebate partner special pricing term.
	This field is a relationship field.
	Relationship Name RebateProgramMember
	Relationship Type Lookup
	Refers To RebateProgramMember
ReferencePricePerUnit	Type
	Create, Filter, Nillable, Sort, Update

Field	Details
	Description The price of a product unit that's agreed upon between the manufacturer and the distributor as part of the special pricing term. Between ReferencePricePerUnit and Discount, only one field can be added or used.
SalePricePerUnit	Type currency
	Properties Create, Filter, Sort, Update
	Description The actual price of each unit of the product that's sold to the partner by the manufacturer.
Status	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description The status of the rebate partner special pricing term.
	Possible values are:
	• Active
	• Draft
	• Inactive
	The default value is Draft.

RebatePayment

Tracks if the payment has been generated for this member for back end processing. This object is available in API version 51.0 and later.

Supported Calls

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

Field	Details	
Amount	Type currency	
	carrettey	

Field	Details
	Properties Create, Filter, Sort, Update Description Amount to be paid out.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description Name of the rebate program.
PaymentDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description Date when payment is issued.
Status	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Status of the payout. Possible values are: Generated Paid Rejected

RebatePayoutAdjustment

Rebate amount adjustment that needs to be given manually. An adjustment is an amount added or subtracted to the calculated rebate amount. This object is available in API version 51.0 and later.

Supported Calls

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

Field	Details
AdjustmentAmount	Туре
	currency
	Properties Create, Filter, Sort, Update
	Description Value of the adjustment.
ApprovedDate	Type date
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Approved date of the adjustment.
Comments	Туре
	string
	Properties Create, Filter, Group, Sort, Update
	Description Notes for adjustment.
Name	Туре
	string
	Properties
	Create, Filter, Group, idLookup, Sort, Update
	Description Name of the rebate program.
RebateProgramMemberPayoutId	Type reference
	Properties
	Create, Filter, Group, Sort
	Description Rebate program member payout identifier.
Status	Туре
	picklist
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update

Field	Details
	Description
	Status of adjustment.
	Possible values are:
	• Approved
	InReview—Under Review
	• Rejected

RebateProgram

The rebate program your organization runs with a single account, all accounts, or specific list of accounts. This object is available in API version 51.0 and later.

Supported Calls

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

Field	Details
Description	Туре
	textarea
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The description of the rebate program.
EndDate	Туре
	date
	Properties
	Create, Filter, Group, Sort, Update
	Description
	The end date of the rebate program.
Frequency	Туре
	picklist
	Properties
	Create, Filter, Group, Restricted picklist, Sort, Update

Field	Details
	Description
	The frequency of rebate program.
	Possible values are:
	• Annually
	• Biannually
	• CustomPeriods
	• Monthly
	• OnDemand
	• ProgramStartAndEndDate
	• Quarterly
GracePeriodDayCount	Туре
	int
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Number of days from end date of an instance of a payout period. Transactions submitted
	until this day are considered for rebate calculation. For example, a value of 5 implies that channel partners can submit transactions for a monthly period before the 5th of the next
	month. This isn't enforced in the system but can be used as information for channel partners.
Name	Туре
	string
	Properties
	Create, Filter, Group, idLookup, Sort, Update
	Description
	Name of the rebate program.
PayoutCalculationDayCount	Туре
	int
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Number of days from period end date. The payment will be calculated after this date. For example, a payout calculation day count of 14 means 14 days after period end date.
	example, a payout calculation day count of 14 means 14 days after period end date.
ProgramReferenceNumber	Туре
	string
	Properties
	Create, Filter, Group, idLookup, Nillable, Sort, Update

Field	Details	
	Description	
	The reference number assigned to this rebate program. This field is unique within your	
	organization. This field is available in API version 52.0 and later.	
RebateProgramUrl	Туре	
	url	
	Properties	
	Create, Filter, Group, Nillable, Sort, Update	
	Description	
	URL of the rebate program.	
StartDate	Туре	
	date	
	Properties	
	Create, Filter, Group, Sort, Update	
	Description	
	Start date of rebate program.	
Status	Туре	
	picklist	
	Properties	
	Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update	
	Description	
	Possible states of rebate program.	
	Possible values are:	
	• Active	
	• Draft	
	• Inactive	
Туре	Туре	
	picklist	
	Properties	
	Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update	
	Description	
	The type of the rebate program. Available in API version 58.0 and later.	
	Possible values are:	
	• ShipAndDebit	
	• Standard	
	The default value is Standard.	

RebateProgramMember

The member of a rebate program. By virtue of being a member, the partner or business account is eligible to get rebate payments. For example, ABC Enterprises and HVAC Corp are members of GoldStone Volume Rebate Program. This object is available in API version 51.0 and later.

Supported Calls

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

Field	Details
AccountId	Type reference
	Properties Create, Filter, Group, Sort, Update
	Description Unique identifier for the account who's a member of the program.
CumulativePayoutAmount	Type currency
	Properties Filter, Nillable, Sort
	Description Total rebate amount for a member. Sum of Total Payout Amount values from RebateProgramMemberPayout object that are not rejected.
	This is a calculated field.
IsPayoutCalcSkipped	Type boolean
	Properties
	Description Specifies whether the rebate payout calculation should be skipped for the rebate program member. This field is available in API version 52.0 and later.
LastActivationDate	Type date
	Properties Filter, Group, Nillable, Sort

Field	Details
	Description The latest date on which the program member was activated.
LastDeactivationDate	Type date
	Properties Filter, Group, Nillable, Sort
	Description The latest date on which the program member was deactivated.
MemberStatus	Type picklist
	Properties
	Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update
	Description Status of membership.
	Possible values are:
	• Active
	• Inactive
Name	Type string
	Properties Create, Filter, Group, idLookup, Sort, Update
	Description Name of the member.
RebateProgramId	Type reference
	Properties Create, Filter, Group, Sort, Update
	Description Reference to rebate program identifier.
ShipToAccountId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The ship to account. Use this when the rebate is applicable only when the member ships to this account. This field is available in API version 52.0 and later.

Field	Details
	This is a relationship field.
	Relationship Name ShipToAccount
	Relationship Type Lookup
	Refers To Account

RebateProgramMemberPayout

The payout calculated for a member for the period. For example, \$1000 Jan'21 payout for ABC enterprises. This object is available in API version 51.0 and later.

Supported Calls

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

Field	Details
AccruedAmount	Type currency
	Properties Filter, Nillable, Sort
	Description The payout amount accrued by the rebate program member. This is a calculated field.
CalculatedRebateAmount	Type currency
	Properties Filter, Nillable, Sort
	Description Total amount calculated.
	This is a calculated field.
CalculationDate	Type date

Details
Properties Create, Filter, Group, Nillable, Sort, Update
Description Date on which the calculation happened.
Type reference
Properties Create, Filter, Group, Sort
Description Program member ID.
Type string
Properties Create, Filter, Group, idLookup, Sort, Update
Description Name of the rebate program.
Type picklist
Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update
Description Status of payout.
Possible values are:
• Approved
• Interim—Calculation In progress.
Pending—Under review.
RejectedSystemCalculated—Calculated.
Туре
currency
Properties Filter, Nillable, Sort
Description
Summarized payout adjustment amount.
This is a calculated field.

Field	Details
TotalRebateAmount	Type currency
	Properties Filter, Nillable, Sort
	Description Summarized payout amount. This is a calculated field.

Rebate Program Payout Period

The period of the payout calculation. For example, 1st to 31st Jan, or 1st Dec to 14th Dec. This object is available in API version 51.0 and later.

Supported Calls

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

Field	Details
EndDate	Type date
	Properties Create, Filter, Group, Sort, Update
	Description End date of the period. The system picks transactions between start date and end date of the period for rebate calculations.
LastCalculationDate	Type date
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Last date on which the rebate amount calculation for that period for all the relevant aggregate records was completed successfully.
MemberPayoutCount	Type int

Field	Details
	Properties Filter, Group, Nillable, Sort
	Description Used to track total number of payouts that happened in a period for a particular rebate program.
PayoutCalculationDate	Type date
	Properties Create, Filter, Group, Sort, Update
	Description Date on or after which the payout calculation for this period is set to Closed.
RebateProgramId	Type reference
	Properties Create, Filter, Group, Sort
	Description Rebate program identifier.
StartDate	Type date
	Properties Create, Filter, Group, Sort, Update
	Description Start date of the period.
Status	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update
	Description Used to track if a payout period is active or inactive.
	Possible values are:
	• Active
	• Closed
	• Inactive
TotalApprovedAmount	Type currency

Field	Details
	Properties Filter, Nillable, Sort
	Description Total approved member payout amount.
TotalRejectedAmount	Type currency
	Properties Filter, Nillable, Sort
	Description Total rejected amount.
TransactionGracePeriodDate	Type date
	Properties Create, Filter, Group, Sort, Update
	Description Cut-off date before which the transactions are accepted for the period.

Rebate Ptnr Spcl Prc Trm Bnft

Represents information about the benefit tier in a rebate partner special pricing term. This object is available in API version 58.0 and later.

Supported Calls

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

Field	Details
CurrencyIsoCode	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description The currency ISO code associated with the record. This is available when multiple currencies are enabled.

Field	Details
	Possible values are:
	• EUR—Euro
	• USD—U.S. Dollar
	The default value is EUR.
Discount	Type double
	Properties Create, Filter, Nillable, Sort, Update
	Description The discount that's applicable for the rebate partner special pricing term benefit.
EffectiveEndDate	Type dateTime
	Properties Create, Filter, Nillable, Sort, Update
	Description The date until when the rebate partner special pricing term benefit is effective.
EffectiveStartDate	Type dateTime
	Properties Create, Filter, Nillable, Sort, Update
	Description The date from when the rebate partner special pricing term benefit is effective.
IsDiscountByPercent	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether the discount is given by percentage (true) or amount (false).
	The default value is false.
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The most recent date on which a user referenced this record.

Field	Details
LastViewedDate	Туре
	dateTime
	Properties Filter, Nillable, Sort
	Description The most recent date on which a user viewed this record.
MaximumQuantity	Type double
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The maximum quantity of product sold that is eligible for the rebate partner special pricing term benefit.
MinimumQuantity	Туре
	double
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The minimum quantity of product sold that is eligible for the rebate partner special pricing term benefit.
Name	Туре
	string
	Properties
	Create, Filter, Group, idLookup, Sort, Update
	Description
	The name of the rebate partner special pricing term benefit.
RebatePartnerSpecialPrcTrmId	Type reference
	Properties Create, Filter, Group, Sort
	Description The rebate partner special pricing term that's associated with the rebate partner special pricing term benefit.
	This field is a relationship field.
	Relationship Name RebatePartnerSpecialPrcTrm

Field	Details
	Relationship Type Lookup
	Refers To RebatePartnerSpecialPrcTrm
ReferencePricePerUnit	Type currency
	Properties Create, Filter, Nillable, Sort, Update
	Description The reference price per unit that's applicable for the rebate partner special pricing term benefit.

ReceivedDocument

Allows partners to upload .CSV document. This object is available in API version 51.0 and later.

Supported Calls

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

Field	Details
FailedRecordsFileId	Type reference
	Properties Filter, Group, Nillable, Sort, Update
	Description Lookup to the error file.
Name	Type string
	Properties Create, Filter, Group, idLookup, Sort, Update
	Description The name of the received document.

Field	Details
Status	Type picklist
	Properties Create, Filter, Group, Restricted picklist, Sort, Update
	Description
	Current stage of processing.
	Possible values are:
	APPROVED—Approved
	ARCHIVED—Archived
	• DRAFT—Draft
	• IN_REVIEW—In Review
	OBSOLETE—Obsolete
	• SUBMITTED—Submitted
	SUPERSEDED—Superseded
UnprocessedRecordsFileId	Type reference
	Properties Filter, Group, Nillable, Sort, Update
	Description Lookup to the skipped file.

TransactionJournal

The transactions that need to be processed for a rebate program. For example, order line for 1000 units of \$1200 for member ABC enterprises. This object is available in API version 51.0 and later.

Supported Calls

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

Field	Details
AccountId	Type reference

Field	Details
	Properties Crosta Filter Croup Nillable Cort Undete
	Create, Filter, Group, Nillable, Sort, Update
	Description The account for which the transaction is made.
	This is a relationship field.
	Relationship Name Account
	Relationship Type Lookup
	Refers To Account
ActivityDate	Type dateTime
	Properties Create, Filter, Sort, Update
	Description Date the transaction happened.
ErrorDescription	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Description of the error in the journal record.
JournalDate	Type dateTime
	Properties Create, Filter, Nillable, Sort, Update
	Description Date the transaction was received.
MemberId	Type reference
	Properties Create, Filter, Group, Sort, Update
	Description Polymorphic key to RebateProgramMember or LoyaltyMember.

Field	Details
ProductId	Туре
	reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The product associated with the transaction.
Quantity	Type double
	Properties Create, Filter, Nillable, Sort, Update
	Description The order quantity.
QuantityUnitOfMeasureId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The unit of measure associated with the record.
	This is a relationship field.
	Relationship Name QuantityUnitOfMeasure
	Relationship Type Lookup
	Refers To UnitOfMeasure
RebatePgmReferenceNumber	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The reference number of the rebate program. This field is available in API version 52.0 and later.
ShipToAccountId	Туре
	reference
	Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The account for which the additional benefit is being offered for ship and debit program. This field is available in API version 52.0 and later.
	This is a relationship field.
	Relationship Name ShipToAccount
	Relationship Type Lookup
	Refers To Account
TransactionAmount	Type currency
	Properties Create, Filter, Nillable, Sort, Update
	Description The total amount of the transaction.
UsageType	Type picklist
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort
	Description Type of journal record.
	Possible values are:
	• Loyalty
	• Rebates

UnitOfMeasureConversion

Represents the information used to convert a measurement value from a unit of measure to another. This object is available in API version 52.0 and later.

Supported Calls

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

Fields

Field	Details
ConversionFactor	Type double
	Properties Create, Filter, Sort, Update
	Description The conversion factor for the conversion.
FromUnitOfMeasureId	Type reference
	Properties Create, Filter, Group, Sort, Update
	Description The unit of measure to be converted.
	This is a relationship field.
	Relationship Name From Unit Of Measure
	Relationship Type Lookup
	Refers To UnitOfMeasure
ToUnitOfMeasureId	Type reference
	Properties Create, Filter, Group, Sort, Update
	Description The unit of measure to be converted to.
	This is a relationship field.
	Relationship Name ToUnitOfMeasure
	Relationship Type Lookup
	Refers To UnitOfMeasure

Associated Objects

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

UnitOfMeasureConversionFeed

Feed tracking is available for the object.

UnitOfMeasureConversionHistory

History is available for tracked fields of the object.

Unit Of Measure Conversion Owner Sharing Rule

Sharing rules are available for the object.

Unit Of Measure Conversion Share

Sharing is available for the object.

REBATE MANAGEMENT STANDARD INVOCABLE ACTIONS

Add members to a rebate program, calculate rebate amounts and upsert payouts, generate rebate payout periods, process rebate calculation batch jobs, and process a rebate CSV file for Rebate Management. For more information on standard invocable actions, see **REST API Developer Guide** and **Actions Developer Guide**.

Add Rebate Member List

Add a list of members to a rebate program. The list of rebate members is based on the accounts in the specified account list view.

Calculate Rebate Amount and Upsert Payout

Calculate the rebate amount and upsert the rebate payout for the specified aggregate record.

Calculate Projected Rebate Amount

Calculate the projected rebate amount for rebate types associated with a specified transaction reference ID.

Generate Rebate Payout Periods

Generate payout periods for a rebate program based on the frequency specified in the program.

Get Benefit and Calculate Rebate Amount

Get the details benefits and optionally calculate the rebate amount for the specified aggregate record.

Get Eligible Program Rebate Types

Retrieve the eligible program rebate types for a mapped object.

Process Program Rebate Type Products

Insert or delete the records in the Program Rebate Type Product object. The inserted products participate as inclusion or exclusion as defined in the Product Filter Type option on Program Rebate Type.

Process Rebate Batch Calculation Jobs

Process a rebate batch calculation job from the Data Processing Engine.

Process Rebate CSV Files

Process an uploaded CSV file using Bulk API 2.0 and convert the file's data into records in the target object.

Upsert Custom Rebate Payout

Upsert the custom calculated rebate payout for a specified aggregate record.

Add Rebate Member List

Add a list of members to a rebate program. The list of rebate members is based on the accounts in the specified account list view.

This object is available in API version 51.0 and later for users with Rebate Management license.

Supported REST HTTP Methods

URI

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

Formats

JSON, XML

HTTP Methods

GET, HEAD, POST

Authentication

Authorization: Bearer token

Inputs

Input	Details
listViewId	Туре
	string
	Description
	Required. The ID of the account list that's specified to add rebate members.
notificationPreference	Туре
	string
	Description
	A text value that indicates whether notifications should be sent for successful and unsuccessful
	rebate member additions. Valid values include BlockSuccessEmails, BlockFailureEmails,
	BlockAllEmails, and AllowAllNotifications.
rebateProgramId	Туре
	string
	Description
	Required. The ID of the rebate program to which specified account list view is added.
status	Туре
	string
	Description
	Required. The status of the rebate members for the accounts in the specified list view.

Usage

Sample Request

```
"inputs":[{
    "listViewId":"a07B0000007qbQ0IAY",
    "rebateProgramId":"x18Z1236547qbQ0BCV",
    "status": "Active"
    "notificationPreference": "BlockAllEmails"
}]
}
```

Sample Response

```
{
   "isSuccess":true
}
```

Calculate Rebate Amount and Upsert Payout

Calculate the rebate amount and upsert the rebate payout for the specified aggregate record.

This object is available in API version 51.0 and later for users with Rebate Management license.

Supported REST HTTP Methods

URI

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

Formats

JSON, XML

HTTP Methods

GET, HEAD, POST

Authentication

Authorization: Bearer token

Inputs

Input	Details
aggregateId	Type ID
	Description Required. The ID of the aggregate record for which you want to calculate the rebate amount and upsert the rebate payout.
payoutMemberFieldName	Type String
	Description The name of the field that contains the rebate program member ID for which to perform the payout calculations.

Outputs

Usage

Sample Request

```
{
   "inputs":[
          {"aggregateId":"a00xx000000cCtxAAE"},
          {"aggregateId":"a00xx000000cCvZAAU"},
           {"aggregateId":"a00xx000000cCxBAAU"}
]
}
```

Sample Response

```
"errors":null,
"isSuccess":true,
"outputValues":{
    "programRebateTypePayoutSourceId":"Ontxx00004000002AAA"
}
```

Calculate Projected Rebate Amount

Calculate the projected rebate amount for rebate types associated with a specified transaction reference ID.

This object is available in API version 54.0 and later.

Supported REST HTTP Methods

URI

 $/services/data/v \textbf{\textit{XX}}.\textbf{\textit{X}}/actions/standard/calculate \texttt{Projected Rebate Amount}$

Formats

JSON

HTTP Methods

POST

Authentication

```
Authorization: Bearer token
```

Inputs

Input	Details
programRebateTypeIds	Туре
	string
	Description Required. The list of program rebate type IDs to calculate the projected rebate amounts for.
referenceRecordId	Type string
	Description Required. The transaction reference record ID to calculate the projected rebate amounts for.

Outputs

Output	Details
calculateProjectedRebateAmount	Туре
	string
	Description The calculated rebate amount details for the program rebate types associated with the transaction reference record.
	This is an Apex output type that contains nested arrays in JSON format. calculateProjectedRebateAmount contains an array of the CalculateProjectedRebateAmountOutputRepresentation Apex class. This output representation contains an array of the ProjectedRebateAmountCalc fields, while an array of DetailedProjectedRebateAmountCalc is contained in ProjectedRebateAmountCalc.



🕜 Note: The fields aggregateId, benefitQualifierValue, benefitTier, measureFieldValue, qualifiedTiers, rebateTypeBenefit, totalProjectedRebateAmount, payoutPeriod, projectedRebateAmount can appear in the output list. These fields must be ignored because they aren't supported in the flow for this invocable action. These fields will be deprecated in API version 55.0.

Usage

JSON Sample Request

```
"inputs":[ {
  "programRebateTypeIds": ["0hvRM0000004CUt"],
  "referenceRecordId": "801RM00000083TeYAI"
```

```
} 1
}
```

JSON Sample Response

```
"projectedRebateAmountCalc": [
 {
    "programRebateTypeId": "0hvRM0000004CUt",
    "referenceRecordId": "801RM00000083TeYAI",
    "totalProjectedRebateAmount": 1088000,
    "detailedProjectedRebateAmountCalc": [
        "benefitQualifierValue": 500,
        "benefitTier": "0huRM0000004CRC",
        "rebateTypeBenefit": "5",
        "measureFieldValue": 160000,
        "payoutPeriod": "0i7RM0000004CV7",
        "projectedRebateAmount": 800000,
        "qualifiedTiers": [
          "0huRM0000004CRC"
        1
      },
      {
        "benefitQualifierValue": 240,
        "benefitTier": "OhuRM0000004CRC",
        "rebateTypeBenefit": "5",
        "measureFieldValue": 57600,
        "payoutPeriod": "0i7RM0000004CV7",
        "projectedRebateAmount": 288000,
        "qualifiedTiers": [
          "0huRM0000004CRC"
      }
    ]
  }
]
```

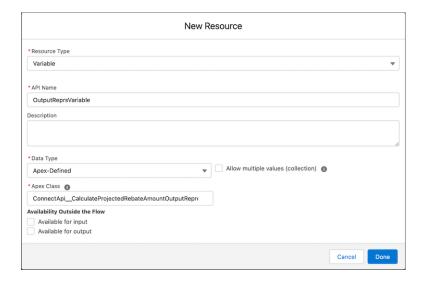
Details of the Apex output type

- projectedRebateAmountCalc—An array of projected rebate amounts. Each item specifies the projected rebate amount for a passed rebate type and the reference object.
 - programRebateTypeId—Specifies the program rebate type ID whose projected rebate amounts are calculated in this
 item.
 - referenceRecordId—Specifies the transaction reference record ID based on which the projected rebate amounts are calculated.
 - totalProjectedRebateAmount—Specifies the total projected rebate amount for this program rebate type and reference record.
 - detailedProjectedRebateAmountCalc—An array with each item corresponding to each aggregate record that is
 found for a combination of rebate type and reference object. For example, if the rebate is computed differently for every product
 using a benefit mapping and the reference object (order) has two order lines, this collection has two aggregates, one for each
 product.

- benefitQualifierValue—Specifies the total benefit qualifier value calculated from both the aggregate record and the reference object.
- benefitTier—Specifies the benefit tier ID that is determined based on the benefit qualifier value.
- rebateTypeBenefit—Specifies the applied benefit that is granted based on the benefit tier identified.
- measureFieldValue—Specifies the total measure value calculated from both the aggregate record and the reference object.
- payoutPeriod—Specifies the rebate program payout period that is determined based on the mapped member ID and activity date. The mapping between reference object and transaction journal is used here. See Map Fields Between Target Transaction Object and Transaction Journal.
- projectedRebateAmount—Specifies the calculated projected rebate amount based on the benefit tier and the measure field value.
- qualifiedTiers—List of the eligible benefit tiers that have already been met.

Usage

You must configure the output parameter for the Calculate Projected Rebate Amount Flow Action in Flow Builder. The following screen illustrates how to use the output parameter in the Flow Builder.



Generate Rebate Payout Periods

Generate payout periods for a rebate program based on the frequency specified in the program.

This object is available in API version 51.0 and later for users with Rebate Management license.

Supported REST HTTP Methods

URI

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

Formats

JSON, XML

HTTP Methods

GET, HEAD, POST

Authentication

Authorization: Bearer token

Inputs

Input	Details
rebateProgramId	Type ID
	Description Required. The ID of the rebate program record for which you want to generate payout periods.

Outputs

Output	Details
rebateProgramPayoutPeriods	Type string
	Description The list of rebate program payout period IDs upserted if the request is successful.

Usage

Sample Request

Sample Response

```
"errors":null,
   "isSuccess":true,
   "RebateProgramPayoutPeriodIds":["Ontxx00004000002AAA","Ontxx00004000002AAB"]
},{
   "errors":null,
   "isSuccess":true,
   "RebateProgramPayoutPeriodIds":["Ontxx00004000002AAA","Ontxx00004000002AAB"]
}
```

Get Benefit and Calculate Rebate Amount

Get the details benefits and optionally calculate the rebate amount for the specified aggregate record.

This object is available in API version 51.0 and later for users with Rebate Management license.

Supported REST HTTP Methods

URI

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

Formats

JSON, XML

HTTP Methods

GET, HEAD, POST

Authentication

Authorization: Bearer token

Inputs

Input	Details
aggregateId	Type ID
	Description Required. The ID of the aggregate record for which you want to calculate the rebate amount.
payoutMemberFieldName	Type ID
	Description The name of the field that contains the rebate program member ID for which to perform the payout calculations.
skipRebateCalc	Type Boolean
	Description Indicates whether to skip calculation of the rebate amount.

Outputs

Output	Details
accuralRate	Type Double

Output	Details
	Description The accrual rate if the request is successful.
accruedAmount	Type Double
	Description The accrued amount calculated if the request is successful.
aggregateId	Type ID
	Description The ID of the aggregate record for which you want to calculate the rebate amount.
benefitId	Type ID
	Description The ID of the applied Program Rebate Type Benefit record if the request is successful.
payoutMemberFieldName	Туре
	String
	Description The name of the field that contains the rebate program member ID for which to perform the payout calculations.
qualifyingBenefits	Type string
	Description The comma-separated list of IDs of the qualified Program Rebate Type Benefit records if the request is successful.
rebateAmount	Type double
	Description
	The rebate amount calculated if the request is successful.

Usage

Sample Request

```
"inputs":[
     {"AggregateId": "a00xx000000cCtxAAE",
      "SkipRebateCalc": false},
```

```
{"AggregateId": "a00xx000000cCvZAAU",
    "SkipRebateCalc": false},
    {"AggregateId": "a00xx000000cCxBAAU",
     "SkipRebateCalc": false}
]
```

Sample Response

```
"errors":null,
"isSuccess":true,
"outputValues":{
    "AggregateId":"0ntxx00004000002AAA",
    "BenefitId":"0ntxx00004000002AAA",
    "RebateAmount":"2000"
}
```

Get Eligible Program Rebate Types

Retrieve the eligible program rebate types for a mapped object.

For more information about how to use the getEligibleProgramRebateTypes action in Flow Builder, see Configure the Output Parameter for the Get Eligible Program Rebate Types Flow Action in Flow Builder in Salesforce Help.

This object is available in API version 52.0 and later.

Supported REST HTTP Methods

URI

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

Formats

JSON

HTTP Methods

POST

Authentication

Authorization: Bearer token

Inputs

Input appliedRebateTypesLimit Type integer Description The maximum number of search results to be returned for the applied rebate types. The input value is passed through to the output parameter.

Input	Details
	This field is available in API version 54.0 and later.
appliedRebateTypesOffset	Туре
Input	integer
	Description
	The input offset for the applied rebate types search results plus the number of applied rebates types processed. Used to process applied rebate types in a loop. When all applied rebate types have been processed, zero is returned.
	This field is available in API version 54.0 and later.
limit	Type
	integer
	Description The maximum number of search results to be returned for the eligible rebate types.
measureTypeFilter	
medbareryperireer	Type
	array
	Description Filters the eligible rebate types by the specified measure type.
offset	Type integer
	Description The offset for the eligible rebate types search results. The offset parameter specifies the end of the last batch retrieved. For example, to retrieve 100 rebate types at a time:
	Request the first 100 with an offset of 0.
	 Request the second 100 with an offset of 100.
	Request the third 100 with an offset of 200.
queryOnlyIntegrableProgram	Туре
RebateTypes	boolean
	Description
	Indicates whether only integrable program rebate types must be queried.
referenceObjectIds	Туре
	array
	Description Required. The list of IDs of the mapped object for which to get the eligible rebate types.
searchByRebateTypeName	Туре
	string

Input	Details
-------	---------

Description

Searches the eligible rebate types by the specified name.

Outputs

Output	Details
resultantRebateTypes	Type string
	Description The list of eligible and applied rebate type IDs for the mapped object. Use with API calls.
resultantRebateTypes ForFlow	Type string
	Description The list of eligible and applied rebate type IDs for the mapped object. Use with Flow Builder. This field is available in API version 54.0 and later.

Usage

JSON Sample Request

```
"inputs":[{
    "referenceObjectIds":["01cxx00004000002AAA","01cxx00004000002AAB"],
    "queryOnlyIntegratableProgramRebateTypes": true,
    "limit": 10,
    "offset": 5
}]
```

JSON Sample Response

```
"appliedRebateTypesLimit": 5,
     "appliedRebateTypesOffset" 9,
     "errors":null
  resultantRebateTypesV2:{
     "isSuccess":true,
     "programRebateTypeIDs":[
         {ReferenceObjectID: "Olcxx00004000002AAA", eligibleRebateTypes:
[01cxx00004000003AAA,01cxx0000400003AAB], appliedRebateTypes:
[01cxx00004000004AAA,01cxx00004000004AAB]},
         {ReferenceObjectID: "01cxx00004000002AAB", eligibleRebateTypes:
[01cxx00004000003AAC,01cxx00004000003AAD], appliedRebateTypes:
[01cxx00004000005AAA,01cxx00004000005AAB]}
     ],
     "limit": 10,
     "offset": 13,
     "appliedRebateTypesLimit": 5,
     "appliedRebateTypesOffset": 9,
     "errors":null
```

Process Program Rebate Type Products

Insert or delete the records in the Program Rebate Type Product object. The inserted products participate as inclusion or exclusion as defined in the Product Filter Type option on Program Rebate Type.

For more information about how the processProgramRebateTypeProducts action inserts or deletes records, see Create Payout Calculation Flows with Flow Actions in Salesforce Help.

This object is available in API version 53.0 and later.

Supported REST HTTP Methods

URI

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

Formats

JSON

HTTP Methods

POST

Authentication

Authorization: Bearer token

Inputs

operationType Type
operationType Type string

Description Required. The type of operation to be performed on the program rebate type product records. Possible values are:

- Delete—Deletes all program rebate type products for the specified program rebate type
- Insert—Inserts all products as program rebate type products, preserves the existing ones.

productListViewId

Type

string

Description

The ID of the product list view containing the products to be added to the inclusion or exclusion list of this program rebate type.



Note: This field isn't used when the type of operation is Delete.

programRebateTypeId

Type

string

Description

Required. The ID of the program rebate type for which the records are being processed.

Usage

JSON Sample Request

```
"inputs":[{
    "operationType" : "insert",
    "productListViewId": "00BHr00000Q6zqNMAR",
    "programRebateTypeId": "0hvHr000000HDQQIA4"
}]
```

Process Rebate Batch Calculation Jobs

Process a rebate batch calculation job from the Data Processing Engine.

This object is available in API version 51.0 and later for users with Rebate Management license.

Supported REST HTTP Methods

URI

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

Formats

JSON, XML

HTTP Methods

GET, HEAD, POST

Authentication

Authorization: Bearer token

Inputs

Input	Details
calcDefinitionId	Type ID
	Description Required. The ID of the data processing engine definition record that you want to process.
rebateProgramIds	Type array
	Description The list of IDs of the rebate program records that the custom batch calculation job processes.
programRebateTypeIds	Type array
	Description The list of IDs of the program rebate type records that the custom batch calculation job processes.
rebateProgramPayoutPeriodIds	Type array
	Description The list of IDs of the rebate program payout period records that the custom batch calculation job processes.
rebateProgramMemberIds	Type
	array Description The list of IDs of the rebate program member records that the custom batch calculation job processes.

Outputs

Output	Details
batchJobId	Type ID

Output	Details
	Description
	The ID of the generated batch job record after the request is successful.
accepted	Туре
	boolean
	Description Indicates whether the rebate batch calculation job is accepted.

Usage

Sample Request

```
"inputs":[{
        "calcDefinitionId": "01cxx00004000002AAA",
        "rebateProgramIds": ["0htxx00004000002AAA","0htxx00004000002bAA"],
        "programRebateTypeIds": ["0htxx00004000002AAA","0htxx00004000002bAA"],
        "rebateProgramPayoutPeriodIds": ["0htxx00004000002AAA","0htxx00004000002bAA"],
        "rebateProgramMemberIds": ["0htxx00004000002AAA","0htxx00004000002bAA"]
}]
}
```

Sample Response

```
"errors":null,
"isSuccess":true,
"outputValues":{
    "batchJobId":"Ontxx00004000002AAA",
    }
}
```

Process Rebate CSV Files

Process an uploaded CSV file using Bulk API 2.0 and convert the file's data into records in the target object.

This object is available in API version 51.0 and later for users with Rebate Management license.

Supported REST HTTP Methods

URI

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

Formats

JSON, XML

HTTP Methods

GET, HEAD, POST

Authentication

Authorization: Bearer token

Inputs

Input	Details
recordId	Type
	Description
	Required. The ID of the received document record that includes the CSV file to be converted.
entityAPIName	Type string
	Description Required. The API name of the target object that receives the processed CSV file records.
lineEnding	Type string
	Description Optional. The line ending request header that specifies whether the line endings can be read either as line feeds (LFs) or as line feeds (CRLFs) for fields of type Text Area and Text Area (Long). The default value is LF.

Usage

Sample Request

```
"inputs":[{
    "recordId": "0io4S00000TPsyQAG",
    "entityAPIName" : "TransactionJournal"
}]
}
```

Sample Response

```
{
  "errors":null,
  "isSuccess":true,
}
```

Upsert Custom Rebate Payout

Upsert the custom calculated rebate payout for a specified aggregate record.

This object is available in API version 51.0 and later for users with Rebate Management license.

Supported REST HTTP Methods

URI

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

Formats

JSON, XML

HTTP Methods

GET, HEAD, POST

Authentication

Authorization: Bearer token

Inputs

Input	Details
accuralRate	Type Double
	Description The accrual rate used to calculate the accrued amount for the generated program rebate type payout source record.
accruedAmount	Type Double
	Description The accrued amount calculated for the generated program rebate type payout source record.
aggregateId	Type ID
	Description Required. The ID of the aggregate record for which you want to upsert the rebate payout.
benefitId	Type ID
	Description The ID of the qualified program rebate type benefit record for which you want to upsert the rebate payout.
payoutMemberFieldName	Type String
	Description The name of the field that contains the rebate program member ID for which to perform the payout calculations.

Input	Details
rebateAmount	Type double
	Description Required. The rebate amount for which you want to upsert the rebate payout.

Outputs

Output	Details
progranRebateTypePayoutSourceId	Туре
	ID
	Description
	The ID of the program rebate type payout source record, which is generated after the request is successful.

Usage

Sample Request

```
"inputs":[{
    "AggregateId":"01cxx00004000002AAA",
    "BenefitId":"0htxx00004000002AAA",
    "RebateAmount":"2000"
}]
```

Sample Response

```
{
  "errors":null,
  "isSuccess":true,
  "outputValues":{
      "programRebateTypePayoutSourceId":"Ontxx00004000002AAA",
  }
}
```

REBATE MANAGEMENT METADATA API TYPES

Metadata API enables you to access some types and feature settings that you can customize in the user interface. For more information about Metadata API and to find a complete reference of existing metadata types, see **Metadata API Developer Guide**.

ObjectHierarchyRelationship

Represents an organization's custom field mappings between a reference object and eligible rebate types. Fields can be mapped from Opportunity, OpportunityLineltem, Quote, QuoteLineltem, and Contract to TransactionJournal.

ObjectHierarchyRelationship

Represents an organization's custom field mappings between a reference object and eligible rebate types. Fields can be mapped from Opportunity, Oppo

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

File Suffix and Directory Location

ObjectHierarchyRelationship components have the suffix ObjectHierarchyRelationship.settings and are stored in the ObjectHierarchyRelationship folder.

Version

ObjectHierarchyRelationship components are available in API version 51.0 and later.

Fields

Field Name	Description
childObjectMapping	Field Type ObjectMapping
	Description
	Set of inputObject, mappingFields, and outputObject entries.
inputObjRecordsGrpFieldName	Field Type string
	Description
	The field name in the input object used to group the records. This field is available in API version 55.0 and later.
mappingType	Field Type Obil liggraph Managing Tune (an unequation of tune string)
	ObjHierarchyMappingType (enumeration of type string)

Field Name	Description
	Description Specifies the type of relationship between two objects.
	Valid values are:
	• ChildToChild
	• ParentToChild
	• ParentToParent
	• Support
	This field is available in API version 55.0 and later.
masterLabel	Field Type string
	Description
	Master label name of the mapping definition.
outputPntRelationshipFieldName	Field Type string
	Description The field name that defines the relationship between a parent and child for the output object. This field is available in API version 55.0 and later.
parentObjectMapping	Field Type ObjectMapping
	Description Required.
	Set of inputObject, mappingFields, and outputObject entries.
parentRecord	Field Type string
	Description The parent record for this object hierarchy relationship. This field is available in API version 55.0 and later.
parentRelationshipFieldName	Field Type string
	Description Name of the field that defines the relationship between the parent and child.
usageType	Field Type MappingUsageType (enumeration of type string) Description Required.

Field Name	Description	
	Name of the usage type of an object hierarchy relationship.	
	Valid value is:	
	 ConvertToSalesAgreement 	
	 CLMFieldMapping 	
	 EligibleProgramRebateType 	
	 MapJournalToMemberAggregate 	
	 TransformationMapping 	

ObjectMapping

Represents a set of inputObject, mappingFields, and outputObject entries.

Fields

Field Name	Description	
inputObject	Field Type	
	string	
	Description Required.	
	Name of the input object type containing the source fields for mapping. For example, Opportunity or OpportunityLineItem.	
	Note: You can also use a custom object as the input object type.	
mappingFields	Field Type ObjectMappingField	
	Description	
	Mapping of source object input fields to target object.	
outputObject	Field Type	
	string	
	Description	
	Required.	
	Name of the output object type receiving data conversion. For example, Transaction Journal.	

ObjectMappingField

Represents a set of inputField and outputField entries.

Fields

Field Name	Field Type	Description
inputField	string	Field Type string
		Description Required.
		Field in the object specified by the inputObject field in ObjectMapping on page 238. This field is mapped to the field in outputField, which is a field in the object specified by the outputObject field in ObjectMapping on page 238.
		Note: You can also use custom fields as the input field type.
outputField	string	Field Type string
		Description Required.
		Field in the object specified by the outputObject field in ObjectMapping on page 238. This field is mapped to the field name in inputField, which is a field in the object specified by the inputObject field in ObjectMapping on page 238.
		Note: You can also use custom fields as the output field type.

Declarative Metadata Sample Definition

The following are examples of a ObjectHierarchyRelationship component.

Example of mapping between Opportunity and Transaction Journal.

Example of mapping between Quote and Transaction Journal.

```
<?xml version="1.0" encoding="UTF-8"?>
<ObjectHierarchyRelationship xmlns="http://soap.sforce.com/2006/04/metadata">
  <parentObjectMapping>
     <inputObject>Quote</inputObject>
     <outputObject>TransactionJournal
     <mappingFields>
       <inputField>AccountId</inputField>
       <outputField>MemberId/outputField>
     </mappingFields>
  </parentObjectMapping>
  <childObjectMapping>
     <inputObject>QuoteLineItem</inputObject>
     <outputObject>TransactionJournal
    <mappingFields>
       <inputField>Product2Id</inputField>
       <outputField>ProductId</outputField>
     </mappingFields>
     <mappingFields>
       <inputField>Quantity</inputField>
       <outputField>Quantity</outputField>
     </mappingFields>
  </childObjectMapping>
  <usageType>EligibleProgramRebateType</usageType>
</ObjectHierarchyRelationship>
```

Example of mapping between Contract and Transaction Journal.

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

Usage

Use the deploy () call to deploy metadata with a .zip file. Every .zip file contains a project manifest, a file that's named package.xml, and a set of directories that contain the components. The manifest file defines the components that you're trying to retrieve or deploy in the .zip file. The manifest also defines the API version that's used for the deployment or retrieval. For more information on the .zip file, deploying, and retrieving the metadata, see Deploying and Retrieving Metadata with the Zip File. You can also deploy and retrieve the metadata API using Postman.

Wildcard Support in the Manifest File

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

DATA PROCESSING ENGINE, BATCH MANAGEMENT, AND MONITOR WORKFLOW SERVICES

Data Processing Engine and Batch Management help automate your business processes. Use objects, APIs, Platform Events, and invocable actions to define, run, and review Data Processing Engine definitions and Batch Management jobs.

Here's how both these features can automate your business processes:

- Data Processing Engine: Transform data that's available in your Salesforce org and write back
 the transformation results as new or updated records. You can transform the data for standard
 and custom objects.
- Batch Management: Automate the processing of records in scheduled flows. You can process a high volume of standard and custom object records.

Once a Data Processing Engine definition is run or a Batch Management job is run, you can view the progress of the run and the results of the run using Monitor Workflow Services.

Data Model

Data Processing Engine, Batch Management, and Monitor Workflow Servics share a data model. Let's learn about the objects and relationships in this shared data model.

Common Tooling API Object

BatchJobDefinition is a common Tooling API object that is shared between Data Processing Engine and Batch Management.

Common Platform Event

Batch Management jobs and Data Processing Engine definitions are run using invocable actions in Flows. Use the Batch Job Status Changed event to notify subscribers after a Batch Management job or a Data Processing Engine definition is processed in a flow.

Common Business APIs

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

Data Processing Engine

Transform data that's available in your Salesforce org and write back the transformation results as new or updated records. You can transform the data for standard and custom objects. Data Processing Engine consists of a Tooling API object, a standard object, a Metadata API, and an invocable action. You can use these to view, create, edit, and run Data Processing Engine definitions.

Batch Management

Automate the processing of records in scheduled flows. You can process a high volume of standard and custom object records. Batch Management consists of three Tooling API objects, a standard object, a Metadata API, and an invocable action. You can use these resources to view, create, edit, and run Batch Management jobs.

Monitor Workflow Services

The Montior Workflow Services standard objects can be used to track the run of Data Processing Engine definitions and Batch Management jobs. During a run, you can view details about each part that the run is broken down into. After the run is complete, you can view its status and the records which weren't processed during the run.

EDITIONS

Available in: Lightning Experience

Available in: Data
Processing Engine is
available with Enterprise,
Unlimited, and Performance
Editions with the Financial
Services Cloud, Loyalty
Management,
Manufacturing Cloud,
Rebate Management,
Accounting Subledger, or
Provider Search in Health
Cloud.

Available in: Batch
Management is available
with Enterprise, Unlimited,
and Performance Editions
with the Loyalty
Management,
Manufacturing Cloud,
Rebate Management, or
Accounting Subledger

Data Model

Data Processing Engine, Batch Management, and Monitor Workflow Servics share a data model. Let's learn about the objects and relationships in this shared data model.

Here's the data model:

Data Processing Engine, Batch Management, and Monitor Workflow Services Batch Job Definition Batch Job Definition Batch Job Definition Batch Job Part Batch Job Part Failed Record Batch Job Part Failed Record Data Processing Engine Batch Management Monitor Workflow Services --- Setup Object Standard Object

EDITIONS

Available in: Lightning Experience

Available in: Data
Processing Engine is
available with Enterprise,
Unlimited, and Performance
Editions with the Financial
Services Cloud, Loyalty
Management,
Manufacturing Cloud,
Rebate Management,
Accounting Subledger, or
Provider Search in Health
Cloud.

Available in: Batch
Management is available
with Enterprise, Unlimited,
and Performance Editions
with the Loyalty
Management,
Manufacturing Cloud,
Rebate Management, or
Accounting Subledger

Common Tooling API Object

BatchJobDefinition is a common Tooling API object that is shared between Data Processing Engine and Batch Management.

Tooling API objects let you interact with metadata for declarative development. For example, you can create your own version of Setup.

BatchJobDefinition

Represents the definition of a batch job. This object is available in API version 51.0 and later.

BatchJobDefinition

Represents the definition of a batch job. This object is available in API version 51.0 and later.



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

Supported SOAP API Calls

describeSObjects(), query(), retrieve()

Supported REST API Methods

GET, HEAD, Query

Fields

Field	Details		Details	
Description	Туре			
	textarea			
	Properties			
	Filter, Group, Nillable, Sort			
	Description			
	The description of the batch job definition.			
DeveloperName	Туре			
	string			
	Properties			
	Filter, Group, Sort			
	Description			
	The developer name of the batch job.			
Language	Туре			
	picklist			
	·			

EDITIONS

Available in: Lightning Experience

Available in: Data
Processing Engine is
available with Enterprise,
Unlimited, and Performance
Editions with the Financial
Services Cloud, Loyalty
Management,
Manufacturing Cloud,
Rebate Management,
Accounting Subledger, or
Provider Search in Health
Cloud.

Available in: Batch Management is available with Enterprise, Unlimited, and Performance Editions with the Loyalty Management, Manufacturing Cloud, Rebate Management, or Accounting Subledger Field Details

Properties

Filter, Group, Restricted picklist, Sort

Description

The language in which the batch job is created.

Possible values are:

- af—Afrikaans
- am—Amharic
- ar—Arabic
- ar AE—Arabic (United Arab Emirates)
- ar BH—Arabic (Bahrain)
- ar DZ—Arabic (Algeria)
- ar EG—Arabic (Egypt)
- ar IQ—Arabic (Iraq)
- ar JO—Arabic (Jordan)
- ar_KW—Arabic (Kuwait)
- ar_LB—Arabic (Lebanon)
- ar_LY—Arabic (Libya)
- ar MA—Arabic (Morocco)
- ar OM—Arabic (Oman)
- ar_QA—Arabic (Qatar)
- ar SA—Arabic (Saudi Arabia)
- ar_SD—Arabic (Sudan)
- ar SY—Arabic (Syria)
- ar TN—Arabic (Tunisia)
- ar YE—Arabic (Yemen)
- bg—Bulgarian
- bn—Bengali
- bs—Bosnian
- ca—Catalan
- cs—Czech
- cy—Welsh
- da—Danish
- de—German
- de AT—German (Austria)
- de BE—German (Belgium)
- de CH—German (Switzerland)
- de LU—German (Luxembourg)
- el—Greek

Field Details

- en AU—English (Australian)
- en CA—English (Canadian)
- en GB—English (UK)
- en нк—English (Hong Kong)
- en_IE—English (Ireland)
- en IN—English (Indian)
- en MY—English (Malaysian)
- en NZ—English (New Zealand)
- en PH—English (Phillipines)
- en SG—English (Singapore)
- en US—English
- en ZA—English (South Africa)
- eo—Esperanto (Pseudo)
- es—Spanish
- es AR—Spanish (Argentina)
- es BO—Spanish (Bolivia)
- es CL—Spanish (Chile)
- es CO—Spanish (Colombia)
- es CR—Spanish (Costa Rica)
- es DO—Spanish (Dominican Republic)
- es EC—Spanish (Ecuador)
- es GT—Spanish (Guatemala)
- es HN—Spanish (Honduras)
- es_MX—Spanish (Mexico)
- es NI—Spanish (Nicaragua)
- es PA—Spanish (Panama)
- es PE—Spanish (Peru)
- es PR—Spanish (Puerto Rico)
- es PY—Spanish (Paraguay)
- es SV—Spanish (El Salvador)
- es US—Spanish (United States)
- es UY—Spanish (Uruguay)
- es_VE—Spanish (Venezuela)
- et—Estonian
- eu—Basque
- fa—Farsi
- fi—Finnish
- fr—French

- fr_BE—French (Belgium)
- fr CA—French (Canadian)
- fr CH—French (Switzerland)
- fr LU—French (Luxembourg)
- ga—Irish
- gu—Gujarati
- hi—Hindi
- hr—Croatian
- hu—Hungarian
- hy—Armenian
- in—Indonesian
- is—Icelandic
- it—Italian
- it CH—Italian (Switzerland)
- iw—Hebrew
- iw EO—Esperanto RTL (Pseudo)
- ja—Japanese
- ka—Georgian
- km—Khmer
- kn—Kannada
- ko—Korean
- 1b—Luxembourgish
- lt—Lithuanian
- lv—Latvian
- mi—Te reo
- mk—Macedonian
- ml—Malayalam
- mr—Marathi
- ms—Malay
- mt—Maltese
- my—Burmese
- nl_BE—Dutch (Belgium)
- nl NL—Dutch
- no—Norwegian
- pl—Polish
- pt_BR—Portuguese (Brazil)
- pt_PT—Portuguese (European)
- rm—Romansh

Field	Details
	• ro—Romanian
	• ro_MD—Romanian (Moldova)
	• ru—Russian
	• sh—Serbian (Latin)
	• sh_ME—Montenegrin
	• sk—Slovak
	• s1—Slovene
	• sq—Albanian
	• sr—Serbian (Cyrillic)
	• sv—Swedish
	• sw—Swahili
	• ta—Tamil
	• te—Telugu
	• th—Thai
	• tl—Tagalog
	• tr—Turkish
	• uk—Ukrainian
	• ur—Urdu
	• vi—Vietnamese
	• xh—Xhosa
	• zh_cn—Chinese (Simplified)
	• zh_нк—Chinese (Hong Kong)
	• zh_sg—Chinese (Singapore)
	• zh_TW—Chinese (Traditional)
	• zu—Zulu
MasterLabel	Туре
	string
	Properties
	Filter, Group, Sort
	Description
	The label of the batch job.
ProcessGroup	Туре
	string
	Properties
	Filter, Group, Sort

Field	Details
	Description The group or team that's using the batch job. This field is only applicable to Batch Management jobs.
Status	Type picklist
	Properties Defaulted on create, Filter, Group, Restricted picklist, Sort
	Description The status of the batch job.
	Possible values are:
	• Active
	• Inactive
Type	Type picklist
	Properties Defaulted on create, Filter, Group, Restricted picklist, Sort
	Description The type of batch job.
	Possible values are:
	Calc—Data Processing Engine
	• DecisionTableRefresh
	• Flow

Common Platform Event

Batch Management jobs and Data Processing Engine definitions are run using invocable actions in Flows. Use the BatchJobStatusChanged event to notify subscribers after a Batch Management job or a Data Processing Engine definition is processed in a flow.

Batch Job Status Change d Event

Notifies subscribers of when a batch job is completed in a flow. This object is available in API version 51.0 and later.

BatchJobStatusChangedEvent

Notifies subscribers of when a batch job is completed in a flow. This object is available in API version 51.0 and later.

Supported Calls

describeSObjects()

Supported Subscribers

Subscriber	Supported?
Flows	✓

EDITIONS

Available in: Lightning Experience

Available in: Data
Processing Engine is
available with Enterprise,
Unlimited, and Performance
Editions with the Financial
Services Cloud, Loyalty
Management,
Manufacturing Cloud,
Rebate Management,
Accounting Subledger, or
Provider Search in Health
Cloud.

Available in: Batch Management is available with Enterprise, Unlimited, and Performance Editions with the Loyalty Management, Manufacturing Cloud, Rebate Management, or Accounting Subledger

Field	Details
BatchJob	Туре
	string
	Description
	The unique identifier of the batch job.
BatchJobDefinition	Туре
	string
	Properties
	Nillable
	Description
	The unique identifier of the batch job's definition.
EndDateTime	Туре
	dateTime

Field	Details
	Properties
	Nillable
	Description The timestamp for when the batch job execution is complete.
	The timestamp for when the bater job execution is complete.
EventUuid	Туре
	string
	Properties
	Nillable
	Description A universally unique identifier (UUID) that identifies a platform event message. This field is available in API version 52.0 and later.
ReplayId	Туре
	string
	Properties Nillable
	Description
	Represents an ID value that is populated by the system and refers to the position of the event in the event stream. Replay ID values aren't guaranteed to be contiguous for consecutive events. A subscriber can store a replay ID value and use it on resubscription to retrieve missed events that are within the retention window.
StartDateTime	Туре
	dateTime
	Properties
	Nillable
	Description The timestamp for when the batch job execution is started.
Status	Туре
	picklist
	Properties Restricted picklist
	Description
	The status of the batch job.
	Possible values are:
	• Canceled—Canceled
	• Failure
	• Success

Common Business APIs

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

REST Reference

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

REST Reference

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

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

Resources

Here's a list of Common Business API resources.

Response Bodies

Here's a list of Common Business API response bodies.

SEE ALSO:

Connect REST API Developer Guide

Resources

Here's a list of Common Business API resources.

Batch Job Cancel

Cancel a batch job of type data processing engine (calc job) and batch management. A batch job with only the status Submitted or In Progress can be canceled.

Batch Job Cancel

Cancel a batch job of type data processing engine (calc job) and batch management. A batch job with only the status Submitted or In Progress can be canceled.

Special Access Rules

To use this resource, the following permissions are required:

- Your org must have the Batch Management and Data Processing Engine licenses
- Users in your org require System Administration profile

Resource

/connect/batch-job/batchJobId/cancel-job

Resource example

/connect/batch-job/0mdxx0000000fxAAA/cancel-job

Available version

52.0

Requires Chatter

No

HTTP methods

POST



Note: POST doesn't take request parameters or a request body.

Response body for POST

Returns HTTP 201 on success.

See Batch Job Cancel Output for HTTP code descriptions that are unique to this resource in case of failure of the batch job cancel request.

Response Bodies

Here's a list of Common Business API response bodies.

Batch Job Cancel Output

Output representation of the batch job cancel request.

Batch Job Cancel Output

Output representation of the batch job cancel request.

Property Name	Туре	Description	Filter Group and Version	Available Version
message	String	Details about why the batch job cancel request failed.	Small, 52.0	52.0

This table lists HTTP response code descriptions that are unique to this resource.

HTTP Response Code	Error Code	Description
400	INVALID_STATUS	We can't cancel the batch job that doesn't have an active run. Specify the ID of a batch job with an active run and try again.
400	INVALID_STATUS	We can't cancel the batch job that is already canceled or completed. Specify the ID of a valid batch job with the status InProgress or Submitted and try again.
400	DELETE_FAILED	We can't cancel the batch job of which the results are already being written back.
400	DELETE_FAILED	We can't cancel the batch job because of an error in processing your org's data. Run the Data Processing Engine definition and try again.

HTTP Response Code	Error Code	Description
403	FORBIDDEN	You don't have the permission to cancel a batch job. Ask your Salesforce admin for help.
404	RESOURCE_NOT_FOUND	Specify the ID of a valid batch job and try again.
500	INTERNAL_SERVER_ERROR	Something went wrong when we tried to cancel the batch job. Try again or ask your Salesforce admin for help.

Data Processing Engine

Transform data that's available in your Salesforce org and write back the transformation results as new or updated records. You can transform the data for standard and custom objects. Data Processing Engine consists of a Tooling API object, a standard object, a Metadata API, and an invocable action. You can use these to view, create, edit, and run Data Processing Engine definitions.

Data Processing Engine Tooling API Objects

Data Processing Engine consists of one Tooling API object, BatchCalcJobDefinition. Use this object to create and edit a Data Processing Engine definition.

Data Processing Engine Standard Object

Data Processing Engine contains one standard object, BatchCalcJobDefinitionView. Use this object to view all the Data Processing Engine definitions available in your Salesforce org, including file-based definitions.

Data Processing Engine Metadata API

Use a Metadata API to create, update, and activate Data Processing Engine definitions.

Data Processing Engine Invocable Actions

Run an active Data Processing Engine definition. For more information on custom invocable actions, see **REST API Developer Guide** and **Actions Developer Guide**.

EDITIONS

Available in: Lightning Experience

Available in: Data
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Services Cloud, Loyalty
Management,
Manufacturing Cloud,
Rebate Management,
Accounting Subledger, or
Provider Search in Health
Cloud.

Data Processing Engine Tooling API Objects

Data Processing Engine consists of one Tooling API object, BatchCalcJobDefinition. Use this object to create and edit a Data Processing Engine definition.

Tooling API objects let you interact with metadata for declarative development. For example, you can create your own version of Setup.

BatchCalcJobDefinition

Represents a Data Processing Engine (DPE) definition. This object is available in API version 51.0 and later.

BatchCalcJobDefinition

Represents a Data Processing Engine (DPE) definition. This object is available in API version 51.0 and later.



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

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Management,
Manufacturing Cloud,
Rebate Management,
Accounting Subledger, or
Provider Search in Health
Cloud.

Supported SOAP API Calls

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

Supported REST API Methods

DELETE, GET, HEAD, PATCH, POST, Query

Field	Details
BatchJobDefinitionId	Type reference
	Properties Filter, Group, Nillable, Sort
	Description The unique identifier of the associated batch job definition.
	This is a relationship field.
	Relationship Name BatchJobDefinition
	Relationship Type Lookup
	Refers To BatchJobDefinition

Field	Details
DataSpaceApiName	Туре
	string
	Properties
	Filter, Group, Nillable, Sort
	Description The Data Space API name from Data Cloud.
DefinitionRunMode	Type picklist
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description The execution mode of the Data Processing Engine definition.
	Possible values are:
	• Batch
	OnDemand—This value is reserved for internal use.
	The default value is Batch.
DeveloperName	Туре
	string
	Properties Filter, Group, Sort
	Description The developer name of the Data Processing Engine definition.
DoesGenAllFailedRecords	Type boolean
	Properties Defaulted on create, Filter, Group, Sort
	Description Indicates whether the error file includes a complete list of all failed writeback records (true) or not (false). The default value is false, and only the first instance of a failure is recorded in the error file. If set to true, all failed records are recorded in the error file for the writeback node.
	Available in API version 65.0 and later.
ExecutionPlatformObjectType	Туре
	Picklist
	Properties Filter, Group, Nillable, Restricted picklist, Sort

Field	Details	
	Description Required. The execution platform object type that's used during the read, transform, and writeback process for the Data Processing Engine definition. Possible values are:	
	• CalculatedInsightsObject	
	• DataLakeObject	
	• DataModelObject	
	• None	
	Available in API version 65.0 and later.	
ExecutionPlatformType	Type Picklist	
	Properties Filter, Group, Restricted picklist, Sort, Not-Nillable	
	Description Specifies the platform that's used to run the Data Processing Engine definition. Possible values:	
	CRMA—CRM Analytics	
	CDP— Data Cloud	
	• CORE—This value is reserved for internal use.	
FullName	Type string	
	Properties Create, Group, Nillable	
	Description The name of the Data Processing Engine definition.	
	Query this field only if the query result contains no more than one record. Otherwise, an error is returned. If more than one record exists, use multiple queries to retrieve the records. This limit protects performance.	
IsTemplate	Type boolean	
	Properties	
	Defaulted on create, Filter, Group, Sort	
	Description	
	Indicates whether this is a template Data Processing Engine definition.	
Language	Type picklist	
	Properties Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort	

Field	Details	
	Description The language in which this Data Processing Engine definition is created.	
ManageableState	Type ManageableState enumerated list	
	Properties Filter, Group, Nillable, Restricted picklist, Sort	
	Description Indicates the manageable state of the specified component that is contained in a package:	
	• beta	
	• deleted	
	• deprecated	
	• deprecatedEditable	
	• installed	
	• installedEditable	
	• released	
	• unmanaged	
MasterLabel	Туре	
	string	
	Properties	
	Filter, Group, Sort	
	Description The label of the Data Processing Engine definition.	
Metadata	Туре	
	complexvalue	
	Properties Create, Nillable, Update	
	Description Data Processing Engine definition's metadata.	
	Query this field only if the query result contains no more than one record. Otherwise, an error is returned. If more than one record exists, use multiple queries to retrieve the records. This limit protects performance.	
NamespacePrefix	Туре	
	string	
	Properties	
	Filter, Group, Nillable, Sort	

Description

The namespace prefix associated with this object. Each Developer Edition organization that creates a managed package has a unique namespace prefix. Limit: 15 characters. You can refer to a component in a managed package by using the

namespacePrefix componentName notation.

The namespace prefix can have one of the following values:

- In Developer Edition organizations, the namespace prefix is set to the namespace prefix of the organization for all objects that support it. There's an exception if an object is in an installed managed package. In that case, the object has the namespace prefix of the installed managed package. This field's value is the namespace prefix of the Developer Edition organization of the package developer.
- In organizations that aren't Developer Edition organizations, NamespacePrefix is
 only set for objects that are part of an installed managed package. There's no namespace
 prefix for all other objects.

ProcessType

Type

picklist

Properties

Filter, Group, Restricted picklist, Sort

Description

Required. The process type for which the Data Processing Engine definition is created.

Possible values are:

- AccountingPeriodClosure—Legal Entity Accounting Period Closure—Available in API version 62.0 and later.
- ActionableList
- AdvancedAccountForecast
- BenefitManagement—Available in API version 61.0 and later.
- BillingSchedulesforInvoiceGeneration—Billing Schedules for Invoice Generation—Available in API version 62.0 and later.
- CDPEnrichment
- Channel Inventory Management—Available in API version 63.0 and later.
- CollectionsAndRecovery
- CriteriaBsdSearchAndFilter Criteria-Based Search And Filter
- DataProcessingEngine Standard
- DecisionMatrixDataUpload-This value is available only if you have Business Rules Engine enabled.
- Decisiontable—Decision table activation—Available in API version 62.0 and later.
- Education
- EmployeeService—Available in API version 63.0 and later.
- Financial Summary Rollup—Available in API version 63.0 and later.

- ForeignExchangeGainLossCalculations
- FSCHierarchyRollUp
- Fundraising
- FundraisingRollups—Available in API version 63.0 and later.
- GeneralLedgerAccountBalancesSummary
- InventoryBatchSearch
- InventorySearch
- InvoiceGeneration—Available in API version 62.0 and later.
- LegalEntityAccountingPeriodClosureAdvanced—Available in API version 63.0 and later.
- LifeSciencesCommercialTerritoryAlignment—Available in API version 63.0 and later.
- LifeSciencesCustomerEngagement
- Loyalty
- LoyaltyPartnerManagement
- LoyaltyPointsAggregation
- NetZero
- NextGenForecasting—Available in API version 62.0 and later.
- PatientServicesProgram
- PnmRosterFileUpload—Available in API version 62.0 and later.
- PriceProtection—Available in API version 62.0 and later.
- ProductCatalogManagement—Available in API version 63.0 and later.
- ProgramBasedBusiness
- ProgramManagementRollups
- Rebates
- RecordAggregation
- RevenueTransactionManagement—Available in API version 63.0 and later.
- AccountingSubledger—This value is reserved for internal use.
- ProviderSearch—This value is reserved for internal use.
- Recruitment—Available in API version 62.0 and later.
- SalesAgreement—Available in API version 63.0 and later.
- StockRotation
- UsageManagement—Available in API version 62.0 and later.

When Data Processing Engine is enabled for a Salesforce org, the default value is 'Standard'. Other process types may be available to you depending on the licenses available in your org.

Data Processing Engine Standard Object

Data Processing Engine contains one standard object, BatchCalcJobDefinitionView. Use this object to view all the Data Processing Engine definitions available in your Salesforce org, including file-based definitions.

BatchCalcJobDefinitionView

Represents the details of a Data Processing Engine definition. The definition can also be a file-based definition that is available in your Salesforce org. This object is available in API version 51.0 and later.

BatchCalcJobDefinitionView

Represents the details of a Data Processing Engine definition. The definition can also be a file-based definition that is available in your Salesforce org. This object is available in API version 51.0 and later.



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

EDITIONS

Available in: Lightning Experience

Available in: Data Processing Engine is available with Enterprise, Unlimited, and Performance Editions with the Financial Services Cloud, Loyalty Management, Manufacturing Cloud, Rebate Management, Accounting Subledger, or Provider Search in Health Cloud.

Supported Calls

describeSObjects(), query()

Field	Details		
DataSpaceApiName	Type string		
	Properties Filter, Group, Nillable, Sort		
	Description Stores the data space API name from Data Cloud.		
DefinitionRunMode	Type picklist		
	Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update		
	Description The execution mode of the Data Processing Engine definition.		
	Possible values are:		
	BatchOnDemand—On Demand		
	The default value is Batch.		

Field	Details		
Description	Туре		
	string		
	Properties		
	Filter, Group, Nillable, Sort		
	Description		
	The description of a Data Processing Engine definition.		
DurableId	Туре		
	string		
	Properties		
	Filter, Group, Nillable, Sort		
	Description		
	The unique identifier for the field. Always retrieve this value before using it, as the value isn't guaranteed to stay the same from one release to the next. Simplify queries by using this field instead of making multiple queries.		
ExecutionPlatformObjectType	Туре		
	picklist		
	Properties		
	Filter, Group, Nillable, Restricted picklist, Sort		
	Description		
	Specifies the execution platform object type used to read, transform, and write back processes during the execution of a Data Processing Engine definition. This field is available in API version 65.0 and later.		
	Possible values are:		
	CalculatedInsightsObject—Calculated Insights Object		
	DataLakeObject—Data Lake Object		
	DataModelObject—Data Model Object		
	• None		
ExecutionPlatformType	Type Picklist		
	Properties		
	Filter, Group, Restricted picklist, Sort, Not-Nillable		
	Description		
	Specifies the platform that's used to run the Data Processing Engine definition. Possible values:		
	CRMA: CrmAnalytics		
	CDP: DataCloudForMarketing		

Field	Details		
InstalledPackageName	Type string Properties Filter, Group, Nillable, Sort Description The name of the package used to add the definition to the org.		
IsActive	Type boolean Properties Defaulted on create, Filter, Group, Sort Description Indicates whether the definition is active.		
IsTemplate	Type boolean Properties Defaulted on create, Filter, Group, Sort Description Indicates whether the definition is a template. You can make a copy of a template definition and update it based on your requirements.		
LastModifiedBy	Type string Properties Filter, Group, Nillable, Sort Description The unique identifier of the user who modified the definition last.		
ManageableState	Type picklist Properties Filter, Group, Nillable, Restricted picklist, Sort Description Indicates the manageable state of the definition if it's contained in a package. Possible values are: beta—Managed-Beta deleted—Managed-Proposed-Deleted deprecated—Managed-Proposed-Deprecated deprecatedEditable—SecondGen-Installed-Deprecated installed—Managed-Installed		

Field	Details			
	• installedEditable—SecondGen-Installed-Editable			
	• released—Managed-Released			
	• unmanaged—Unmanaged			
MasterLabel	Туре			
	string			
	Properties			
	Filter, Group, Nillable, Sort			
	Description The label of the Data Processing Engine definition.			
Name	Туре			
	string			
	Properties Filter, Group, Nillable, Sort			
	Description			
	The name of the Data Processing Engine definition.			
NamespacePrefix	Type string			
	Properties			
	Filter, Group, Nillable, Sort			
	Description The namespace prefix associated with this object. Each Developer Edition organization that creates a managed package has a unique namespace prefix. Limit: 15 characters. You can refer to a component in a managed package by using the namespacePrefix_componentName notation.			
	The namespace prefix can have one of the following values:			
	 In Developer Edition organizations, the namespace prefix is set to the namespace prefix of the organization for all objects that support it. There's an exception if an object is in an installed managed package. In that case, the object has the namespace prefix of the installed managed package. This field's value is the namespace prefix of the Developer Edition organization of the package developer. 			
	 In organizations that aren't Developer Edition organizations, NamespacePrefix is only set for objects that are part of an installed managed package. There's no namespace prefix for all other objects. 			
ProcessType	Туре			
	picklist			
	Properties			
	Filter, Group, Nillable, Restricted picklist, Sort			

Description

The process type of the definition.

Possible values are:

- AccountingPeriodClosure—Legal Entity Accounting Period Closure—Available in API version 62.0 and later.
- ActionableList
- AdvancedAccountForecast
- BenefitManagement—Available in API version 61.0 and later.
- BillingSchedulesforInvoiceGeneration—Billing Schedules for Invoice Generation—Available in API version 62.0 and later.
- CDPEnrichment
- Channel Inventory Management—Available in API version 63.0 and later.
- CollectionsAndRecovery
- CriteriaBsdSearchAndFilter Criteria-Based Search And Filter
- DataProcessingEngine Standard
- DecisionMatrixDataUpload-This value is available only if you have Business Rules Engine enabled.
- Decisiontable—Decision table activation—Available in API version 62.0 and later.
- Education
- EmployeeService—Available in API version 63.0 and later.
- FinancialSummaryRollup—Available in API version 63.0 and later.
- ForeignExchangeGainLossCalculations
- FSCHierarchyRollUp
- Fundraising
- FundraisingRollups—Available in API version 63.0 and later.
- GeneralLedgerAccountBalancesSummary
- InventoryBatchSearch
- InventorySearch
- InvoiceGeneration—Available in API version 62.0 and later.
- LegalEntityAccountingPeriodClosureAdvanced—Available in API version 63.0 and later.
- LifeSciencesCommercialTerritoryAlignment—Available in API version 63.0 and later.
- LifeSciencesCustomerEngagement
- Loyalty
- LoyaltyPartnerManagement
- LoyaltyPointsAggregation
- NetZero

- NextGenForecasting—Available in API version 62.0 and later.
- PatientServicesProgram
- PnmRosterFileUpload—Available in API version 62.0 and later.
- PriceProtection—Available in API version 62.0 and later.
- ProductCatalogManagement—Available in API version 63.0 and later.
- ProgramBasedBusiness
- ProgramManagementRollups
- Rebates
- RecordAggregation
- RevenueTransactionManagement—Available in API version 63.0 and later.
- AccountingSubledger—This value is reserved for internal use.
- ProviderSearch—This value is reserved for internal use.
- Recruitment—Available in API version 62.0 and later.
- SalesAgreement—Available in API version 63.0 and later.
- StockRotation
- UsageManagement—Available in API version 62.0 and later.

When Data Processing Engine is enabled for a Salesforce org, the default value is 'Standard'. Other process types may be available to you depending on your industry solution and permission sets.

Data Processing Engine Metadata API

Use a Metadata API to create, update, and activate Data Processing Engine definitions.

BatchCalcJobDefinition

Represents a Data Processing Engine definition.

BatchCalcJobDefinition

Represents a Data Processing Engine definition.

Parent Type

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

File Suffix and Directory Location

BatchCalcJobDefinition components have the suffix .batchCalcJobDefinition and are stored in the batchCalcJobDefinitions folder.

EDITIONS

Available in: Lightning Experience

Available in: Data
Processing Engine is
available with Enterprise,
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Editions with the Financial
Services Cloud, Loyalty
Management,
Manufacturing Cloud,
Rebate Management,
Accounting Subledger, or
Provider Search in Health
Cloud.

Version

BatchCalcJobDefinition components are available in API version 51.0 and later.

Special Access Rules

To use this metadata type, one of these licenses is required:

- Loyalty Management
- Financial Services Cloud
- Rebate Management
- Manufacturing Cloud
- Net Zero Cloud

Field Name	Field Type	Description
aggregates	BatchCalcJob Aggregate[]	Collection of aggregate nodes in a data processing engine.
appends	BatchCalcJobUnion[]	Collection of append nodes in a data processing engine.
atomicWritebacks	BatchCalclbAtomicWiteBack[Collection of composite writeback nodes in a data processing engine definition. Available in API version 62.0 and later.
customNodes	BatchCalclobCustomNode[]	Collection of custom nodes in a data processing engine. Available in API version 57.0 and later.
dataSpaceApiName	string	Stores the Data Space API Name from . Available in API version 60.0 and later.
datasources	BatchCalcJob Datasource[]	Collection of data source nodes in a data processing engine.
definitionRunMode	BathCattlDRrModernmentn of type string)	Specifies the execution mode in a data processing engine. Valid values are:
		• Batch
		• OnDemand
description	string	Description of a data processing engine definition.
doesGenAllFailedRecords	boolean	Indicates whether the error file includes a complete list of all failed writeback records (true) or not (false). The default value is false, and only the first instance of a failure is recorded in the error file. If set to true, all failed records are recorded in the error file for the writeback node.
		Available in API version 65.0 and later.

Field Name	Field Type	Description
executionPlatformObjectType	Earth Earn Open permeeting of type string)	The execution platform object type that's used during the read, transform, and writeback process for the Data Processing Engine definition. Possible values are:
		• CalculatedInsightsObject
		• DataLakeObject
		• DataModelObject
		• None
		Available in API version 65.0 and later.
executionPlatformType	Becutor PattornType(erumeration of type string)	The platform that's used to run the Data Processing Engine definition. Valid values are:
		• CRMA
		• CDP
		• CORE
		Available in API version 59.0 and later.
filters	BatchCalcJobFilter[]	Collection of filter nodes in a data processing engine. definition.
forecasts	BatchCalcJobForecast[]	Collection of forecast nodes in a data processing engine. definition.
		Available in API version 58.0 and later.
hierarchyPaths	BatchCalclobHierarchyPath[]	Collection of hierarchy path nodes in a data processing engine definition.
isTemplate	boolean	Indicates whether it's a template data processing engine definition.
joins	BatchCalcJobSource Join[]	Collection of join nodes in a data processing engine.
label	string	The label of a data processing engine definition.
parameters	BatchCalcJobParameter[]	Collection of input variables in a data processing engine.
processType	BatchCalcProcessType (enumeration of type string)	The process type of a data processing engine. These process types may be available to you depending on your industry solution and permission sets. Valid values are:
		• AccountingPeriodClosure
		 AccountingSubledger—This value is reserved for internal use.
		• ActionableList
		• AdvancedAccountForecast
		• BenefitManagement
		• BillingSchedulesforInvoiceGeneration
		• CDPEnrichment
		 ChannelInventoryManagement—Available in API version 63.0 and later.

Field Name	Field Type	Description
		CollectionPlan—Available in API version 65.0 and later.
		• CriteriaBsdSearchAndFilter
		• DataProcessingEngine
		• DecisionMatrixDataUpload
		• Decisiontable
		• Education
		• EmployeeService—Available in API version 63.0 and later.
		• FinancialSummaryRollup
		• ForeignExchangeGainLossCalculations—Available in API version 65.0 and later.
		• FSCHierarchyRollUp
		 Fundraising—Available in API version 64.0 and later.
		• FundraisingRollups—Available in API version 63.0 and later.
		 GeneralLedgerAccountBalancesSummary—Available in API version 65.0 and later.
		• InventoryBatchSearch—Available in API version 65.0 and later.
		• InventorySearch—Available in API version 65.0 and later.
		• InvoiceGeneration
		• Loyalty
		• LegalEntityAccountingPeriodClosureAdvanced—Available in API version 63.0 and later.
		• LifeSciencbatchcalesCommercialTerritoryAlignment—Available in API version 63.0 and later.
		 LifeSciencesCustomerEngagement—Available in API version 64.0 and later.
		• LoyaltyPartnerManagement
		 LoyaltyPointsAggregation
		 NextGenForecasting—Available in API version 64.0 and earlier.
		• NetZero
		 PatientServicesProgram—Available in API version 64.0 and later.
		• PnmRosterFileUpload
		• PriceProtection
		• ProductCatalogManagement
		• ProgramBasedBusiness
		• ProviderSearch—This value is reserved for internal use.
		• Rebates
		• Recruitment

Field Name	Field Type	Description
		 RevenueTransactionManagement—Available in API version 63.0 and later.
		• SalesAgreement—Available in API version 63.0 and later.
		 TestAtomicWritebackScale—Available in API version 64.0 and later.
		• TestProcessType
		• UsageManagement
status	BatchJobDefinition Status (enumeration of type string)	Status of a data processing engine definition. Valid values are: Active Inactive
transforms	BatchCalcJobTransform[]	Collection of data transformation nodes in a data processing engine.
writebacks	BatchCalcJobWriteback Object[]	Collection of writeback objects in which the results of the data processing engine are written back.

BatchCalcJobAggregate

Represents a collection of fields relating to an aggregate node in a data processing engine.

Fields

Field Name	Field Type	Description
description	string	Description of an aggregate node.
fields	BatchCalcJob AggregateField[]	Required. Collection of aggregation fields.
groupBy	string[]	Required. Collections of fields used to group data in an aggregate node.
label	string	Required. Label of an aggregate node.
name	string	Required. Name of an aggregate node.
sourceName	string	Required. Name of the source node.

BatchCalcJobAggregateField

Represents a collection of fields relating to an aggregation field in an aggregate node of a data processing engine.

Fields

Field Name	Field Type	Description
aggregateFunction	Batch Calcob Aggregate Function (enumeration of type	Required. Function used for aggregation.
		Valid values are:
	string)	• Unique—A count of unique values.
		• Sum—The sum of all values.
		• Max—The largest value.
		• Min—The smallest value.
		• Avg—The average value, calculated as the mean.
		• Std—The standard deviation.
		• Stdp—A standard deviation with population variance.
		• Var—The variance.
		VarP—The variance with population.
		Count—The total count of values.
alias	string	Required. Name that subsequent nodes within the data processing engine use to refer to the aggregate field.
sourceFieldName	string	Required. Source node field on which the aggregate is calculated.

BatchCalcJobAtomicWriteback

Represents a node in a DPE definition that stores the details about the relationship between the writeback nodes and the composite writeback operations between the nodes.

Field Name	Field Type	Description
description	string	Description of the composite writeback object.
label	string	Required. Name of the composite writeback object.
name	string	Required. API name of the composite writeback object.
writebackObject Relationships	BathCatdbAtonitVMebadRettorshij]	Specifies the relationship between the writeback objects that are involved in the writeback operation.
writebackSequence	int	Sequence in which the data processing engine executes the composite write back node.

Batch Calc Job Atomic Write back Relationship

Represents the relationships between the writeback objects that are involved in a composite writeback operation. It captures the relationships between these objects and the sequence in which they should be processed.

Field Name	Field Type	Description
childWriteback ObjectField	string	Field name that's associated with the child writeback object in a composite writeback relationship. Available in API version 63.0 and later.
childWriteback ObjectName	string	Name of the child writeback object that's associated with the writeback relationship.
parentWriteback ObjectField	string	Field name that's associated with the parent writeback object in a composite writeback relationship. Available in API version 63.0 and later.
parentWriteback ObjectName	string	Required. Name of the parent writeback object that's associated with the writeback relationship.
relationshipName	string	Describes the relationship between the child and parent writeback objects in a composite writeback node. Available in API version 64.0 and later.
sequenceNumber	int	Sequence number of the writeback node that's associated with its parent node in the relationship.

BatchCalcJobCustomNode

Represents a collection of custom nodes in a data processing engine. Use a custom node to add a custom action.

Fields

Field Name	Field Type	Description
description	string	Description of a custom node.
extensionName	string	Required. Name of an extension node.
extensionNamespace	string	Required. Namespace of an extension node.
label	string	Required. Label of a custom node.
name	string	Required. Name of a custom node.
parameters	BatchCalcJob CustomNodeParameter[]	The field mappings of an extension node.
sources	string[]	Sources of an extension node.

BatchCalcJobCustomNodeParameter

Represents the field mappings of an extension node.

Field Name	Field Type	Description
name	string	Required. Name of a parameter.

Field Name	Field Type	Description
value	string	Required. Value of a parameter.

BatchCalcJobDatasource

Represents a collection of fields relating to a data source node in a data processing engine.

Field Name	Field Type	Description	
CSVDelimiter	BatchCalcJobCSVDelimiter (enumeration of type	Specifies the field separator to read fields from a CSV file record.	
		Possible values are:	
	string)	• COMMA	
		• BACKQUOTE	
		• CARET	
		• PIPE	
		• SEMICOLON	
		• TAB	
		The default value is COMMA.	
		The same delimiter value used for the CSV file can't be used within any of the column values in the file. If you mistakenly use the same delimiter value in column values, it can cause data parsing issues.	
description	string	Description of a data source node.	
fields	BatchCalcJob DatasourceField[]	Required. Collection of data source fields.	
fileIdentifier	string	Specifies the source of the file or file storage system.	
filePath	string	The file path for the specified file.	
fileSource BatchCalcJobFileSource		Specifies the source of the file or file storage system.	
	(enumeration of type	Possible value is:	
	string)	• ContentManagement	
label	string	Required. Label of a data source node.	
name	string	Required. Name of a data source node.	
sourceName	string	Required. Name of a standard or custom object from which the data source node extracts data.	
type	BatchCalcJobDataSource Type (enumeration of type string)	Required. Type of object for the source object field. Supported values are: • Analytics • CalculatedInsightsObject	

Field Name	Field Type	Description	
		• CRMObject	
		• CSV	
		• DataModelObject	
		• StandardObject	

BatchCalcJobDatasourceField

Represents a collection of fields relating to a source object field that are selected in the data source node of a data processing engine.

Fields

Field Name	Field Type	Description
alias	string	Name that subsequent nodes within the data processing engine use to refer to the data source field. Required when the field name is lookup.
dataType	BatchCalcJobDataType (enumeration of type string)	Specifies the data type of the input field when using a CSV file as a data source. Possible values are: Boolean—Available in API version 65.0 and later. Date DateTime MultiValue Numeric Text
isPrimaryKey	boolean	Indicates whether a column name is the primary key (true) or not (false) for the Data Cloud CSV file.
name	string	 Required. Name of the field. Can be either of the following: Name of the source field selected in the associated data source object. Name from a nested lookup object with three child levels.

BatchCalcJobFilter

Represents a collection of fields relating to a filter node in a data processing engine.

Fields

Field Name	Field Type	Description
criteria	BatchCalcJobFilter Criteria[]	Collection of filter criteria in a filter node.
		The field is required when isDynamicFilter is set to False.
description	string	Description of the batch calculation job filter.
filterCondition	string	Logic that is specified to apply the filter conditions.
		The field is required when isDynamicFilter is set to False.
filterParameterName	string	Name of the parameter of type filter.
isDynamicFilter	boolean	Indicates whether the filter criteria is dynamic. If value is set to True, filter criteria is passed in runtime with filterParameterName.
label	string	Required. Label of the filter node.
name	string	Required. Name of the filter node.
sourceName	string	Required. Name of the source node.

BatchCalcJobForecast

Represents a collection of fields relating to a forecast node in a data processing engine. Available in API version 58.0 and later.

Field Name	Field Type	Description
acıayeret	BatchCalcJobFrcstAccuracy (enumeration of type string)	The interval percentage to account for errors in forecasts.
		Possible values are:
		• Eighty
		NinetyFive
		• None
		The default value is None.
aggagtin Fels	BtchCalcJobFrcstAggrFld[]	The list of fields to forecast.
dateFeldName	string	Required.
		The date field from the source node used to forecast values for the specified forecast length.

Field Name	Field Type	Description
description	string	The description of the forecast node.
foestvollye	BatchCalcJobFrcstModel (enumeration of type string)	The model used to forecast data.
		Possible values are:
		• Additive
		• Auto
		• Multiplicative
		The default value is Auto.
foersteriothol.	int	The number of time periods to generate forecast data. For example, if you select Year-Month as the forecast period type, and 4 as the forecast period count, the forecast results are generated for the next 4 months. The minimum and the
		default count is 1, and the maximum is 100.
hesièndie	BatchCalcJobFrcstPeriodType (enumeration of type string)	Required. The type of forecast period to group date field values in the forecast results. Possible values are: FiscalYear FiscalYearMonth FiscalYearWeek Year YearMonth YearMonthDay
grapFields	BatchCalcJobFrcstGrpFld[]	YearQuarterYearWeekThe source fields for

	Description
	processed by the forecast node.
string	Required.
	The name of the forecast node in the UI.
string	Required.
	A unique name for the forecast node.
string	Required.
	The start date of the forecast period.
BatchCalcJobFrcstSeasonality (enumeration of type string)	Represents the periodic fluctuations that occur around the same time every year. Possible values are: Two Three Four Five Six Seven Eight Nine Ten Eleven Twelve Thirteen Fourteen Fifteen Sixteen Seventeen Eighteen Nineteen Twenty TwentyOne
	string

Field Field Type Name	Description
	• TwentyTwo
	TwentyThree
	TwentyFour
	• Auto
	• None
	The default value is None.
softchestates boolean	Indicates whether to ignore the last period in the source node when it has incomplete data (true) or not (false).
	The default value is false.
sourceName string	Required.
	The name of the source node.
	A source can be any node other than the datasink and register node.

Btch Calc Job Frcst Aggr Fld

Represents a list of fields to forecast in a forecast node.

Field Name	Field Type	Description
aggregateFunction	BatchCalcJobAggregateFunction	Required.
	(enumeration of type string)	The function of the aggregate field.
		Possible values are:
		• Avg
		• Count
		• Max
		• Min
		• Std
		• StdP
		• Sum
		• Unique
		• Var

Field Name	Field Type	Description
		• VarP
aggregationResultLabel	string	Required.
		The name of the aggregation result generated from the aggregation function that's applied to the source node field.
fieldName	string	Required. The name of the source field.

Batch Calc Job Frcst Grp Fld

Represents source fields for grouping the data to be processed by the forecast node.

Field Name	Field Type	Description
fieldName	string	Required.
		The name of the source field to group the data to be processed by the forecast node.
groupBy	string	A comma-separated list of values to group data by.
		Required when the source field type is Date or DateTime.
		Possible values are:
		• Second
		• Second Epoch
		• Minute
		• Hour
		• Day
		Day Epoch
		• Week
		•
		• Month
		• Quarter
		• Year

${\bf Batch Calc Job Hierarchy Path}$

Represents a collection of hierarchy path nodes in a data processing engine definition.

Fields

Field Type	Description
string	Description of the hierarchy path node.
string	Required. Field name that contains the hierarchy path.
boolean	Indicates whether the self value is included in the calculated hierarchy path (True) or not (False).
string	Required. Label of the hierarchy path node.
string	Required. Name of the hierarchy path node.
string	Required. Parent field name to calculate hierarchy path.
string	Required. Self field name to calculate hierarchy path.
string	Required. Name of the source node.
	string string boolean string string string string string

BatchCalcJobFilterCriteria

Represents a collection of fields relating to a filter condition in a filter node in a data processing engine.

Field Name	Field Type	Description
inputVariable	string	Name of the input variable used as a filter.
operator	string BatchCalcJobFilter Operator (enumeration of type string)	Name of the input variable used as a filter. Required. Operator that is specified in the filter condition. Valid values are: Equals NotEquals GreaterThan GreaterThan LessThan LessThan LessThanOrEqual StartsWith EndsWith Contains DoesNotContain IsNull IsNotNull
		 LessThan LessThanOrEqual StartsWith EndsWith Contains DoesNotContain IsNull IsNotNull

Field Name	Field Type	Description
sequence	integer	Required. Sequence number used to refer the criteria in a filter node.
sourceFieldName	string	Required. Name of the field from the source node to apply the filter.
value	string	Value used to filter data from the source node.

BatchCalcJobParameter

Represents a collection of fields relating to an input variable in a data processing engine.

Fields

Field Name	Field Type	Description
dataType	BatchCalcJobParameter DataType (enumeration of type string)	Required. Data type of the parameter. Valid values are: Date DateTime Expression FileIdentifier Filter Numeric Text
defaultValue	string	Default value of the parameter.
description	string	Description of the batch calculation job parameter.
isMultiValue	boolean	Indicates whether the parameter has different values (True) or not (False). This field is supported only for the Text data type.
label	string	Required. Label of the batch calculation job parameter.
name	string	Required. Name of the batch calculation job parameter.

BatchCalcJobSourceJoin

Represents a collection of fields relating to a join node in a data processing engine.

Field Name	Field Type	Description
description	string	Description of the join node.
fields	BatchCalcJobJoin ResultField[]	Collection of fields in a join node.

Field Name	Field Type	Description
joinKeys	BatchCalcJobJoin Key[]	Collection of mapping of fields from the primary source node and the second source node in a join node.
label	string	Required. Label of the join node.
name	string	Required. Name of the join node.
primarySourceName	string	Required. Name associated with the node as the primary source node.
secondarySourceName	string	Required. Name associated with the node as the secondary source node.
type	BatchCalcJobSource JoinType (enumeration of type string)	Required. Type of join specified between the primary source node and secondary source node. Valid values are: • LeftOuter • RightOuter • Inner • Outer • Lookup

BatchCalcJobJoinKey

Represents a collection of fields relating to a mapping of fields from the first source node and second source node in a join node of a data processing engine.

Fields

Field Name	Field Type	Description
primarySourceFieldName	string	Required. Mapped field name of the primary source node.
secondarySourceFieldName	string	Required. Mapped field name of the secondary source node.

BatchCalcJobJoinResultField

Represents a collection of fields relating to a set of resultant fields in a join node of a data processing engine.

Field Name	Field Type	Description
alias	string	Required. Name that subsequent nodes within the data processing engine definition use to refer to the resultant field.
sourceFieldName	string	Required. Name of field from the primary or secondary data source.
sourceName	string	Required. Source node of the primary or secondary data source.

BatchCalcJobTransform

Represents a collection of fields relating to a data transformation in a data processing engine.

Fields

Field Name	Field Type	Description
description	string	The description of the batch calculation job transform.
droppedFields	BatchCalcJobTransform DroppedField[]	The collection of dropped fields in a data transformation. Available when the transformation type is Slice.
expressionFields	BatchCalcJobTransform AddedField[]	The collection of formula fields in a data transformation. Available when the transformation type is Expression.
label	string	Required. The label of the batch calculation job transform.
name	string	Required. The name of the batch calculation job transform.
orderBy	BatchCalcJobOrderByField on page 284[]	A collection of fields that's used to sort the records within each partition group.
partitionBy	string[]	A group of fields that's used to partition the source data into partition groups.
sourceName	string	Required. Name of the source node.
transformType	BatchCalcJobTransform	Required. The type of transformation.
	Type (enumeration of type string)	Valid values are:
	type sumg/	• ComputeRelative—This transformation calculates values based o values of the same partition group.
		• Expression—This transformation calculates values based on existing values of fields in the same record.
		• Slice—This transformation removes fields from the source node.

Batch Calc Job Transform Dropped Field

Represents a collection of fields relating to a dropped field in a data transformation of a data processing engine.

Fields

Field Name	Field Type	Description
sourceFieldName	string	Required. Name of the field that is dropped.

BatchCalcJobTransformAddedField

Represents a collection of fields relating to a formula in a data transformation of a data processing engine.

Fields

Field Name	Field Type	Description
alias	string	Required. Name that subsequent nodes within the data processing engine use to the transform node.
dataType	BatchCalcJobDataType (enumeration of type string)	Required. Data type of the formula. Valid values are: Boolean—Available in API version 65.0 and later. Date DateTime MultiValue Numeric Text
decimalPlaces	integer	Number of digits to the right of a decimal point in the value. Required for the Numeric data type.
expression	string	Required. Formula defined by the user.
length	integer	Total length of the value including the decimal places. Required for data types: Text and Numeric.

BatchCalcJobOrderByField

Represents a collection of fields that are used to sort the partitioned data.

Fields

Field Name	Field Type	Description
name	string	Required. Name of the field that is used to sort data.
orderType	, , , , , , , , , , , , , , , , , , ,	Order in which the data is sorted.
	of type string)	Valid values are:
		 Ascending
		 Descending

BatchCalcJobUnion

Represents a collection of fields relating to the union of data from two nodes in a data processing engine.

Fields

Field Name	Field Type	Description
description	string	Description of the batch calculation job union.
isDisjointedSchema	boolean	Indicates whether the union is of two disjointed datasets (true) or not (false). Set to True to allow joining of two datasets having no common fields.
label	string	Required. Label of the batch calculation job union.
name	string	Required. Name of the batch calculation job union.
sources	string[]	Names of the source nodes.

${\bf Batch Calc Job Write back Object}$

Represents a collection of fields relating to the object in which the results of the data processing engine are written back.

Field Name	Field Type	Description
canWirtbckTdVonEditableFields	boolean	Indicates whether the non-editable fields are included in field mapping when the action type is upsert. The default value is false.
		Available in API version 64.0 and later.
description	string	Descriptions of the batch calculation job writeback object.
externalIdFieldName	string	Unique external field ID for the target object name.
		Available in API version 60.0 and later.
fields	BatchCalcJobWriteback Mapping[]	Collection of the writeback fields.
filterCondition	string	The condition that filters the records from a writeback dataset for a user. Examples of a filter condition include a user ID, stage name, and a security policy that returns only the records that a user owns.
		Available in API version 57.0 and later.
folderName	string	The folder where the writeback dataset is saved. Available in API version 57.0 and later.
isChangedRow	boolean	Indicates whether a row in the write back object is changed. Set to True to write back the changed rows.
isExistingDataset	boolean	Indicates whether a CRM Application (CRMA) dataset or a Data Lake object is present (true) or will be created (false). Available in API version 62.0 and later.
label	string	Required. Name of the write back object.

Field Name	Field Type	Description
name	string	Required. Name of the batch calculation job write back object.
operationType	BatchCalcJobWriteback Opn (enumeration of type string)	Type of operation specified. Valid values are: Delete—This value is available in API version 56.0 and later. Insert Overwrite—Available only when storageType is DataLakeObject. This value is available in API version 60.0 and later. Update Upsert
sharingInheritanceObjectName	string	The name of the source object from which the row-level sharing inheritance settings are applied. Available in API version 57.0 and later.
shouldCreateTargetObject	boolean	Indicates whether target Data Lake Object or Salesforce Object is created in Salesforce (true) or not (false). Available in API version 65.0 and later.
sourceName	string	Required. Name of the source node associated with the write back object.
storageType		Specifies where you want to use the data stored in the source node. Available in API version 57.0 and later. Valid values are: • Analytics • DataLakeObject • sObject The default value is sObject.
targetObjectName	string	Required. Object that is inserted or upserted by the data processing engine.
writebackSequence	integer	Sequence in which the target object is updated by the data processing engine.
writebackUser	string	ID of the user whose permissions decide which objects and fields of the target object can be updated.

BatchCalcJobWritebackMapping

Represents a collection of fields relating to the mapping between results and the fields in the target object.

Field Name	Field Type	Description
fieldType	string	Target field type on the writeback object. Valid values are: • Primary Key
		Qualifier Key

Field Name	Field Type	Description
		Available in API version 64.0 and later.
isAutogenerated	boolean	Indicates whether the target field value on the writeback object is autogenerated (true) or not (false). Available in API version 64.0 and later.
parentName	string	Name of the lookup object. Required only when the relationshipName field is defined.
relationshipName	string	Name of the lookup relationship.
runtimeParameter	boolean	Indicates whether the source field from runtime parameter is true or false. The default value is false. Available in API version 59.0 and later.
sourceFieldName	string	Required. Name of the field in the source node that is written back.
targetFieldName	string	Name of the sObject field to which the results are written back.

Declarative Metadata Sample Definition

The following is an example of a BatchCalcJobDefinition component.

```
<?xml version="1.0" encoding="UTF-8"?>
<BatchCalcJobDefinition xmlns="http://soap.sforce.com/2006/04/metadata">
    <aggregates>
       <description>Aggregate Description</description>
       <fields>
            <aggregateFunction>Count</aggregateFunction>
            <alias>NameCount</alias>
            <sourceFieldName>Name/sourceFieldName>
       </fields>
       <groupBy>ContactId</groupBy>
       <groupBy>Name</groupBy>
       <label>AggregateOpportunities</label>
        <name>AggregateOpportunities
       <sourceName>Opportunity</sourceName>
    </aggregates>
    <forecasts>
       <description>ForecastNode Description</description>
       <label>ContactForecast</label>
       <name>ContactForecast</name>
       <sourceName>Contact</sourceName>
       <dateFieldName>CreatedDate</dateFieldName>
       <forecastPeriodType>YearMonth</forecastPeriodType>
       <shouldExcludeLastPeriod>false</shouldExcludeLastPeriod>
       <forecastPeriodCount>12</forecastPeriodCount>
       <periodStartDateName>CreatedDateYM</periodStartDateName>
       <forecastModelType>Auto</forecastModelType>
        <seasonality>None</seasonality>
        <accuracyPercent>None</accuracyPercent>
```

```
<aggregationFields>
        <aggregateFunction>Count</aggregateFunction>
        <aggregationResultLabel>CountOfLastName</aggregationResultLabel>
        <fieldName>LastName</fieldName>
    </aggregationFields>
    <groupFields>
        <fieldName>LastModifiedDate</fieldName>
        <groupBy>Week</groupBy>
    </groupFields>
</forecasts>
<appends>
    <description>Append desc</description>
    <isDisjointedSchema>true</isDisjointedSchema>
    <label>AppendAllAccounts
   <name>AppendAllAccounts
   <sources>AccountsOfManufacturingIndustry
    <sources>ComputeRelativeManufacturingIndustry</sources>
</appends>
<datasources>
    <description>Desc Contact</description>
    <fields>
       <alias>Id</alias>
        <name>Id</name>
       <isPrimaryKey>false</isPrimaryKey>
        <dataType>Text</dataType>
    </fields>
    <fields>
        <alias>LastName</alias>
       <name>LastName</name>
       <isPrimaryKey>false</isPrimaryKey>
       <dataType>Text</dataType>
    </fields>
    <fields>
       <alias>CreatedDate</alias>
       <name>CreatedDate</name>
        <isPrimaryKey>false</isPrimaryKey>
        <dataType>Date</dataType>
    </fields>
    <fields>
        <alias>LastModifiedDate</alias>
        <name>LastModifiedDate</name>
       <isPrimaryKey>false</isPrimaryKey>
        <dataType>Date</dataType>
    </fields>
    <label>Contact</label>
    <name>Contact</name>
   <sourceName>Contact</sourceName>
   <type>StandardObject</type>
   <fileSource>ContentManagement</fileSource>
    <fileIdentifier>069xx0000004CAeAAM</fileIdentifier>
    <CSVDelimiter>COMMA</CSVDelimiter>
    <filePath>parentFolder/childFolder</filePath>
</datasources>
<datasources>
```

```
<fields>
            <alias>Name</alias>
            <name>Name</name>
            <isPrimaryKey>false</isPrimaryKey>
            <dataType>Text</dataType>
        </fields>
        <fields>
            <alias>ContactId</alias>
            <name>ContactId</name>
            <isPrimaryKey>false</isPrimaryKey>
            <dataType>Text</dataType>
        </fields>
        <label>Opportunity</label>
        <name>Opportunity</name>
        <sourceName>Opportunity</sourceName>
        <type>StandardObject</type>
        <fileSource>ContentManagement</fileSource>
        <fileIdentifier>069xx0000004CAeAAM</fileIdentifier>
        <CSVDelimiter>COMMA</CSVDelimiter>
        <filePath>parentFolder/childFolder</filePath>
    </datasources>
    <description>Calculates and creates transaction journal records based on the orders
placed by the loyalty program members. The transaction journals are used to accrue points
to the member.</description>
   <filters>
        <criteria>
            <operator>Equals</operator>
            <sequence>1</sequence>
            <sourceFieldName>LastName</sourceFieldName>
            <value>Salesforce</value>
        </criteria>
        <description>Filter Desc</description>
        <filterCondition>1</filterCondition>
        <isDynamicFilter>false</isDynamicFilter>
        <label>AccountsOfManufacturingIndustry</label>
        <name>AccountsOfManufacturingIndustry
        <sourceName>AccountOpportunities</sourceName>
    </filters>
    <hierarchyPaths>
        <description>Hierarchy Path Node</description>
        <hierarchyFieldName>Hierarchy Path/hierarchyFieldName>
        <isSelfFieldValueIncluded>true</isSelfFieldValueIncluded>
        <label>Get Hierarchy</label>
        <name>Get Hierarchy</name>
        <parentFieldName>ContactId</parentFieldName>
        <selfFieldName>LastName</selfFieldName>
        <sourceName>AppendAllAccounts</sourceName>
    </hierarchyPaths>
    <isTemplate>false</isTemplate>
    <joins>
        <description>Left Outer Join</description>
        <fields>
            <alias>ContactId</alias>
            <sourceFieldName>Id</sourceFieldName>
```

```
<sourceName>Contact</sourceName>
       </fields>
       <fields>
          <alias>LastName</alias>
          <sourceFieldName>LastName</sourceFieldName>
          <sourceName>Contact</sourceName>
       <fields>
          <alias>NameCount</alias>
          <sourceFieldName>NameCount</sourceFieldName>
          <sourceName>AggregateOpportunities</sourceName>
       </fields>
       <fields>
          <alias>OpportunityName</alias>
          <sourceFieldName>Name/sourceFieldName>
          <sourceName>AggregateOpportunities</sourceName>
       </fields>
       <joinKeys>
          primarySourceFieldName>Id/primarySourceFieldName>
          <secondarySourceFieldName>ContactId</secondarySourceFieldName>
       </joinKeys>
       <label>AccountOpportunities</label>
       <name>AccountOpportunities
       cprimarySourceName>Contact/primarySourceName>
       <secondarySourceName>AggregateOpportunities</secondarySourceName>
       <type>LeftOuter</type>
   </joins>
   <label>Create Transaction Journals Based on Orders</label>
   <parameters>
       <dataType>Date</dataType>
       <defaultValue>2020-01-01</defaultValue>
       <description>Desc TextParameter</description>
       <isMultiValue>false</isMultiValue>
       <label>DateParameter</label>
       <name>DateParameter
   </parameters>
   <parameters>
       <dataType>Filter</dataType>
       <defaultValue>{&quot;filterCondition&quot;: &quot;1 AND 2&quot;,
"criteria": [{"sourceFieldName":
"NameCount", "operator": "GreaterThan", "value":
"20","sequence": "1"}, {"sourceFieldName":
" Name ", " operator ": " Equals ", " value ":
"Salesforce","sequence": "2"}]}</defaultValue>
       <isMultiValue>false</isMultiValue>
       <label>FilterParameter
       <name>FilterParameter
   </parameters>
   <parameters>
       <dataType>Numeric</dataType>
       <defaultValue>5000</defaultValue>
       <description>Desc TextParameter</description>
       <isMultiValue>false</isMultiValue>
       <label>NumericParameter</label>
```

```
<name>NumericParameter
</parameters>
<parameters>
   <dataType>Text</dataType>
   <defaultValue>@salesforce.com</defaultValue>
   <description>Desc TextParameter</description>
   <isMultiValue>false</isMultiValue>
   <label>TextParameter</label>
   <name>TextParameter</name>
</parameters>
<definitionRunMode>Batch</definitionRunMode>
<status>Inactive</status>
<transforms>
   <description>transforms Desc</description>
   <expressionFields>
       <alias>NewLastName</alias>
       <dataType>Text</dataType>
       <expression>TODAY()</expression>
       <length>80</length>
   </expressionFields>
   <label>ManufacturingIndustry</label>
   <name>ManufacturingIndustry
   <sourceName>AccountsOfManufacturingIndustry</sourceName>
   <transformationType>Expression</transformationType>
</transforms>
<transforms>
   <droppedFields>
       <sourceFieldName>NewLastName/sourceFieldName>
   </droppedFields>
   <label>MediaIndustry</label>
   <name>MediaIndustry
   <sourceName>ManufacturingIndustry</sourceName>
   <transformationType>Slice</transformationType>
</transforms>
<transforms>
   <description>compute relative transforms Desc</description>
   <expressionFields>
       <alias>NewLastName</alias>
       <dataType>Text</dataType>
       <expression>rank()</expression>
       <length>80</length>
   </expressionFields>
   <label>ComputeRelativeManufacturingIndustry</label>
   <name>ComputeRelativeManufacturingIndustry
       <name>LastName</name>
       <orderType>Ascending</orderType>
   </orderBy>
   <partitionBy>LastName</partitionBy>
   <sourceName>MediaIndustry</sourceName>
   <transformationType>ComputeRelative</transformationType>
</transforms>
<customNodes>
```

```
<name>RebatesCustomNode
       <label>Rebates Custom Node</label>
       <description>customNodes Desc</description>
       <sources>Get Hierarchy</sources>
       <extensionName>RebatesExpression/extensionName>
       <extensionNamespace>industries mfg</extensionNamespace>
       <parameters>
           <name>inputColumn</name>
            <value>LastName</value>
       </parameters>
       <parameters>
           <name>isFilterCriteria
           <value>true</value>
       </parameters>
       <parameters>
           <name>outputColumn</name>
           <value>GenName</value>
       </parameters>
   </customNodes>
    <writebacks>
       <fields>
           <sourceFieldName>GenName/sourceFieldName>
           <targetFieldName>LastName</targetFieldName>
       </fields>
       <isChangedRow>false</isChangedRow>
       <label>exportToContact</label>
       <name>exportToContact</name>
       <description>Export To Contact</description>
       <operationType>Insert</operationType>
       <sourceName>RebatesCustomNode</sourceName>
       <targetObjectName>Contact</targetObjectName>
       <writebackSequence>1</writebackSequence>
   </writebacks>
    <writebacks>
       <fields>
           <sourceFieldName>CreatedDateYM</sourceFieldName>
            <targetFieldName>CreatedDate</targetFieldName>
       </fields>
       <isChangedRow>false</isChangedRow>
       <isExistingDataset>false</isExistingDataset>
       <label>exportToContactFC</label>
       <name>exportToContactFC</name>
       <description>Export To Contact</description>
       <operationType>Insert
       <sourceName>ContactForecast</sourceName>
       <targetObjectName>Contact</targetObjectName>
       <writebackSequence>2</writebackSequence>
    </writebacks>
</BatchCalcJobDefinition>
```

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

Wildcard Support in the Manifest File

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

Data Processing Engine Invocable Actions

Run an active Data Processing Engine definition. For more information on custom invocable actions, see **REST API Developer Guide** and **Actions Developer Guide**.

Data Processing Engine Actions

Run an active Data Processing Engine definition. This action executes a Data Processing Engine definition asynchronously.

Data Processing Engine Actions

Run an active Data Processing Engine definition. This action executes a Data Processing Engine definition asynchronously.

A Data Processing Engine definition transforms data from your Salesforce org and writes back the results to your org. For more information about running Data Processing Engine definitions, see Run a Data Processing Engine Definition in Salesforce Help.

This object is available in API version 51.0 and later.

Supported REST HTTP Methods

URI

/services/data/vXX.X/actions/custom/dataProcessingEngineAction

Formats

JSON

HTTP Methods

GET, POST

Authentication

Authorization: Bearer token

Inputs

Use the GET method to retrieve input variables of a Data Processing Engine definition. The input variables of each Data Processing Engine definition are unique. The Data Processing Engine action uses the input variables to execute the Data Processing Engine definition and generate a batch job ID.



Note: You can't use this action to start two simultaneous runs of a definition with the same input variables.

Outputs

Output	Details
batchJobId	Type string
	Description ID of the batch job generated after the request is successful. This ID is used to track the progress of the batch job in Monitor Workflow Services.

Usage

JSON Sample Request to execute PointsAccrual DPE Definition

```
"PointsAccrual" : {
    "memberTier" : "Gold",
    "minimumPointBalanceRequired" : "50000",
    "pointType" : "non-qualifying"
}
```

JSON Sample Response

```
"actionName":"PointsAccrual",
    "errors":null,
    "isSuccess":true,
    "outputValues":{
        "batchJobId":"01Mxx0000A000001EAA"
    }
}
```

Example

GET

This example shows how to retrieve input variables of a Data Processing Engine action type.

```
curl --include --request GET \
   --header "Authorization: Authorization: Bearer 00DR...xyz" \
   --header "Content-Type: application/json" \
   "https://instance.salesforce.com/services/data/v60.0/actions/custom/dataProcessingEngineAction/newinputvardefn"
```

POST

Here's a request to retrieve DPE definition

```
{
  "inputs": [
```

```
{
    "start_date": "26-09-2023",
    "end_date": "12-12-2023",
    "randomkey": "069SM0000001SgbYAE"
}
]
```

Here's a response for this action.

```
[
    "actionName": "newinputvardefn",
    "errors": null,
    "invocationID": null,
    "isSuccess": true,
    "outputValues": {
        "batchJobId": "OmdSM0000006EJdYAM",
        "accepted": true
    },
    "version": 1
}
```

Batch Management

Automate the processing of records in scheduled flows. You can process a high volume of standard and custom object records. Batch Management consists of three Tooling API objects, a standard object, a Metadata API, and an invocable action. You can use these resources to view, create, edit, and run Batch Management jobs.

Batch Management Tooling API Objects

You can use the Batch Management Tooling API object to view the settings of Batch Management jobs.

Batch Management Standard Objects

Batch Management contains a standard BatchProcessJobDefinitionView object, which you can use to view all the batch jobs available in your Salesforce org, including file-based jobs.

Batch Management Metadata API

Use a Metadata API to create, update, and activate Batch Management jobs.

Batch Management Invocable Actions

Run an active Batch Management job definition. For more information on custom invocable actions, see **REST API Developer Guide** and **Actions Developer Guide**.

EDITIONS

Available in: Lightning Experience

Available in: Batch
Management is available
with Enterprise, Unlimited,
and Performance Editions
with the Loyalty
Management,
Manufacturing Cloud,
Rebate Management, or
Accounting Subledger

Batch Management Tooling API Objects

You can use the Batch Management Tooling API object to view the settings of Batch Management jobs.

Tooling API objects let you interact with metadata for declarative development. For example, you can create your own version of Setup.

BatchProcessJobDefinition

Represents the details of a Batch Management job. This object is available in API version 51.0 and later.

BatchProcessJobDefinition

Represents the details of a Batch Management job. This object is available in API version 51.0 and later.



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

Data and processes in your org are impacted if you update or delete a BatchProcessJobDefinition record. Update or delete a Batch Management job using the Metadata API on page 304.

Supported SOAP API Calls

describeSObjects(), query(), retrieve()

Supported REST API Methods

DELETE, GET, HEAD, PATCH, POST, Query

Fields

Field	Details
BatchJobDefinitionId	Type reference
	Properties Filter, Group, Nillable, Sort
	Description The unique identifier of the associated batch job definition.
	This is a relationship field.
	Relationship Name BatchJobDefinition
	Relationship Type Lookup
	Refers To BatchJobDefinition

EDITIONS

Available in: Lightning Experience

Available in: Batch Management is available with Enterprise, Unlimited, and Performance Editions with the Loyalty Management, Manufacturing Cloud, Rebate Management, or Accounting Subledger

Field	Details
BatchJobDefinitionName	Туре
	string
	Properties
	Filter, Group, Nillable, Sort
	Description
	The name of the associated batch job definition.
BatchSize	Туре
	int
	Properties
	Filter, Group, Sort
	Description
	Required. The number of records that each Batch Management job part can process. The
	maximum number of transaction journal records that a batch management job can process
	for flow or loyalty program process is 2000.
Description	Туре
	textarea
	Properties
	Filter, Group, Nillable, Sort
	Description
	The description of the Batch Management job.
DeveloperName	Туре
	string
	Properties
	Filter, Group, Sort
	Description
	The developer name of the Batch Management job.
	e act clope. Hame of the batter management job.
FlowDefinitionId	Туре
	reference
	Properties
	Filter, Group, Nillable, Sort
	Description
	The input variable of the associated flow that uniquely identifies each record that the Batch
	Management job processes.
FullName	Туре
	string
	Properties
	Create, Group, Nillable

Field	Details		
	Description The name of the Batch Management job.		
	Query this field only if the query result contains no more than one record. Otherwise, an erro is returned. If more than one record exists, use multiple queries to retrieve the records. This limit protects performance.		
Language	Type picklist		
	Properties Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort		
	Description The language in which the batch job is created.		
	Possible values are:		
	• da—Danish		
	• de—German		
	en_US—English		
	• es—Spanish		
	• es_MX—Spanish (Mexico)		
	• fi—Finnish		
	• fr—French		
	• it—Italian		
	• ja—Japanese		
	• ko—Korean		
	• nl_NL—Dutch		
	• no—Norwegian		
	pt_BR—Portuguese (Brazil)		
	• ru—Russian		
	• sv—Swedish		
	• th—Thai		
	• zh_CN—Chinese (Simplified)		
	• zh_TW—Chinese (Traditional)		
ManageableState	Type ManageableState enumerated list		
	Properties Filter, Group, Nillable, Restricted picklist, Sort		
	Description Indicates the manageable state of the specified component that is contained in a package		

• beta

Field	Details				
	• deleted				
	• deprecated				
	• deprecatedEditable				
	• installed				
	• installedEditable				
	• released				
	• unmanaged				
MasterLabel	Туре				
	string				
	Properties Filter, Group, Sort				
	Description The label of the Batch Management job.				
Metadata	Type complexvalue				
	Properties Create, Nillable, Update				
	Description The Batch Management job's metadata.				
	Query this field only if the query result contains no more than one record. Otherwise, an error is returned. If more than one record exists, use multiple queries to retrieve the records. This limit protects performance.				
NamespacePrefix	Type string				
	Properties				
	Filter, Group, Nillable, Sort				
	Description The namespace prefix that is associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix. Limit: 15 characters. You can refer to a component in a managed package by using the namespacePrefix_componentName notation.				
	The namespace prefix can have one of the following values.				
	 In Developer Edition orgs, NamespacePrefix is set to the namespace prefix of the org for all objects that support it, unless an object is in an installed managed package. In that case, the object has the namespace prefix of the installed managed package. This field's value is the namespace prefix of the Developer Edition org of the package developer. 				

Field	Details		
	 In orgs that are not Developer Edition orgs, NamespacePrefix is set only for objects that are part of an installed managed package. All other objects have no namespace prefix. 		
ProcessGroup	Type string		
	Properties Filter, Group, Nillable, Sort		
	Description The group or team for which the Batch Management job processes records.		
RecordIdVariable	Type string		
	Properties Filter, Group, Nillable, Sort		
	Description The unique identifier that identifies each record that must be processed by the Batch Management job.		
RetryCount	Type int		
	Properties Defaulted on create, Filter, Group, Sort		
	Description Required. The number of times this Batch Management job must be rerun in case it fails.		
RetryInterval	Type int		
	Properties Defaulted on create, Filter, Group, Sort		
	Description Required. The number of milliseconds after which the Batch Management job must be rerun in case it fails. A retry interval can be 1,000–10,000 milliseconds.		
Status	Type picklist		
	Properties Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort		
	Description The status of the Batch Management job.		
	Possible values are:		

Field	Details			
	• Inactive			
Туре	Туре			
	picklist			
	Properties			
	Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort			
	Description The type of process for which the Batch Management job processes records.			
	Possible values are:			
	• DecisionTableRefresh			
	• Flow			
	• LoyaltyProgramProcess			
	The default value is Flow.			
	This field is available in API version 55.0 and later.			
TypeInstance	Туре			
	string			
	Properties			
	Filter, Group, Sort			
	Description			
	Required. The API name of the process that the Batch Management job must execute.			

Batch Management Standard Objects

Batch Management contains a standard BatchProcessJobDefinitionView object, which you can use to view all the batch jobs available in your Salesforce org, including file-based jobs.

BatchProcessJobDefView

Represents the details of a Batch Job definition. The definition can also be file-based definitions that are available in your Salesforce org. This object is available in API version 51.0 and later.

BatchProcessJobDefView

Represents the details of a Batch Job definition. The definition can also be file-based definitions that are available in your Salesforce org. This object is available in API version 51.0 and later.

Supported Calls

describeSObjects(), query()

EDITIONS

Available in: Lightning Experience

Available in: Batch
Management is available
with Enterprise, Unlimited,
and Performance Editions
with the Loyalty
Management,
Manufacturing Cloud,
Rebate Management, or
Accounting Subledger

Field	Details
DurableId	Туре
	string
	Properties
	Filter, Group, Nillable, Sort
	Description The unique identifier for the field. Always retrieve this value before using it, as the value isn't guaranteed to stay the same from one release to the next. Simplify queries by using this field instead of making multiple queries.
IsActive	Туре
	boolean
	Properties
	Defaulted on create, Filter, Group, Sort
	Description
	Indicates whether the definition is active.
Label	Туре
	string
	Properties
	Filter, Group, Nillable, Sort
	Description
	The label of the Batch Job definition.
Name	Туре
	string
	Properties
	Filter, Group, Nillable, Sort
	Description
	The name of the Batch Job definition.
NamespacePrefix	Туре
	string
	Properties
	Filter, Group, Nillable, Sort
	Description
	The namespace prefix associated with this object. Each Developer Edition organization that
	creates a managed package has a unique namespace prefix. Limit: 15 characters. You can
	refer to a component in a managed package by using the namespacePrefix_componentName notation.
	The namespace prefix can have one of the following values:

Field	Details		
	 In Developer Edition organizations, the namespace prefix is set to the namespace prefix of the organization for all objects that support it. There is an exception if an object is in an installed managed package. In that case, the object has the namespace prefix of the installed managed package. This field's value is the namespace prefix of the Developer Edition organization of the package developer. 		
	 In organizations that are not Developer Edition organizations, NamespacePrefix is only set for objects that are part of an installed managed package. There is no namespace prefix for all other objects. 		
ProcessDefinition	Туре		
	textarea		
	Properties		
	Nillable		
	Description		
	The name of the process group for the batch process job definition.		
ProcessGroup	Туре		
	string		
	Properties		
	Filter, Group, Nillable, Sort		
	Description		
	The team or group for which the definition processes records.		
SourceObjectName	Туре		
	string		
	Properties		
	Filter, Group, Nillable, Sort		
	Description		
	The API name of the object whose records are processed.		
Туре	Туре		
	string		
	Properties		
	Filter, Group, Nillable, Sort		
	Description		
	The type of process for which the Batch Management job processes records.		
	Possible values are:		
	• Flow		
	• LoyaltyProgramProcess		
	This field is available in API version 55.0 and later.		

Field	Details
TypeInstance	Туре
	string
	Properties Filter, Group, Nillable, Sort
	Description The API name of the process that's processed by the Batch Job definition.

Batch Management Metadata API

Use a Metadata API to create, update, and activate Batch Management jobs.

BatchProcessJobDefinition

Represents the details of a Batch Management job definition. This type extends the Metadata metadata type and inherits its fullName field.

BatchProcessJobDefinition

Represents the details of a Batch Management job definition. This type extends the Metadata metadata type and inherits its fullName field.



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

EDITIONS

Available in: Lightning Experience

Available in: Batch Management is available with Enterprise, Unlimited, and Performance Editions with the Loyalty Management, Manufacturing Cloud, Rebate Management, or Accounting Subledger

File Suffix and Directory Location

BatchProcessJobDefinition components have the suffix .batchProcessJobDefinition and are stored in the batchProcessJobDefinitions folder.

Version

BatchProcessJobDefinition components are available in API version 51.0 and later.

Special Access Rules

To use this metadata type, your Salesforce org must have the Loyalty Management or the Rebate Management license. The Loyalty Program Process type is only available in orgs that have Loyalty Management enabled.

Field Name	Field Type	Description
batchSize	integer	Required. Number of records that each Batch Management job can process. Flow type Batch Management jobs can process up to 2000

Field Name	Field Type	Description
		records and Loyalty Program Process type Batch Management jobs can process up to 250 records.
dataSource	BatchDataSource on page 306[]	Required. Source of information whose records must be processed by the Batch Management job.
description	string	Description of the Batch Management job, up to 255 characters.
executionProcessApiName	string	API name of process that must be executed by the Batch Management job. This field is available in API version 55.0 and later.
		• If the batch job's type is Flow, enter the API name of an active flow that the batch job must execute.
		 If the batch job's type is Loyalty Program Process, enter:
		 Transaction_Journals if you want the batch job to process Transaction Journal records by applying the applicable active loyalty program process of the type Transaction Journal.
		 API name of an active loyalty process of the type TierProcessing if you want the batch job to run the loyalty program process to assess the tier of eligible members. The API name consists of the name of the process, the process type, and the name of the loyalty program separated by two consecutive underscores. For example, the process API name is Update Member TierTierProcessingInner Circle if the process name is Update Member Tier, the process type is TierProcessing, and the loyalty program name is Inner Circle.
		You can use database-based APEX classes that let you use flex queues in the Batch Management job, allowing to place more than 5 jobs in a queue. This functionality is applicable to all Industry Clouds that use managed packages. See Apex Flex Queue.
flowApiName	string	API name of an active flow process that must be executed by the Batch Management job.
		Note: You can either specify the flow API name in the executionProcessApiName field or in the flowApiName field.
flowInputVariable	string	Input variable of associated flow that is used by the batch job to uniquely identify records.
masterLabel	string	Required. Name of the Batch Management job, up to 80 characters.
processGroup	string	Required. Name of the group for which the Batch Management job processes records.
retryCount	integer	Required. Number of times this Batch Management job must be rerun in case it fails. The maximum retry count is 3. Valid values are 1–3.

Field Name	Field Type	Description
retryInterval	integer	Required. Number of milliseconds after which the Batch Management job must be rerun in case it fails. Valid values are 1,000–10,000.
status	string	Indicates the status of the Batch Management job. Valid values are Active and Inactive.
type	string (enumeration of type string)	The type of process that the Batch Management job must execute. This field is available in API version 55.0 and later. Valid values are:
		• Flow
		• Loyalty Program Process

BatchDataSource

Represents the source of information whose records must be processed by the Batch Management job.

Field Name	Field Type	Description
condition	string	Required. Criteria defined to filter the records.
criteria	string	Type of filter criteria that's used to filter records for processing.
dataSourceType	string	Type of data source that's used to create the batch job definition. Valid values are: SingleSobject MultiSobject Available in API version 64.0 and later.
filters	BatchDataSrcFilterCriteria on page 307[]	Filter criterion that decides which records must be processed by the Batch Management job.
orderFields	BatchDataSourceOrderField on page 308	Fields that are used to order the records before the records are added to a batch in a job.
sourceObject	string	Required. API name of an object whose records must be processed by the batch job.
		If the batch job type is Loyalty Program Process, the source object must be:
		• Transaction Journal if the batch job is used to process transaction journals by applying the applicable loyalty program process.
		 An object that stores the details of loyalty program members whose tier must be assessed by the loyalty program process specified in the executionProcessApiName field.

Field Name	Field Type	Description
sourceObjectField	string	API name of the source object field that uniquely identifies records for which the batch job is executed. This field is available in API version 57.0 and later.
		This field is only applicable when the batch job's type is Loyalty Program Process and a TierProcess type active loyalty program process is specified in the <code>executionProcessApiName</code> field. Specify the API name of a field that is a lookup to the LoyaltyProgramMember object and uniquely identifies the members whose tier must be assessed.

Batch Data Src Filter Criteria

Represents the filter conditions that decide which records must be processed by the Batch Management job.

Field Name	Field Type	Description
domainObjectName	string	Name of the object the field is associated with. Available in API version 64.0 and later.
dynamicValueType	string	Data type of the input variable used as a filter.
fieldName	string	Required. Name of the field that must be used to filter records.
fieldPath	string	Stores the path to a field in the object. Available in API version 64.0 and later.
fieldValue	string	Required. Value of the field that must be filtered. Specify the field if isDynamicValue is set to False.
isDynamicValue	boolean	Required. Indicates whether the filter criteria is dynamic.
operator	string (enumeration of type string)	Required. Operator that is specified in the filter criteria. Valid values are: equals excludes greaterThan greaterThanOrEqualTo in includes lessThan LessThanOrEqualTo GreaterOrEqual like notEquals notIn
sequenceNo	integer	Required. Sequence number used to refer the criteria in a filter.

BatchDataSourceOrderField

Represents the fields that are used to group data.

Fields

Field Name	Field Type	Description
domainObjectName	string	Required. Name of the object the field is associated with. Available in API version 64.0 and later.
fieldName	string	Required. Name of the field that must be used to filter records. Available in API version 64.0 and later.
fieldPath	string	Required. Stores the path to a field in the object. Available in API version 64.0 and later.

Declarative Metadata Sample Definition

The following is an example of a BatchProcessJobDefinition component.

```
<?xml version="1.0" encoding="UTF-8"?>
<BatchProcessJobDefinition xmlns="http://soap.sforce.com/2006/04/metadata">
  <batchSize>10</batchSize>
   <dataSource>
      <condition>1</condition>
      <criteria>all</criteria>
      <filters>
         <dynamicValue>false</dynamicValue>
         <dynamicValueType>string</dynamicValueType>
         <fieldName>Name</fieldName>
         <fieldValue>abcd</fieldValue>
         <operator>equals</operator>
         <sequenceNo>1</sequenceNo>
      </filters>
      <sourceObject>Account</sourceObject>
   </dataSource>
   <flowApiName>Flow1</flowApiName>
   <flowInputVariable>recordId</flowInputVariable>
   <masterLabel>BatchJob1</masterLabel>
   cprocessGroup>Loyalty/processGroup>
   <retryCount>2</retryCount>
   <retryInterval>1000</retryInterval>
   <status>Inactive</status>
   <description>test</description>
   <type>Flow</type>
   <executionProcessApiName>testFlow</executionProcessApiName>
</BatchProcessJobDefinition>
```

The following is an example of a Flow object used in Metadata API.

```
<?xml version="1.0" encoding="UTF-8"?>
```

```
<!--
  ~ Copyright 2020 Salesforce, Inc.
  ~ All Rights Reserved
  ~ Company Confidential
<Flow xmlns="http://soap.sforce.com/2006/04/metadata">
   <apiVersion>51.0</apiVersion>
   <interviewLabel>Flow1 {!$Flow.CurrentDateTime}</interviewLabel>
   <label>Flow1</label>
   cprocessMetadataValues>
     <name>BuilderType</name>
     <value>
        <stringValue>LightningFlowBuilder</stringValue>
     </value>
   </processMetadataValues>
   cessMetadataValues>
     <name>OriginBuilderType</name>
        <stringValue>LightningFlowBuilder</stringValue>
     </value>
   cprocessType>AutoLaunchedFlow
   <recordLookups>
     <name>getAcc</name>
     <label>getAcc</label>
     <locationX>614</locationX>
     <locationY>465
     <assignNullValuesIfNoRecordsFound>false</assignNullValuesIfNoRecordsFound>
     <filterLogic>and</filterLogic>
     <filters>
        <field>Id</field>
        <operator>EqualTo</operator>
        <value>
           <elementReference>recordId</elementReference>
        </value>
     </filters>
     <getFirstRecordOnly>true</getFirstRecordOnly>
     <object>Account</object>
     <storeOutputAutomatically>true</storeOutputAutomatically>
   </recordLookups>
   <start>
     <locationX>73</locationX>
     <locationY>213</locationY>
     <connector>
        <targetReference>getAcc</targetReference>
     </connector>
   </start>
   <status>Draft</status>
   <variables>
     <name>recordId</name>
     <dataType>String</dataType>
     <isCollection>false</isCollection>
     <isInput>true</isInput>
     <isOutput>false</isOutput>
```

```
</randalles>
</Flow>
```

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

Wildcard Support in the Manifest File

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

Batch Management Invocable Actions

Run an active Batch Management job definition. For more information on custom invocable actions, see **REST API Developer Guide** and **Actions Developer Guide**.

Batch Job Actions

Run an active Batch Management job definition. This action executes a defined Batch Management job asynchronously.

Submit Failed Records Batch Job

Run to resubmit an existing batch job with failed records for processing. This action executes the batch job asynchronously.

Batch Job Actions

Run an active Batch Management job definition. This action executes a defined Batch Management job asynchronously.

A Batch Management job processes a flow in manageable parts. For more information about running an active Batch Management jobs, see Schedule a Batch Job in Salesforce Help.

This object is available in API version 51.0 and later.

Supported REST HTTP Methods

URI

```
/services/data/vXX.X/actions/custom/batchJobAction
```

Formats

JSON

HTTP Methods

GET, POST

Authentication

Authorization: Bearer token

Inputs

The batch job action uses the batch job definition ID and input variables to execute the job and generate a batch job ID. The input values vary according to the input variables in that flow.

Outputs

Output	Details
batchJobId	Type string
	Description ID of the batch job generated after the request is successful. This batch job ID is used to track the progress of the batch job in Monitor Workflow Services.

Usage

A request body is always required. The input values vary according to the input variables in that flow. If your batch job doesn't require any input variables, you still must send an empty JSON body.

```
{
    "inputs": [{}]
}
```

JSON Sample Request

```
"noOfEmployees": 900,
  "accountIndustry": "Technology"
}
```

JSON Sample Response

```
{
   "batchJobId": "01Mxx0000A000001EAA"
   "accepted": "true"
}
```

Submit Failed Records Batch Job

Run to resubmit an existing batch job with failed records for processing. This action executes the batch job asynchronously. This object is available in API version 52.0 and later.

Supported REST HTTP Methods

URI

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

Formats

JSON

HTTP Methods

GET, POST

Authentication

Authorization: Bearer token

Inputs

Input	Details
failedRecordIds	Type array
	Description The IDs of failed records in a batch job.
parentBatchJobId	Type string
	Description Required. The ID of a batch job with failed records.

Outputs

Output	Details
batchJobId	Type string
	Description The ID of a batch job generated after the request is successful. This batch job ID is used to track the progress of the batch job in Monitor Workflow Services in the org.
status	Type string
	Description Indicates whether a batch job succeeded or failed.

Usage

JSON Sample Request

```
{
   "inputs": [{
        "parentBatchJobId": "0mdRM0000004DXrYAM",
        "failedRecordIds": [
            "001RM000005AG0bYAG", "001RM000005AERZYA4", "001RM000005AG0WYAW"
        ]
    }]
}
```

JSON Sample Response

```
[ {
    "actionName" : "submitFailedRecordsBatchJob",
    "errors" : null,
    "isSuccess" : true,
    "outputValues" : {
        "batchJobId" : "0mdRM0000004DZ9YAM"
    }
} ]
```

Monitor Workflow Services

The Montior Workflow Services standard objects can be used to track the run of Data Processing Engine definitions and Batch Management jobs. During a run, you can view details about each part that the run is broken down into. After the run is complete, you can view its status and the records which weren't processed during the run.

The objects of Monitor Workflow Services aren't available in Object Manager of your Salesforce org.

BatchJob

Represents an instance of a batch job that is either running and has been run. This object is available in API version 51.0 and later.

BatchJobPart

Represents one part of a batch job. This object is available in API version 51.0 and later.

BatchJobPartFailedRecord

Represents records that a batch job part couldn't successfully process. This object is available in API version 51.0 and later.

BatchJob

Represents an instance of a batch job that is either running and has been run. This object is available in API version 51.0 and later.

Supported Calls

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

EDITIONS

Available in: Lightning Experience

Available in: Monitor
Workflow Services is
available with Enterprise,
Unlimited, and Performance
Editions where Data
Processing Engine or Batch
Management is available

Field	Details
BatchJobDefinitionId	Type reference
	Properties Filter, Group, Sort
	Description The unique identifier of the associated batch job definition.
	This is a relationship field.
	Relationship Name BatchJobDefinition
	Relationship Type Lookup
	Refers To BatchJobDefinition
BatchJobDefinitionName	Type string
	Properties Filter, Group, Sort
	Description The developer name of the associated batch job definition.
EndTime	Type dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp when the batch job run was completed.
ErrorDescription	Type string
	Properties Filter, Nillable, Sort
	Description The error message in case the batch job run failed.
ExternalReference	Туре
	string
	Properties Filter, Group, Nillable, Sort

Field	Details
	Description The unique identifier of the process that's running or has run the batch job.
IsDebugOn	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	The default value is false.
IsDebugRecipeDeleted	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	The default value is false.
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp for when the current user last viewed the batch job.
LastViewedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp for when the current user last viewed this item.
Name	Type string
	Properties Filter, Group, idLookup, Sort
	Description The name of the batch job.
OwnerId	Туре
	reference

Field	Details
	Properties Filter, Group, Sort
	Description
	Unique identifier of the user who initiated the batch job run.
	This is a polymorphic relationship field.
	Relationship Name Owner
	Relationship Type Lookup
	Refers To Group, User
ProcessGroup	Type string
	Properties Filter, Group, Sort
	Description The group or team for which the batch job is run.
RetryCount	Type int
	Properties Filter, Group, Nillable, Sort
	Description The number of times the batch job run is automatically rerun in case it fails.
RuntimeParameter	Type textarea
	Properties Nillable
	Description The values of the input variables that are used as filter criteria in a Batch Management job.
StartTime	Type dateTime
	Properties
	Filter, Nillable, Sort
	Description The timestamp when the batch job run was started.

Field	Details
Status	Type picklist
	Properties Filter, Group, Restricted picklist, Sort
	Description The status of the batch job run.
	Possible values are:
	• Canceled
	• Completed
	 CompletedWithFailures
	• Failed
	• InProgress
	• Submitted
Туре	Туре
	picklist
	Properties Defaulted on create, Filter, Group, Restricted picklist, Sort
	Description The type of batch job that is run.
	Possible values are:
	Calc—Data Processing Engine
	• DecisionTableRefresh
	• Flow

Associated Objects

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

BatchJobFeed

Feed tracking is available for the object.

BatchJobHistory

History is available for tracked fields of the object.

BatchJobPart

Represents one part of a batch job. This object is available in API version 51.0 and later.

When a batch job is run, it is divided in to multiple parts. Each part is used to process a specific number of records.

Supported Calls

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

Field	Details
BatchJobId	Type reference
	Properties
	Filter, Group, Sort
	Description The unique identifier of the associated batch job.
	This is a relationship field.
	Relationship Name BatchJob
	Relationship Type Lookup
	Refers To BatchJob
EndTime	Type dateTime
	Properties Filter, Nillable, Sort
	Description The timestamp when the batch job part was processed.
ErrorDescription	Туре
	string
	Properties Filter, Nillable, Sort
	Description The error message in case the batch job part failed.
FailedRecordCount	Type int
	Properties Filter, Group, Nillable, Sort
	Description The number of records that the batch job part couldn't process.

Field	Details
FailedRecFile	Type FILE
	Properties Filter, Group, Sort
	Description The file containing failed records downloaded as CSV, JSON, or TXT formats during a Data Processing Engine definition's run by using CRM Analytics (CRMA) or Data Cloud runtime. Available in API version 63.0 and later.
InputRecordCount	Type int
	Properties Filter, Group, Nillable, Sort
	Description The number of records that the batch job part must process.
Name	Type string Properties Filter, Group, idLookup, Sort
	Description The name of the batch job part.
OutputRecordCount	Type int
	Properties Filter, Group, Nillable, Sort
	Description The number of records the batch job part has processed.
ParentBatchJobPartId	Type reference
	Properties Filter, Group, Nillable, Sort
	Description The unique identifier of the part batch job part associated with the batch job part.
	This is a relationship field.
	Relationship Name ParentBatchJobPart
	Relationship Type Lookup

Field	Details	
	Refers To BatchJobPart	
RetryCount	Type int	
	Properties Filter, Group, Nillable, Sort	
	Description The number of times the batch job part is automatically rerun in case it fails.	
StartTime	Type dateTime	
	Properties Filter, Nillable, Sort	
	Description The timestamp when the batch job part's run was started.	
Status	Type picklist	
	Properties Defaulted on create, Filter, Group, Restricted picklist, Sort	
	Description The status of the batch job part.	
	Possible values are:	
	• Canceled—Canceled	
	• Completed	
	• Failed	
	• InProgress—In Progress	
Туре	Type picklist	
	Properties Filter, Group, Nillable, Restricted picklist, Sort	
	Description The type of node in case the associated batch job is of the type Calc (Data Processing Engine).	
	Possible values are:	
	• Aggregate	
	• Append	
	• Compute	
	• Custom	

Field	Details
	• Datasync
	• Filter
	• Forecast
	• Hierarchy
	• Join
	• Slice
	• Source
	• Transform
	• Writeback

Associated Objects

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

BatchJobPartFeed

Feed tracking is available for the object.

BatchJobPartHistory

History is available for tracked fields of the object.

BatchJobPartFailedRecord

Represents records that a batch job part couldn't successfully process. This object is available in API version 51.0 and later.

Supported Calls

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

Field	Details
BatchJobId	Type reference
	Properties Filter, Group, Nillable, Sort
	Description The unique identifier of the associated batch job.
	This is a relationship field.
	Relationship Name BatchJob

Field	Details
	Relationship Type Lookup
	Refers To
	BatchJob
BatchJobPartId	Type reference
	Properties Filter, Group, Sort
	Description The unique identifier of the associated batch job part.
	This is a relationship field.
	Relationship Name BatchJobPart
	Relationship Type Lookup
	Refers To BatchJobPart
ErrorDescription	Туре
	string
	Properties Filter, Nillable, Sort
	Description The error message that indicates why the batch job part couldn't process the records.
Name	Туре
	string
	Properties Filter, Group, idLookup, Sort
	Description Description
	The name of the batch job part failed record.
Record	Type string
	Properties
	Filter, Group, Nillable, Sort
	Description The unique identifier of the batch record that processed the failed records.

Field Details	
RecordName	Type string
	Properties Filter, Group, Nillable, Sort
	Description The name of the record that's associated with the batch job part failed record.
ResubmittedBatchJobId	Type reference
	Properties Filter, Group, Nillable, Sort
	Description The batch job used to submit failed records. This field is available in API version 52.0 and later.
	This is a relationship field.
	Relationship Name ResubmittedBatchJob
	Relationship Type Lookup
	Refers To BatchJob
Status	Type picklist
	Properties Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort
	Description Specifies the status of the failed records. This field is available in API version 52.0 and later.
	Possible values are:
	• Failed
	• Resubmitted
	The default value is 'Failed'.

Associated Objects

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

Batch Job Part Failed Record Feed

Feed tracking is available for the object.

Batch Job Part Failed Record History

History is available for tracked fields of the object.

SHIP AND DEBIT PROCESS MANAGEMENT STANDARD OBJECTS

Ship and Debit Process Management data model provides objects and fields to create and manage end-to-end ship and debit programs. Use these objects to define special pricing and discounts, enabling manufacturers to compensate partners for competitively priced products and protect partner margins.

EDITIONS

Available in: Lightning Experience

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

Channel Partner Inventory Tracking Object in Ship and Debit Process Management

Channel Partner Inventory Tracking provides access to a standard object that you can use in Ship and Debit Process Management to monitor the deduction details and link credit and debit transactions.

Rebate Management Objects in Ship and Debit Process Management

Rebate Management provides access to standard objects that you can use in Ship and Debit Process Management to create and manage end-to-end ship and debit programs.

Channel Partner Inventory Tracking Object in Ship and Debit Process Management

Channel Partner Inventory Tracking provides access to a standard object that you can use in Ship and Debit Process Management to monitor the deduction details and link credit and debit transactions.

For more information about the Channel Partner Inventory Tracking object, refer to this resource.

PartnerUnsoldInvLedger on page 9

Rebate Management Objects in Ship and Debit Process Management

Rebate Management provides access to standard objects that you can use in Ship and Debit Process Management to create and manage end-to-end ship and debit programs.

For more information about the Rebate Management objects, refer to these resources.

- RebateClaim on page 170
- RebateClaimAdjustment on page 178
- RebateMemberClaimAggregrate on page 180
- RebatePartnerSpecialPrcTrm on page 190
- RebateProgram on page 197
- RebateProgramMember on page 200
- RebatePtnrSpclPrcTrmBnft on page 206

CHANNEL REVENUE MANAGEMENT ASSOCIATED OBJECTS

This section provides a list of objects associated to Channel Revenue Management standard objects with their standard fields.

Some fields may not be listed for some objects. To see the system fields for each object, see System Fields in the Object Reference for Salesforce and Lightning Platform.

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

StandardObjectNameFeed

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

StandardObjectNameHistory

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

StandardObjectNameOwnerSharingRule

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

StandardObjectNameShare

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

StandardObjectNameFeed

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

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

Supported Calls

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

Special Access Rules

In the internal org, users can delete all feed items they created. This rule varies in 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.

Field	Details
BestCommentId	Туре
	reference
	Properties Filter, Group, Nillable, Sort
	·
	Description The ID of the comment marked as best answer on a question post.
Body	Туре
	textarea
	Properties Nillable, Sort
	Description
	The body of the post. Required when Type is TextPost. Optional when Type is ContentPost Or LinkPost.
CommentCount	Туре
	int
	Properties
	Filter, Group, Sort
	Description
	The number of comments associated with this feed item.
ConnectionId	Туре
	reference
	Properties
	Filter, Group, Nillable, Sort
	Description When a PartnerNetworkConnection modifies a record that is tracked, the CreatedBy field contains the ID of the system administrator. The ConnectionId contains the ID of the PartnerNetworkConnection. Available if Salesforce to Salesforce is enabled for your
	organization.

Field	Details
InsertedById	Type reference
	Properties
	Group, Nillable, Sort
	Description ID of the user who added this item to the feed. For example, if an application migrates posts and comments from another application into a feed, the InsertedBy value is set to the ID of the context user.
isRichText	Type boolean
	Properties
	Defaulted on create, Filter, Group, Sort
	Description Indicates whether the feed item Body contains rich text. If you post a rich text feed comment using SOAP API, set IsRichText to true and escape HTML entities from the body. Otherwise, the post is rendered as plain text.
	Rich text supports the following HTML tags:
	•
	Tip: Though the $<$ br $>$ tag isn't supported, you can use $<$ p $> to create lines.$
	• <a>
	•
	• <code></code>
	• < <u>i</u> >
	• <u></u>
	• <s></s>
	•
	•
	• <1i>
	•
	The $<$ img $>$ tag is accessible only through the API and must reference files in Salesforce similar to this example: $<$ img $src=$ "sfdc://069B0000000mjh"> $<$ /img>
	Note: In API version 35.0 and later, the system replaces special characters in rich text with escaped HTML. In API version 34.0 and prior, all rich text appears as a plain-text representation.
LikeCount	Type int

Field	Details	
	Properties Filter, Group, Sort	
	Description The number of likes associated with this feed item.	
LinkUrl	Type url	
	Properties Nillable, Sort	
	Description The URL of a LinkPost.	
NetworkScope	Type picklist	
	Properties Group, Nillable, Restricted picklist, Sort	
	Description Specifies whether this feed item is available in the default Experience Cloud site, a specific Experience Cloud site, or all sites. This field is available in API version 26.0 and later, if digital experiences is enabled for your org.	
	NetworkScope can have the following values:	
	 NetworkId—The ID of the Experience Cloud site in which the FeedItem is available. If left empty, the feed item is only available in the default Experience Cloud site. 	
	 AllNetworks—The feed item is available in all Experience Cloud sites. 	
	Note the following exceptions for NetworkScope:	
	 Only feed items with a Group or User parent can set a NetworkId or a null value for NetworkScope. 	
	 For feed items with a record parent, users can set NetworkScope only to AllNetworks. 	
	 You can't filter a feed item on the NetworkScope field. 	
ParentId	Type reference	
	Properties Filter, Group, Sort	
	Description ID of the record that is tracked in the feed. The detail page for the record displays the feed.	
RelatedRecordId	Type reference	

Field	Details
	Properties Group, Nillable, Sort
	Description ID of the ContentVersion record associated with a ContentPost. This field is null for all posts except ContentPost.
Title	Type string
	Properties Group, Nillable, Sort
	Description The title of the feed item. When the Type is LinkPost, the LinkUrl is the URL and this field is the link name.
Туре	Type picklist
	Properties Filter, Group, Nillable, Restricted picklist, Sort
	Description The type of feed item. Values are:
	 ActivityEvent—indirectly generated event when a user or the API adds a Task associated with a feed-enabled parent record (excluding email tasks on cases). Also occurs when a user or the API adds or updates a Task or Event associated with a case record (excluding email and call logging).

• 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.

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

AnnouncementPost—Not used.

occurrence.

- ApprovalPost—generated when a user submits an approval.
- BasicTemplateFeedItem—Not used.
- CanvasPost—a post made by a canvas app posted on a feed.
- $\bullet \quad \texttt{CollaborationGroupCreated---} generated \ when a user \textit{creates a public group}.$
- CollaborationGroupUnarchived—Notused.
- 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
	• LinkPost—a post with an attached URL.
	 PollPost—a poll posted on a feed.
	 ProfileSkillPost—generated when a skill is added to a user's Chatter profile.
	 QuestionPost—generated when a user posts a question.
	 ReplyPost—generated when Chatter Answers posts a reply.
	 RypplePost—generated when a user creates a Thanks badge in WDC.
	 TextPost—a direct text entry on a feed.
	 TrackedChange—a change or group of changes to a tracked field.
	• UserStatus—automatically generated when a user adds a post. Deprecated.
Visibility	Туре
	picklist
	Properties Filter, Group, Nillable, Restricted picklist, Sort
	Description
	Specifies whether this feed item is available to all users or internal users only. This field is available if dgitial experiences is enabled for your org.
	Visibility can have the following values:
	 AllUsers—The feed item is available to all users who have permission to see the feed item.
	 InternalUsers—The feed item is available to internal users only.
	Note the following exceptions for Visibility:
	 For record posts, Visibility is set to InternalUsers for all internal users by default.
	 External users can set Visibility only to AllUsers.
	 On user and group posts, only internal users can set Visibility to InternalUsers.

Usage

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

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

Object That Follows This Model

This object follows the standard pattern for associated feed objects.

- BatchJob
- BatchJobPart
- BatchJobPartFailedRecord

StandardObjectNameHistory

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

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

Supported Calls

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

Special Access Rules

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

Field Name	Details
StandardObjectNameId	Type reference
	Properties Filter, Group, Sort
	Description ID of the standard object.
DataType	Type picklist
	Properties Filter, Group, Nillable, Restricted picklist, Sort
	Description Data type of the field that was changed.
Field	Type picklist
	Properties Filter, Group, Restricted picklist, Sort

Field Name	Details
	Description Name of the field that was changed.
NewValue	Type anyType
	Properties Nillable, Sort
	Description New value of the field that was changed.
OldValue	Type anyType
	Properties Nillable, Sort
	Description Old value of the field that was changed.

Objects That Follow This Model

These objects follow the standard pattern for associated history objects.

- AccountLeadTime
- BatchJob
- BatchJobPart
- BatchJobPartFailedRecord
- PartnerStagedData
- PartnerUnsoldInventory
- PartnerUnsoldInvLedger
- PtnrlnvltmRecon
- PtnrlnvltmReconTrace

StandardObjectNameOwnerShoringRule

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

The object name is variable and uses StandardObjectNameOwnerSharingRule syntax. For example,

Channel Program Owner Sharing Rule is a rule for sharing a channel program with users other than the channel program owner. We list the available associated owner sharing rule objects at the end of this topic. For specific version information, see the standard object documentation.



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

Supported Calls

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

Special Access Rules

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

Field Name	Details
AccessLevel	Type picklist
	Properties Create, Filter, Group, Restricted picklist, Sort, Update
	Description Determines the level of access users have to records. Values are:
	Read (read only)Edit (read/write)
Description	Type textarea
	Properties Create, Filter, Nillable, Sort, Update
	Description Description of the sharing rule. Maximum length is 1000 characters.
DeveloperName	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The unique name of the object in the API. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the

Field Name	Details
	object's name in a managed package and the changes are reflected in a subscriber's organization.
	Note: When creating large sets of data, always specify a unique DeveloperName for each record. If no DeveloperName is specified, performance slows down while Salesforce generates one for each record.
GroupId	Type reference
	Properties Create, Filter, Group, Sort
	Description ID of the source group. Records that are owned by users in the source group trigger the rule to give access.
Name	Туре
	string Properties Create, Filter, Group, idLookup, Sort, Update
	Description Label of the sharing rule as it appears in the UI. Maximum length is 80 characters.
UserOrGroupId	Type reference
	Properties Create, Filter, Group, Sort
	Description ID of the user or group that you are granting access to.

Objects That Follow This Model

These objects follow the standard pattern for associated owner sharing rule objects.

- AccountLeadTime
- PartnerStagedData
- PartnerUnsoldInventory

${\it StandardObjectName} \textbf{Share}$

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

The object name is variable and uses <code>StandardObjectNameShare</code> syntax. For example, AccountBrandShare is a sharing entry on an account brand. We list the available associated share objects at the end of this topic. For specific version information, see the standard object documentation.

Supported Calls

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

Special Access Rules

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

Field Name	Details
AccessLevel	Type picklist
	Properties Create, Filter, Group, Restricted picklist, Sort, Update
	Description The level of access allowed. Values are:
	All (owner)Edit (read/write)
	• Read (read only)
ParentId	Type reference
	Properties Create, Filter, Group, Sort
	Description ID of the parent record.
RowCause	Type picklist
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort
	Description Reason that the sharing entry exists.
UserOrGroupId	Type reference

Field Name	Details
	Properties Create, Filter, Group, Sort
	Description ID of the user or group that has been given access to the object.

Object That Follows This Model

This object follows the standard pattern for associated share objects.

- AccountLeadTime
- TransitTime
- PartnerStagedData
- PartnerUnsoldInventory