Financial Services Cloud Developer Guide

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FINANCIAL SERVICES CLOUD DEVELOPER GUIDE

Use the fields, objects, and metadata that extend Salesforce for Financial Services Cloud. Apex trigger information is also provided.

Fields and objects in the package have the `FinServ` namespace prefix. For example, `FinServ__IndividualId__c` is a custom field on Account. `FinServ__FinancialAccount__c` is a custom object. To refer to the standard Salesforce objects, see the Object Reference for Salesforce.

Note: The custom objects, components, classes, and triggers delivered in the Financial Services Cloud managed package are one API version behind the core Salesforce API. Financial Services Cloud standard objects have the same API version as core Salesforce. For example, if your org's API version is 43, the custom objects in the Financial Services Cloud managed package are API version 42, and the standard Financial Services Cloud objects are API version 43.

SEE ALSO:

Financial Services Cloud Admin Guide

FINANCIAL SERVICES CLOUD STANDARD OBJECTS

AccountAccountRelation

Represents a relationship between two accounts, such as between a household and a business account. This object is available in API version 61.0 and later.

Supported Calls

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

Special Access Rules

This is a standard object and is available only when you turn on the Group Membership Settings.

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The ID of the account associated with the record. This field is a relationship field. **Relationship Name** Account **Relationship Type** Lookup **Refers To** Account
`DeclarationType`	**Type** multipicklist **Properties** Create, Filter, Nillable, Restricted picklist, Update

Field	Details
	Description Specifies the formal manner or approach used to officially state the stakeholder's role or position. Possible values are: • `Official Register` • `Primary Research` • `Self Declaration` • `Third Party` • `Verified`
`EndDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date when the relationship ended.
`HierarchyType`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the hierarchy between accounts that are related. For example, an account is related to another account as a parent, peer, or child. Possible values are: • `Child` • `Parent` • `Peer` The default value is `Parent`.
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the relationship is active (`true`) or not (`false`). The default value is `false`.
`IsShareholder`	**Type** boolean

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the stakeholder is a shareholder (true) or not (false). The default value is `false`.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Group, Sort **Description** Name of the account account relationship.
`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

Field	Details
`RelatedInverseRecordId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The record that specifies the inverse relationship between the accounts. This field is a relationship field. **Relationship Name** RelatedInverseRecord **Relationship Type** Lookup **Refers To** AccountAccountRelation
`ShareholderHierarchyLevel`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the hierarchical level between the account and the intermediate shareholder. The shareholder hierarchy level is applicable only to an intermediate share holder.
`ShareholderHierarchyRole`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the shareholder's ownership type. Possible values are: • `Domestic Ultimate Owner` • `Immediate Shareholder` • `Intermediate Shareholder` • `Ultimate Beneficial Owner`
`ShareholderType`	**Type** multipicklist **Properties** Create, Filter, Nillable, Restricted picklist, Update **Description** Specifies the type of the shareholder.

Field	Details
	Possible values are: • `Shareholding` • `Voting Rights` • `Beneficiary of a Trust` • `Sole Proprietor` • `Partner`
`StartDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date when the relationship started.
`TotalSharePercent`	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** The total percentage of shares owned by the stakeholder, combining both direct and indirect ownership.

AccountFinancialSummary

Represents the summary of financial details associated with an account. This object is available in API version 62.0 and later.

Supported Calls

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

Special Access Rules

This is a standard object and is available only when you turn on the Financial Summary Rollup settings.

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The associated account for which the financial summary is computed. This field is a relationship field. **Relationship Name** Account **Relationship Type** Master-detail **Refers To** Account (the master object)
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date when a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date when a user viewed this record.
`LatestTransactionDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date on which the latest transaction related to any of the financial accounts was recorded.
`LatestTransactionUpdatedDt`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description The date when the latest transaction was last updated.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the account financial summary record.
`PartyRelationshipGroupId`	**Type** reference **Properties** Filter, Group, Nillable, Sort **Description** The party relationship group associated with the account. Note: • This field is auto populated, if the account record type is a business account and has an associated PartyRelationshipGroupID. This field is a relationship field. **Relationship Name** PartyRelationshipGroup **Refers To** PartyRelationshipGroup
TotalFinancialAccountBal	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The net balance of all the financial accounts associated with the account.
`TotFinclAcctBalanceUpdtDt`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date when the total financial account balance was last updated.
`TotalHeldFinclAcctValue`	**Type** currency

Field	Details
	Properties Create, Filter, Nillable, Sort, Update **Description** The total combined value of all financial accounts held with the financial institution.
`TotHldFinclAcctValUpdtDt`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date when the total held financial account value was last updated.
`TotalInsurancePolicyCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The total number of active insurance policies associated with the account.
`TotInsurancePlcyCntUpdtDt`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date when the total insurance policy count was last updated.
`TotalLiabilityValue`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The total value of all the liabilities associated with the account.
`TotLiabilityValueUpdtDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date when the total liability value was last updated.
`TotalNonFinancialAssetVal`	**Type** currency

Field	Details
	Properties Create, Filter, Nillable, Sort, Update **Description** The total value of all the non-financial assets associated with the account.
`TotNonFinclAssetValUpdtDt`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date when the total non-financial asset value was last updated.
`TotalBankDepositValue`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The total value of all the bank deposits associated with the account.
`TotalBankDepositValUpdtDt`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date when the total bank deposit value was last updated.
`TotalClaimCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The total number of insurance claims associated with the account.
`TotalClaimCountUpdtDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date when the total claim count was last updated.
`TotalFinancialAccountCount`	**Type** int

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The total count of all the financial accounts associated with the account.
TotalFinclAcctCountUpdtDt	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date when the total financial account count was last updated.
TotalGrossWrittenPremAmt	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The sum of all gross premium amounts for all active insurance policies associated with the account.
TotalGrWrtPremAmtUpdtDt	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date when the total gross written premium amount was last updated.
TotalInvestmentValue	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The total value of all the investment accounts associated with the account.
TotalInvestmentValUpdtDt	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date when the total investment value was last updated.

Field	Details
TotalManagedInvestmentValue	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The total managed investment value of all the investment accounts managed by the financial institution.
TotalMngInvstValUpdtDate	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date when the total managed investment value was last computed.
TotalOtsdCreditAmount	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The sum of the outstanding amounts of automotive loans, credit cards, home equity line of credits, mortgages, and loan accounts associated with the account.
TotalOtsdCreditAmtUpdtDt	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date when the total outstanding credit amount was last updated.
TotalPaidClaimAmount	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The sum of all the claim amounts paid for the claims associated with the account.
TotalPaidClaimAmtUpdtDate	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description The date when the total paid claim amount was last updated.
`TotalPremiumAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The sum of premium amounts of all the active policies associated with the account.
`TotalPremiumAmountUpdtDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date when the total premium amount was last updated.
`TotalSumInsured`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The sum of the insured values of all the active policies associated with the account.
`TotalSumInsuredUpdtDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date when the total sum insured was last updated.

Associated Objects

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

AccountFinancialSummaryChangeEvent on page 1009 (API Version 63.0)
Change events are available for the object.

AccountFinancialSummaryHistory on page 1021 (API Version 63.0)
History is available for tracked fields of the object.

AccountParticipant

Represents information about a participant in the context of an account record. This object is available in API version 49.0 and later.

Supported Calls

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

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The ID of the account related to the participant.
`Comments`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Notes about this participant.
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether this participant is active.
`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** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** An automatically generated name for the participant.
`ParticipantId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The ID of the user or group related to the participant.
`ParticipantRoleId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The ID of the object-based role for this participant.

Associated Objects

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

AccountParticipantChangeEvent on page 1009
Change events are available for the object.

AccountParticipantFeed on page 1013 (API version 52.0)
Feed tracking is available for the object.

AccountParticipantHistory on page 1021 (API version 52.0)
History is available for tracked fields of the object.

AccountPlanObjectiveCategory

Represents an objective category that's used to group the account plan objectives to streamline tracking and analysis for management. This object is available in API version 62.0 and later.

Supported Calls

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

Fields

Field	Details
`Description`	**Type** textarea **Properties** Create, Nillable, Update **Description** The description of the account plan objective category.
`EndDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The end date of the account plan objective category.
`IsActiveObjectiveCategory`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the objective category is active (true) or not (false). The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort

Field	Details
	Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the account plan objective category.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the user who created the record. This field is a polymorphic relationship field. **Relationship Name** Owner **Refers To** Group, User
`StartDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The start date of the account plan objective category.

Associated Objects

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

AccountPlanObjectiveCategoryChangeEvent on page 1009
Change events are available for the object.

AccountPlanObjectiveCategoryHistory on page 1021
History is available for tracked fields of the object.

AccountPlanObjectiveCategoryOwnerSharingRule on page 1026
Sharing rules are available for the object.

AccountPlanObjectiveCategoryShare on page 1029
Sharing is available for the object.

AppFormProdtPrpsAttribute

Represents the attributes and values of an Application Form Product Proposal record. This object is available in API version 62.0 and later. Available with Digital Lending permission set.

Supported Calls

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

Fields

Field	Details
`AppFormProductProposalId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** Application form product proposal to which the attribute is associated. This field is a relationship field. **Relationship Name** AppFormProductProposal **Relationship Type** Master-detail **Refers To** ApplicationFormProductProposal (the master object)
`AttributeDefinitionId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The attribute definition id. This field is a relationship field. **Relationship Name** AttributeDefinition **Refers To** AttributeDefinition

Field	Details
AttributeName	**Type** string **Properties** Filter, Group, idLookup, Sort **Description** The name of the attribute.
AttributePicklistValueId	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The Attribute Picklist Value Id. This field is a relationship field. **Relationship Name** AttributePicklistValue **Refers To** AttributePicklistValue
AttributeValue	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The value of the attribute.
ExternalId	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID that unique references the relationship in an external data source.

Associated Objects

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

AppFormProdtPrpsAttributeChangeEvent on page 1009
Change events are available for the object.

AppFormProductCollateral

Represents a physical or financial asset that is pledged as collateral for an application form product. This object is available in API version 65.0 and later. Available with Digital Lending permission set.

Supported Calls

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

Fields

Field	Details
`ApplicationFormProductId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The Application Form Product associated with the application form product collateral. For example, A product, such as a loan, that's applied for and secured by a pledged financial asset as collateral. This field is a relationship field. **Relationship Name** ApplicationFormProduct **Relationship Type** Master-detail **Refers To** ApplicationFormProduct (the master object)
`CollateralAssetId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The financial or physical asset reference pledge as collateral. This field is a relationship field. **Relationship Name** CollateralAsset **Refers To** PartyFinancialAsset

Field	Details
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
PartyFinancialAssetId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The Party Financial Asset associated with the application form product collateral. For example, a party's financial asset that's pledged as collateral for a loan. This field is a relationship field. **Relationship Name** PartyFinancialAsset **Refers To** PartyFinancialAsset
PartyFinancialAssetLienId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The lien for party financial asset that is created when the collateral is approved and the lender's legal claim is registered. This field is a relationship field. **Relationship Name** PartyFinancialAssetLien **Refers To** PartyFinancialAssetLien

Field	Details
`PledgedValue`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The value declared for the party financial asset that's intended to be used as collateral.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the current evaluation status of the application form product collateral to determine the party financial asset's eligibility as collateral. Possible values are: • `Accepted` • `Declared` • `Rejected` • `Under Review`

Associated Objects

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

AppFormProductCollateralChangeEvent on page 1009
Change events are available for the object.

AppFormProductCollateralFeed on page 1013
Feed tracking is available for the object.

AppFormProductCollateralHistory on page 1021
History is available for tracked fields of the object.

AppFormProductCollateralOwnerSharingRule on page 1026
Sharing rules are available for the object.

AppFormProductCollateralShare on page 1029
Sharing is available for the object.

AppFormProductParticipant

Represents information about the application form product participant. This object is available in API version 61.0 and later.

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

Supported Calls

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

Fields

Field	Details
`ApplicationFormProductId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The application form product associated with the participant. This field is a relationship field. **Relationship Name** ApplicationFormProduct **Relationship Type** Master-detail **Refers To** ApplicationFormProduct (the master object)
`Comments`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The additional information about the participant.
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the application form product participant is active (`true`) or not (`false`). The default value is `false`.
`LastReferencedDate`	**Type** dateTime

Field	Details
	Properties Filter, Nillable, Sort **Description** Timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Timestamp for when the current user last viewed this record.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the application form product participant record.
`ParticipantId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The participant that's associated with the application form. This field is a polymorphic relationship field. **Relationship Name** Participant **Relationship Type** Lookup **Refers To** Group, User
`ParticipantRoleId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** Represents details like the name and associated default access level for a role that a participant can have in the context of a parent record. This field is a relationship field.

Field	Details
	Relationship Name ParticipantRole **Relationship Type** Lookup **Refers To** ParticipantRole

Associated Objects

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

AppFormProductParticipantChangeEvent on page 1009
Change events are available for the object.

AppFormProductParticipantFeed on page 1013
Feed tracking is available for the object.

AppFormProductParticipantHistory on page 1021
History is available for tracked fields of the object.

Applicant

Represents information about the individual or group that are applying. This object is available in API version 59.0 and later.

Supported Calls

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

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The account ID associated with the applicant. This field is a relationship field. **Relationship Name** Account

Field	Details
	Relationship Type Lookup **Refers To** Account
`ApplicationFormId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The application that's submitted for a product request. This field is a relationship field. **Relationship Name** ApplicationForm **Relationship Type** Lookup **Refers To** ApplicationForm
`BirthDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date of birth of the applicant.
`BusinessEntityName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The registered name of the business entity associated with the applicant.
`BusinessEntityPrimCtctId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The primary contact for the business entity associated with the applicant. This field is a polymorphic relationship field.

Field	Details
	Relationship Name BusinessEntityPrimaryCtct **Relationship Type** Lookup **Refers To** Applicant, Contact
`BusinessEntityType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the type of the business entity associated with the applicant. Possible values are: • `Locally Incorporated Company` • `Sole Proprietorship` • `Foreign Company` • `Limited Partnership` • `General Partnership` • `Foundations` • `Trusts`
`ContactId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The related contact ID assocaited with the account. This field is a relationship field. **Relationship Name** Contact **Relationship Type** Lookup **Refers To** Contact
`Email`	**Type** email **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The email address of the applicant.
`FirstName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The first name of the applicant.
`GroupExposure`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The sum of all existing loans an applicant has with the financial institution to which they're applying for a new loan.
`LastName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The last name of the applicant.
`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.
`MiddleName`	**Type** string

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The middle name of the applicant.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** A unique number that represents the applicant.
`PartyProfileId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The party profile requesting a product with the application form. This field is a relationship field. **Relationship Name** PartyProfile **Relationship Type** Lookup **Refers To** PartyProfile
`Phone`	**Type** phone **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The applicant's phone number.
`PhoneType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the type of phone number provided by the applicant. Possible values are: • `Home`

Field	Details
	• Mobile
Role	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the role of the applicant. Possible values are: • Co-Applicant • Co-Signer • Guarantor • Primary Applicant
Salutation	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The applicant's salutation. Possible values are: • Dr. • Mr. • Mrs. • Ms. • Prof.
Stage	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the stage of the application for a product that is submitted by the applicant. Possible values are: • Approved • In Review • On Hold • Rejected

Field	Details
`Suffix`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The suffix of the applicant.
`Type`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the type of the applicant. Possible values are: • `Business` • `Individual`
`UniqueReferenceNumber`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The customer reference number of the applicant.

Associated Objects

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

ApplicantChangeEvent on page 1009
Change events are available for the object.

ApplicantFeed on page 1013
Feed tracking is available for the object.

ApplicantHistory on page 1021
History is available for tracked fields of the object.

ApplicantOwnerSharingRule on page 1026
Sharing rules are available for the object.

ApplicantShare on page 1029
Sharing is available for the object.

ApplicantApplicantRelation

Represents the relationship between applicants, where an applicant can be either a business entity or an individual. This object is available in API version 61.0 and later.

Supported Calls

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

Fields

Field	Details
`ApplicantId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** Represents information about a group that is applying. This field is a relationship field. **Relationship Name** Applicant **Relationship Type** Lookup **Refers To** Applicant
`ApplicantRole`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies how the applicant organization is associated with the related applicant. Possible values are: • `Parent` • `Subsidiary`
`DecisionMakingAuthorityType`	**Type** multipicklist **Properties** Create, Filter, Nillable, Restricted picklist, Update

Field	Details
	Description Specifies the type of the decision-making authority. Possible values are: • `Authorized Signatory` • `Board Member` • `Senior Managing Official`
`DeclarationType`	**Type** multipicklist **Properties** Create, Filter, Nillable, Restricted picklist, Update **Description** Specifies the formal manner or approach used to officially state the stakeholder's role or position. Possible values are: • `Official Register` • `Primary Research` • `Self declaration` • `Third Party` • `Verified`
`IsDecisionMakingAuthority`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the stakeholder is a decision-making authority (true) or not (false). The default value is `false`.
`IsShareholder`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the stakeholder is a shareholder (true) or not (false). The default value is `false`.
`LastReferencedDate`	**Type** dateTime

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

Field	Details
	Relationship Name RecordType **Relationship Type** Lookup **Refers To** RecordType
`RelatedApplicantId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The individual or group that's associated with the applicant. This field is a relationship field. **Relationship Name** RelatedApplicant **Relationship Type** Lookup **Refers To** Applicant
`RelatedApplicantRole`	**Type** multipicklist **Properties** Create, Filter, Nillable, Restricted picklist, Update **Description** Specifies how the related applicant is associated with the applicant organization. Possible values are: • `Subsidiary` • `Parent` • `CEO` • `CFO`
`ShareholderHierarchyLevel`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the hierarchical level between the account and the intermediate shareholder. The shareholder hierarchy level is applicable only to an intermediate share holder.

Field	Details
ShareholderHierarchyRole	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the shareholder's ownership type. Possible values are: • Domestic Ultimate Owner • Immediate Shareholder • Intermediate Shareholder • Ultimate Beneficial Owner
ShareholderType	**Type** multipicklist **Properties** Create, Filter, Nillable, Restricted picklist, Update **Description** Specifies the type of the shareholder. Possible values are: • Shareholding • Voting Rights • Beneficiary of a Trust • Sole Proprietor • Partner
StartDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the relationship between the applicant and the related applicant started.
TotalSharePercent	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** The total percentage of shares owned by the stakeholder, combining both direct and indirect ownership.

Associated Objects

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

ApplicantApplicantRelationChangeEvent on page 1009
Change events are available for the object.

ApplicantApplicantRelationFeed on page 1013
Feed tracking is available for the object.

ApplicantApplicantRelationHistory on page 1021
History is available for tracked fields of the object.

ApplicantApplicantRelationOwnerSharingRule on page 1026
Sharing rules are available for the object.

ApplicantApplicantRelationShare on page 1029
Sharing is available for the object.

ApplicationActionItem

Stores the action items assigned to a user on an application. This object is available in API version 61.0 and later. Available with Digital Lending permission set.

Supported Calls

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

Fields

Field	Details
`AssignedToId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The user assigned to the action item. This field is a polymorphic relationship field. **Relationship Name** AssignedTo **Relationship Type** Lookup **Refers To** Applicant, Group, User

Field	Details
`Description`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description of the action item.
`DueDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The due date of the action item.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Timestamp for when the current user last viewed this record.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the application action item record.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the user who created the application action item record.

Field	Details
	This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`RelatedApplnActnItmId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The related application action item that is created to manage a subsequent action item that is generated from an earlier action item. For example, if uploading identity proof documents is the main action item, then verifying the uploaded documents is a related action item. This field is a relationship field. **Relationship Name** RelatedApplnActnItm **Refers To** ApplicationActionItem
`RelatedRecordId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The record related to the action item. This field is a polymorphic relationship field. **Relationship Name** RelatedRecord **Relationship Type** Lookup **Refers To** Applicant, ApplicationForm, ApplicationFormProduct, ApplicationFormProductDev
`Status`	**Type** picklist **Properties** Create, Filter, Group, Sort, Update

Field	Details
	Description The status of the action item. Valid values are: • `Closed` • `In Progress` • `New`
`Subject`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The subject of the application action item.
`Type`	**Type** picklist **Properties** Create, Filter, Group, Sort, Update **Description** The type of application action item. Valid values are: • `Review Offer`

Associated Objects

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

ApplicationactionitemChangeEvent on page 1009
Change events are available for the object.

ApplicationActionItemFeed on page 1013
Feed tracking is available for the object.

ApplicationActionItemHistory on page 1021
History is available for tracked fields of the object.

ApplicationActionItemShare on page 1029
Sharing is available for the object.

ApplicationForm

Represents the high level information of an application that's submitted for the product. This object is available in API version 59.0 and later.

Supported Calls

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

Special Access Rules

The Usage Type field has to be populated when using the Application Form object. The picklist values for Usage Type are Onboarding, Loan Origination, and Other. The picklist values are fixed and you can't add more values.

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The account that's associated with the application. This field is a relationship field. **Relationship Name** Account **Relationship Type** Lookup **Refers To** Account
`BranchUnitId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the branch unit that owns the application. This field is a relationship field. **Relationship Name** BranchUnit **Relationship Type** Lookup **Refers To** BranchUnit

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

Field	Details
	Description The ID of the opportunity associated with the application. This field is a relationship field. **Relationship Name** Opportunity **Relationship Type** Lookup **Refers To** Opportunity
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the user who created the record. This is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`Stage`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The stage in the approval process of the application. Possible values are: • `Approved` • `Book to Core` • `DDE` • `In Progress` • `In Review` • `Initiated` • `Intake` • `Negotiation` • `Operations`

Field	Details
	• `Rejected` • `Submitted` • `Underwriting`
`SubmissionDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the application is submitted.
`ThirdPartyLoanProviderAccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the third party loan provider account associated with the application. This field is a relationship field. **Relationship Name** ThirdPartyLoanProviderAccount **Relationship Type** Lookup **Refers To** Account
`UsageType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the usage of application. Possible values are: • `Onboarding` • `Loan Origination` • `Other`

Associated Objects

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

ApplicationFormChangeEvent on page 1009
Change events are available for the object in API version 60.0 and later.

ApplicationFormFeed on page 1013
Feed tracking is available for the object.

ApplicationFormHistory on page 1021
History is available for tracked fields of the object.

ApplicationFormShare on page 1029
Sharing is available for the object.

ApplicationFormEvaluation

Represents the details of the evaluation performed for an application form. For example, the details of the evaluation of a loan application form by an underwriter. This object is available in API version 61.0 and later. Available with Digital Lending permission set.

Supported Calls

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

Fields

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

Field	Details
	Relationship Name ApplicationFormProduct **Refers To** ApplicationFormProduct
`Comments`	**Type** textarea **Properties** Create, Nillable, Update **Description** The evaluator's comments to the evaluation.
`Date`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the evaluation was performed.
`Decision`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifices the decision of the evaluation. Possible values are: • `Approved` • `On Hold` • `Rejected`
`EvaluatorId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The User or Group who evaluated the application form. This field is a relationship field. **Relationship Name** Evaluator **Refers To** User

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

ApplicationFormParticipant

Represents information about the application form participant. This object is available in API version 61.0 and later.

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

Supported Calls

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

Fields

Field	Details
`ApplicationFormId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The application form associated with the participant. This field is a relationship field. **Relationship Name** ApplicationForm **Relationship Type** Master-detail **Refers To** ApplicationForm (the master object)
`Comments`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The additional information about the participant.
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the application form participant is active (`true`) or not (`false`). The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort

Field	Details
	Description Timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Timestamp for when the current user last viewed this record.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the application form participant record.
`ParticipantId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The participant that's associated with the application form. This field is a polymorphic relationship field. **Relationship Name** Participant **Relationship Type** Lookup **Refers To** Group, User
`ParticipantRoleId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The default access level for a role that a participant can have in the context of a parent record. This field is a relationship field. **Relationship Name** ParticipantRole

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

Associated Objects

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

ApplicationFormParticipantChangeEvent on page 1009
Change events are available for the object.

ApplicationFormParticipantFeed on page 1013
Feed tracking is available for the object.

ApplicationFormParticipantHistory on page 1021
History is available for tracked fields of the object.

ApplicationFormProduct

Represents a junction between the application and the product requested by an applicant. This object is available in API version 59.0 and later.

Supported Calls

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

Fields

Field	Details
`ApplicantVisibleStatus`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the status of the application form product that is visible to the applicant. Possible values are: • `Application` • `Approved` • `Awaiting Signature`

Field	Details
	• `Contract Generation` • `Document Upload` • `In Review` • `Loan Booked` • `Need More Info` • `Rejected` • `Signature Complete` • `Submitted`
`ApplicationFormId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The application that's submitted for a product request. This field is a relationship field. **Relationship Name** ApplicationForm **Relationship Type** Lookup **Refers To** ApplicationForm
`DisbursementMethod`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the method of disbursement for the loan amount. Possible values are: • `Check` • `Direct Deposit`
`HasAutomaticPayment`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the applicant opted in for automatic payments (true) or not (false). The default value is `false`.

Field	Details
`HasElectronicStatement`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the customer opted in for electronic statements (true) or not (false). The default value is `false`.
`IsAtmCardRequired`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether an ATM card is required (true) or not (false). The default value is `false`.
`IsCheckbookRequired`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates if a checkbook is required (true) or not (false) for the application form product. The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`LoanType`	**Type** picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the type of loan being requested. Possible values are: • `Personal Loan`
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the Application Form Product record.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the user who created the relationship record. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`OwnershipType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of ownership for the application form product. Possible values are: • `Joint` • `Single`
`ProductId`	**Type** reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The product associated with the application form product. This field is a relationship field. **Relationship Name** Product **Relationship Type** Lookup **Refers To** Product2
`RequestedAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The amount requested as part of the application.
`RequestedTerm`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The length of the loan in months.
`Stage`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the stage of the application form product that is submitted by the applicant. Possible values are: • `Auto Approved` • `Auto Rejected` • `Awaiting Signature` • `Book to Core` • `Contract Generation` • `Customer Approved` • `Customer Rejected`

Field	Details
	• `In Review` • `Intake` • `Need More Info` • `Signature Complete` • `Submitted` • `Underwriter Approved` • `Underwriter Rejected`

Associated Objects

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

ApplicationFormproductChangeEvent on page 1009
Change events are available for the object.

ApplicationFormProductHistory on page 1021
History is available for tracked fields of the object.

ApplicationFormProductOwnerSharingRule on page 1026
Sharing rules are available for the object.

ApplicationFormProductShare on page 1029
Sharing is available for the object.

ApplicationFormProductDev

Represents a junction between an application form product and a deviation. This object is available in API version 61.0 and later. Available with Digital Lending permission set.

Supported Calls

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

Fields

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

Field	Details
	Description The Applicant who submitted the application. This field is a relationship field. **Relationship Name** Applicant **Refers To** Applicant
`ApplicationFormId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The application that's submitted for a product request. This field is a relationship field. **Relationship Name** ApplicationForm **Refers To** ApplicationForm
`ApplicationFormProductId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The product that's being applied for in the application. This field is a relationship field. **Relationship Name** ApplicationFormProduct **Relationship Type** Master-detail **Refers To** ApplicationFormProduct (the master object)
`ApprovalStatus`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The approval status of the deviation.

Field	Details
	Possible values are: • `Approved` • `Pending` • `Rejected`
`ApproverComments`	**Type** textarea **Properties** Create, Nillable, Update **Description** The approver's comments to the deviation.
`ApproverId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The individual or group who approves the deviation. This field is a polymorphic relationship field. **Relationship Name** Approver **Refers To** Group, User
`Description`	**Type** textarea **Properties** Create, Nillable, Update **Description** The description of the deviation.
`DeviationId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The deviation requested for processing the application form. This field is a relationship field. **Relationship Name** Deviation

Field	Details
	Refers To Deviation
`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.
`MinimumApproverLevel`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the minimum level of the approver who can approve the deviation. Possible values are: • `L1` • `L2` • `L3`
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the application form product deviation record.
`ReviewerComments`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The reviewer's comments after assessing the deviation. For example, comments from an Underwriter.

ApplicationFormProductFee

Represents the fees associated with an application form. This object is available in API version 61.0 and later. Available with Digital Lending permission set.

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

Supported Calls

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

Fields

Field	Details
`ApplicationFormProductId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The product that's being applied for in the application. This field is a relationship field. **Relationship Name** ApplicationFormProduct **Relationship Type** Master-detail **Refers To** ApplicationFormProduct (the master object)
`ApplicationFormProductProposalId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The product proposal with which the fee is associated.

Field	Details
	This field is a relationship field. **Relationship Name** ApplicationFormProductProposal **Relationship Type** Lookup **Refers To** ApplicationFormProductProposal
`FeeAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The fee amount that's paid by the applicant.
`FeeType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of fee paid by an applicant. Valid values are: • `Closing Fee` • `Origination Fee`
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Timestamp for when the current user last viewed this record.
`Name`	**Type** string

Field	Details
	Properties Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the application form product fee record.
`ProductFeeId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The base fee associated to the product. This field is a relationship field. **Relationship Name** ProductFee **Relationship Type** Lookup **Refers To** ProductFee

Associated Objects

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

ApplicationFormProductFeeChangeEvent on page 1009
Change events are available for the object.

ApplicationFormProductFeeFeed on page 1013
Feed tracking is available for the object.

ApplicationFormProductFeeHistory on page 1021
History is available for tracked fields of the object.

ApplicationFormProductProposal

Represents the proposal presented by the financial institution to the applicant with details of interest rate, monthly payment, validity dates, and total interest. This object is available in API version 61.0 and later. Available with Digital Lending permission set.

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

Supported Calls

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

Fields

Field	Details
`AdditionalDetails`	**Type** textarea **Properties** Create, Nillable, Update **Description** The additional information about the proposal.
`Amount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The amount of the proposal.
`ApplicationFormId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The application form associated with the proposal. This field is a relationship field. **Relationship Name** ApplicationForm **Relationship Type** Lookup **Refers To** ApplicationForm
`ApplicationFormProductId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The application form product that the proposal is associated with.

Field	Details
	This field is a relationship field. **Relationship Name** ApplicationFormProduct **Relationship Type** Master-detail **Refers To** ApplicationFormProduct (the master object)
`InterestRate`	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** The interest rate for the product.
`InterestRateType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of interest rate for the product. Valid values are: • `Fixed` • `Variable`
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the offer is active (`true`) or not (`false`). The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Timestamp for when the current user last viewed a record related to this record.

Field	Details
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Timestamp for when the current user last viewed this record.
`MonthlyPayment`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The details of the monthly payment.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of theproduct proposal record of an application form.
`SelectedBy`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies who selected the proposal. Valid values are: • `Applicant` • `Applicant And Lender` • `Lender`
`Stage`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The stage of the proposal. alid values are: • `Final`

Field	Details
	• `Pre-Qual`
`Term`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The term length in months.
`TotalInterest`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The total interest.
`ValidEndDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The end date of the proposal.
`ValidStartDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The start date of the proposal.

ApplicationFormSellerItem

Represents a junction between an application form and a seller product. This object is available in API version 61.0 and later. Available with Digital Lending permission set.

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

Supported Calls

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

Fields

Field	Details
ApplicationFormProductId	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The product that's being applied for in the application. For example, home loan or auto loan. This field is a relationship field. **Relationship Name** ApplicationFormProduct **Relationship Type** Master-detail **Refers To** ApplicationFormProduct (the master object)
BuiltUpArea	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The built-up area of the property.
BuiltUpAreaUnit	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The unit of measure for the built up area.
ConstructionStage	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The construction stage of the property.
EngineNumber	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The engine number of the vehicle.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Timestamp for when the current user last viewed this record.
`Make`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The make of the seller item.
`Mileage`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The mileage of the seller item.
`Model`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The model of the seller item.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort

Field	Details
	Description The seller item name.
`PartyFinancialAssetId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The iformation about the financial asset owned by an individual or account. This field is a relationship field. **Relationship Name** PartyFinancialAsset **Relationship Type** Lookup **Refers To** PartyFinancialAsset
`Price`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The price of the product.
`PropertyAddress`	**Type** address **Properties** Filter, Nillable **Description** The address of the property.
`PropertyAge`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The age of the property.
`PropertyCity`	**Type** string

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The city of the property.
`PropertyCountry`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The country of the property.
`PropertyGeocodeAccuracy`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The geocode of the property. Valid values are: • `Address` • `Block` • `City` • `County` • `ExtendedZip` • `NearAddress` • `Neighborhood` • `State` • `Street` • `Unknown` • `Zip`
`PropertyLatitude`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The latitude of the property.
`PropertyLongitude`	**Type** double

Field	Details
	Properties Create, Filter, Nillable, Sort, Update **Description** The longitude of the property.
`PropertyPostalCode`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The postal code of the property.
`PropertyState`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The state of the property.
`PropertyStreet`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The street of the property
`PropertyUnitIdentifier`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The unit identifier of the property.
`ReferenceObjectId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The product that the applicant has shown interest in buying. For example, a home or vehicle. This field is a polymorphic relationship field.

Field	Details
	Relationship Name ReferenceObject **Relationship Type** Lookup **Refers To** Asset, Product2, VendorProject
`ScheduledDeliveryDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The delivery date of the product to the applicant.
`SellerId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The seller ID of the seller item. This field is a relationship field. **Relationship Name** Seller **Relationship Type** Lookup **Refers To** Account
`Trim`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The trim type of the seller item.
`Type`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The type of product.

Field	Details
	Valid values are: • `Bus` • `Vehicle`
`VehicleIdentificationNumber`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The unique identifier for the vehicle.
`VehicleRegistrationNumber`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The registration number of the vehicle.
`Year`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The manufacture date of the seller item.

Associated Objects

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

ApplicationFormSellerItemChangeEvent on page 1009
Change events are available for the object.

ApplicationFormSellerItemFeed on page 1013
Feed tracking is available for the object.

ApplicationFormSellerItemHistory on page 1021
History is available for tracked fields of the object.

ApplicationFormTerm

Represents the terms associated with an application form for a loan or a lease. This object is available in API version 62.0 and later. Available with Digital Lending permission set.

Supported Calls

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

Fields

Field	Details
`ApplicationFormId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** A form that captures the applicant requirements for a financial product application. This field is a relationship field. **Relationship Name** ApplicationForm **Relationship Type** Master-detail **Refers To** ApplicationForm (the master object)
`EffectiveEndDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date till which a term is related to an application form.
`EffectiveStartDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date from which a term is related to an application form.
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the application form term is active (true), or not (false).

Field	Details
	The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The date the associated location was last modified.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The date the associated location was last viewed.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Name of the application form term.
`ReferenceRecordId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The product or proposal related to an application form term. This field is a polymorphic relationship field. **Relationship Name** ReferenceRecord **Refers To** ApplicationFormProduct, ApplicationFormProductProposal
`TermDetail`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description A detailed description about the term related to an application form that's referenced during the decisioning process.
`TermId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** A term related to an application form that represents conditions offered to the customer. This field is a relationship field. **Relationship Name** Term **Refers To** Term

Appraisal

Represents the appraisal for one or more items. This object is available in API version 63.0 and later.

Supported Calls

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

Special Access Rules

Automotive and Appraisal Management must be enabled.

Fields

Field	Details
`AppraisedById`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The contact or the user who performs an appraisal. This field is a polymorphic relationship field.

Field	Details
	Relationship Name AppraisedBy **Refers To** Contact, User
`Comment`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The dealer or customer provides a comment for the appraisal, such as instructions or context.
`Fee`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The fee for the appraisal.
`FinalAppraisalValue`	**Type** currency **Properties** Filter, Nillable, Sort **Description** The final appraisal value that sums up the total item final value and the total adjustment value of an appraisal. This field is a calculated field.
`InitiatedById`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The account, contact, or user who initiates an appraisal. This field is a polymorphic relationship field. **Relationship Name** InitiatedBy **Refers To** Account, Contact, User

Field	Details
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the appraisal is active (true) or not (false). The default value is `false`.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The owner of the appraisal record. This field is a polymorphic relationship field. **Relationship Name** Owner **Refers To** Group, User
`PurposeType`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies the purpose of the appraisal, such as sales, trade-in, or valuation of an asset. Possible values are: • `Sale` • `Trade-In`
`ReferenceRecordId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The record of an object, such as lead, account, opportunity, or application form product that serves as the context for the appraisal. This field is a polymorphic relationship field. **Relationship Name** ReferenceRecord

Field	Details
	Refers To Account, Case, Lead, Opportunity
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the status of the appraisal.
`TotalAdjustmentValue`	**Type** currency **Properties** Filter, Nillable, Sort **Description** The cumulative value based on all appraisal adjustments that refer to an appraisal. This field is a calculated field.
`TotalItemFinalValue`	**Type** currency **Properties** Filter, Nillable, Sort **Description** The cumulative value based on all the final values of all items related to the appraisal. This field is a calculated field.
`UsageType`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** The usage type of the appraisal. Possible values are: • `Automotive`
`ValidityEndDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date until which the appraisal is valid.

AppraisalAdjustment

Represents an adjustment for the appraisal or an appraisal item. This object is available in API version 63.0 and later.

Supported Calls

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

Fields

Field	Details
`AdjustedById`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The contact or the user that performs the adjustment. This field is a polymorphic relationship field. **Relationship Name** AdjustedBy **Refers To** Contact, User
`AdjustmentValue`	**Type** currency **Properties** Create, Filter, Sort, Update **Description** The positive or negative value of the appraisal adjustment.
`AppraisalId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The appraisal record for which an adjustment is made. This field is a relationship field. **Relationship Name** Appraisal **Relationship Type** Master-detail

Field	Details
	Refers To Appraisal (the master object)
AppraisalItemId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The appraisal item record for which an adjustment is made This field is a relationship field. **Relationship Name** AppraisalItem **Refers To** AppraisalItem
Description	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description of the appraisal adjustment.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp indicating the last time the current user viewed a related record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp indicating when the current user last viewed this record.
Name	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update

Field	Details
	Description The name of the appraisal adjustment.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the status of the adjustment. Default values are: • `Approved` • `InReview`—Under Review • `Rejected`
`Type`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies the type of the appraisal adjustment. Possible values are: • `Negative` • `Positive`

AppraisalItem

Represents an item that is appraised, such as a vehicle or an asset. This object is available in API version 63.0 and later.

Supported Calls

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

Fields

Field	Details
`Address`	**Type** address

Field	Details
	Properties Filter, Nillable **Description** The address of the appraisal item.
`AppraisalId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The appraisal associated with the appraisal item. This field is a relationship field. **Relationship Name** Appraisal **Relationship Type** Master-detail **Refers To** Appraisal (the master object)
`AppraisedById`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The contact or the user that appraises the item. This field is a polymorphic relationship field. **Relationship Name** AppraisedBy **Refers To** Contact, User
`ConditionType`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies the condition of the item that is appraised. Possible values are: • `Best` • `Better`

Field	Details
	• `Good`
`CustomerAskingValue`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The value of the item proposed by the customer for the appraisal.
`ExteriorColor`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The exterior color of the item that is appraised. Possible values are: • `Black` • `Blue`
`FinalValue`	**Type** currency **Properties** Filter, Nillable, Sort **Description** The final value of the appraisal item. This field is a calculated field.
`IdentificationNumber`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The identification number of the item that is appraised.
`InitialValue`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The preliminary value for the appraisal based on provider estimates.

Field	Details
`InstallDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date that the item is installed.
`IsAddOnIncluded`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the item includes an add on (true) or not (false). The default value is `false`.
`IsCustomized`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the item is customized (true) or not (false). The default value is `false`.
`IsHandoverComplete`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the handover is complete for the appraisal item (true) or not (false). The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime

Field	Details
	Properties Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record.
`LicensePlateNumber`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The license plate number of the vehicle that is appraised.
`MakeName`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the make name of the item that is appraised. Possible values are: • `Make 1` • `Make 2` • `Make 3` • `Maruti`
`ManufacturedDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date that the item is manufactured.
`ModelName`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the model of the item that is appraised. Possible values are: • `Maruti Baleno` • `Model 1`

Field	Details
	• Model 2 • Model 3 • Model 4 • Model 5
ModelYear	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the year when the model of the item is first launched. Possible values are: • 2023 • 2024 • 2025
OwnershipType	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the type of ownership of the item. Possible values are: • Joint • Primary
PurchaseDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date that the item is purchased.
ReferenceRecordId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The existing record of the item related to the appraisal as referenced in the application, such as an Asset or Vehicle record with a serial number or a vehicle identification number.

Field	Details
	This field is a polymorphic relationship field. **Relationship Name** ReferenceRecord **Refers To** Asset, Vehicle
`RegistrationState`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The state where the item that is appraised is registered. Possible values are: • `Telangana`
`RegistrationZipCode`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ZIP code of the item that is appraised.
`TotalAdjustmentValue`	**Type** currency **Properties** Filter, Nillable, Sort **Description** The cumulative value based on all appraisal adjustments that refer to this appraisal item.
`Trim`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The trim levels supported by the item that is appraised. Possible values are: • `Baleno Alpha` • `Baleno Delta` • `Trim 1` • `Trim 2`

Field	Details
	• Trim 3 • Trim 4 • Trim 5 • Trim 6 • Trim 7 • Trim 8 • Trim 9
Type	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies the type of item that forms the basis for the appraisal. Possible values are: • Asset • Vehicle
Usage	**Type** double **Properties** Create, Filter, Sort, Update **Description** The usage of the item that is appraised.
UsageUnitOfMeasureId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The unit of measure for the usage. This field is a relationship field. **Relationship Name** UsageUnitOfMeasure **Refers To** UnitOfMeasure
WarrantyEndDate	**Type** date

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The end date of the warranty of the item that is appraised.

AppraisalItemProviderVal

Represents a valuation of the item that is appraised. This object is available in API version 63.0 and later.

Supported Calls

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

Fields

Field	Details
`AppraisalItemId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The appraisal item that's associated with the appraisal source valuation. This field is a relationship field. **Relationship Name** AppraisalItem **Relationship Type** Master-detail **Refers To** AppraisalItem (the master object)
`AverageConditionValue`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The value of the item if it's average condition.

Field	Details
CleanConditionValue	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The value of the item if it's in clean condition.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record.
Name	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The autopopulated name of Appraisal Item Provider Valuation record.
ProviderName	**Type** picklist **Properties** Create, Filter, Group, Sort, Update **Description** The name of the provider that gives the valuation of the item.
RoughConditionValue	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The value of the item if it's in rough condition.

Field	Details
`ValuationDateTime`	**Type** dateTime **Properties** Create, Filter, Sort, Update **Description** The date and time when the source gives the valuation of the item.

AuthFormRequestRecord

Junction between an Authorization Request and the Salesforce record that is being authorized. For example. the actual financial Salesforce records shared with third parties or any Salesforce record being shared as a result of the consent request. 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
`InfoAuthRequestFormId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Link to the Information Authorization Request Form related to this record. This is a relationship field. **Relationship Name** InfoAuthRequestForm **Relationship Type** Lookup **Refers To** InfoAuthRequestForm
`InfoAuthorizationRequestId`	**Type** reference **Properties** Create, Filter, Group, Sort

Field	Details
	Description Link to the Information Authorization Request related to this record. This is a relationship field. **Relationship Name** InfoAuthorizationRequest **Relationship Type** Lookup **Refers To** InfoAuthorizationRequest
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the authorization form request record.
`RelatedRecordId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** Link to the Salesforce Record related to this record. This is a relationship field. **Relationship Name** RelatedRecord

Field	Details
	Relationship Type Lookup **Refers To** Account, BusinessMilestone, Campaign, Case, Claim, ClaimItem, Contact, Contract, DocumentChecklistItem, FinServ__AccountAccountRelation__c, FinServ__Alert__c, FinServ__AssetsAndLiabilities__c, FinServ__B2CLeadCompanyNameConfig__c, FinServ__BillingStatement__c, FinServ__Card__c, FinServ__ChargesAndFees__c, FinServ__ContactContactRelation__c, FinServ__Education__c, FinServ__Employment__c, FinServ__FinancialAccountRole__c, FinServ__FinancialAccountTransaction__c, FinServ__FinancialAccount__c, FinServ__FinancialGoal__c, FinServ__FinancialHolding__c, FinServ__IdentificationDocument__c, FinServ__IndustriesAppConfig__c, FinServ__IndustriesSettings__c, FinServ__LifeEvent__c, FinServ__NextLastInteractionSettings__c, FinServ__PolicyPaymentMethod__c, FinServ__ReciprocalRole__c, FinServ__Record_Rollup_Configuration__c, FinServ__Revenue__c, FinServ__RollupByLookupConfig__c, FinServ__RollupByLookupFilterCriteria__c, FinServ__Securities__c, FinServ__UsePersonAccount__c, FinServ__WealthAppConfig__c, FinServ__individualExcludedFields__c, InsurancePolicyCoverage, Lead, Opportunity, OpportunityLineItem, Order, OrderItem, PersonLifeEvent, Quote, QuoteLineItem, ResidentialLoanApplication, Task

AuthorizedInsuranceLine

Represents the insurance lines that an insurance company is authorized to sell. This object is available in API version 48.0 and later.

Supported Calls

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

Fields

Field	Details
`Country`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The country where the insurance company can sell this insurance line.

Field	Details
`InsuranceLine`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The insurance line that the insurance company is authorized to sell. Possible values are: • `Disability` • `Life` • `Property`
`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.
`LegalEntityId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Legal entity ID of the insurance company that this authorization has been issued to.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** An auto-number identifier for the insurance line.

Field	Details
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the record owner.

Associated Objects

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

AuthorizedInsuranceLineChangeEvent on page 1009
Change events are available for the object in API version 62.0 and later.

AuthorizedInsuranceLineFeed
Feed tracking is available for the object.

AuthorizedInsuranceLineHistory
History is available for tracked fields of the object.

AuthorizedInsuranceLineSharingRule
Sharing rules are available for the object.

AuthorizedInsuranceLineShare
Sharing is available for the object.

Award

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

Supported Calls

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

Fields

Field	Details
AccountId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the organization receiving the award.

Field	Details
	This field is a relationship field. **Relationship Name** Account **Relationship Type** Lookup **Refers To** Account
`AwardDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** Date award was received.
`AwardedBy`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Name of the issuing organization.
`ContactId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Person who received the award and is listed as a contact. This field is a relationship field. **Relationship Name** Contact **Relationship Type** Lookup **Refers To** Contact
HealthcareProviderId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Healthcare provider that this award is associated with. This field is a relationship field. **Relationship Name** HealthcareProvider **Relationship Type** Lookup **Refers To** HealthcareProvider
`Identifier`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Issuing organization's identifier for the award recipient.
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the record is active.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The 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

Field	Details
	Properties Create, Filter, Group, Sort, Update **Description** Award name.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the user who owns this record. This field is a relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Award status. Example values: • Inactive • Revoked • Draft • Verified
`UserId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the person who received the award and is listed as a user. This field is a relationship field. **Relationship Name** User

Field	Details
	Relationship Type Lookup **Refers To** User
`VerificationStatus`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Current award status. Example values: • Authorized • Pending • Unverified
`VerifiedDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** Award was validated on this date.

Associated Objects

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

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

AwardFeed
Feed tracking is available for the object.

AwardHistory
History is available for tracked fields of the object.

AwardOwnerSharingRule
Sharing rules are available for the object.

AwardShare
Sharing is available for the object.

Banker

Represents a business unit member who is assigned the banker role for a branch unit. This object is available in API version 51.0 and later.

Supported Calls

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

Fields

Field	Details
`CurrentBranchId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the branch associated with this banker's current work.
`CurrentBranchStartTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time when this banker made this branch assignment current.
`Description`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Information about the assignment of this person to the banker role.
`JobCode`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** An identifier that relates the banker to an external system.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.

Field	Details
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description**
`Level`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Sort, Update **Description** Specifies the organizational level of the banker. Possible values are: • `1` • `2` • `3` • `4` • `5` • `6` • `7` • `8` • `9` • `10` The default value is '1'.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of this assignment of a banker to a branch.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the user who owns this record.

Field	Details
ServiceResourceId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of a service resource that lets this user be assigned to service territories.
UserOrContactId	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The contact or user associated with the banker.

Associated Objects

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

bankerChangeEvent on page 1009
Change events are available for the object.

BankerFeed on page 1013
Feed tracking is available for the object.

BankerHistory on page 1021
History is available for tracked fields of the object.

BankerShare on page 1029
Sharing is available for the object.

BranchUnit

Represents details about a branch of an organization. This object is available in API version 51.0 and later.

Supported Calls

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

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The ID of an account that contains additional information about a branch. The value must be unique within this organization.
`BranchCode`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** An identifier that relates this branch to an external system.
`BranchManagerId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of a user who is the manager or main point of contact for the branch unit.
`EndDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date the branch most recently stopped being active.
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the branch is currently active and can be used for banker assignments and automatic associations. The default value is 'false'.
`LastReferencedDate`	**Type** dateTime

Field	Details
	Properties Filter, Nillable, Sort **Description** The most recent date when a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date when a user viewed this record.
`LocationId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of a location where the branch does business.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description**
`OperatingHoursId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of an operating hours record that specifies the hours when the branch is open for normal business operations.
`OperationalState`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the operational readiness of a branch.
`OwnerId`	**Type** reference

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the user who owns this record.
`ParentBranchUnitId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of this branch's parent branch unit, if it has one.
`ServiceTerritoryId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of a service territory that corresponds to this branch unit.
`StartDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date the branch most recently became active.
`Type`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the branch interaction type with customers. Possible values are: • `Physical`—The branch only operates at a physical location • `PhysicalAndVirtual`—Physical and Virtual • `Virtual`—The branch only operates as a virtual entity

Associated Objects

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

BranchUnitChangeEvent on page 1009
Change events are available for the object.

BranchUnitFeed on page 1013
Feed tracking is available for the object.

BranchUnitHistory on page 1021
History is available for tracked fields of the object.

BranchUnitOwnerSharingRule on page 1026
Sharing rules are available for the object.

BranchUnitShare on page 1029
Sharing is available for the object.

BranchUnitBusinessMember

Represents a user or contact who can perform a specific role for a branch. This object is available in API version 51.0 and later.

Supported Calls

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

Fields

Field	Details
`BranchUnitId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The ID of the branch unit associated with this assignment.
`BusinessUnitMemberId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** A user or contact with a predefined role that can be performed at this branch.
`EndDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The date that this person stopped fulfilling this role for this branch unit.
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether this role assignment can be used for this branch unit. The default value is 'false'.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date when a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date when a user viewed this record.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of this branch unit business member assignment.
`ServiceTerritoryMemberId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of a service territory member record for the same user who can be assigned to service appointments in a service territory.
`StartDate`	**Type** date

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The date that this person was assigned this role for this branch unit.

Associated Objects

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

BranchUnitBusinessMemberChangeEvent on page 1009
Change events are available for the object.

BranchUnitBusinessMemberFeed on page 1013
Feed tracking is available for the object.

BranchUnitBusinessMemberHistory on page 1021
History is available for tracked fields of the object.

BranchUnitCustomer

Represents a customer account that is assigned to or attributed to a branch unit. This object is available in API version 5`.0 and later.

Supported Calls

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

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The ID of a customer account associated with the branch.
`AssociationLevel`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	Description Indicates the branch's level of responsibility for managing the customer account. Possible values are: • `Primary` • `Secondary` The default value is 'Primary'.
`BranchUnitId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The branch that is handling the associated customer account.
`LastInteractionDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the customer account was associated with the branch.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date when a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date when a user viewed this record.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the branch unit customer relationship.

Associated Objects

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

BranchUnitCustomerChangeEvent on page 1009
Change events are available for the object.

BranchUnitCustomerFeed on page 1013
Feed tracking is available for the object.

BranchUnitCustomerHistory on page 1021
History is available for tracked fields of the object.

BranchUnitRelatedRecord

Represents a record such as a case or account that is associated with or attributed to a branch unit. This object is available in API version 51.0 and later.

Supported Calls

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

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of a customer account associated with the related record.
`BranchUnitId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The ID of the branch unit that's associated with the related record.
`BusinessUnitMemberId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The ID of the business unit member who was active at the branch when this association was made.
`Comment`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Comments about the relationship between the related record and the branch.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date when a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date when a user viewed this record.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the branch unit related record association.
`Reason`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies a reason or rationale for associating the record with the branch.
`RelatedObjectName`	**Type** picklist

Field	Details
	Properties Filter, Group, Restricted picklist, Sort **Description** The object name or record type of the related record. Possible values are: • `Account` • `Case` • `Lead` (Lead and Referral) • `Opportunity` • `Contact` • `InteractionSummary`
`RelatedRecordAssocCriteriaId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The ID of the association criteria that triggered the creation of this record.
`RelatedRecordId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The ID of the related record.

Associated Objects

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

branchunitrelatedrecordChangeEvent on page 1009
Change events are available for the object.

BrokerOfRecord

Represents a legal authority for the brokerage to act on behalf of their clients with insurance carriers. This object is available in API version 61 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** The account of the client that's associated with the broker of 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** If multiple currencies are enabled, this field contains the currency ISO code associated with the record. Possible values are: • `EUR`—Euro • `GBP`—British Pound • `USD`—U.S. Dollar The default value is `USD`.
`EffectiveDate`	**Type** date **Properties** Create, Filter, Group, Sort, Update **Description** The date when the broker of record becomes effective.
`EndDate`	**Type** date

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The date when the broker of record ends.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`LineOfBusiness`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies the type of business supported by the broker of record. Possible values are: • `Employee Benefits` • `Property & Casualty`
`LineOfCoverage`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the type of insurance coverage offered by the broker of record.
`LostOpportunityId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The lost opportunity to identify the expected revenue loss. This field is a relationship field. **Relationship Name** LostOpportunity **Refers To** Opportunity
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the broker of record.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the record owner. This field is a polymorphic relationship field. **Relationship Name** Owner **Refers To** Group, User
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The current status of the broker of record. Possible values are: • `In Effect` • `Lost`
`WonOpportunityId`	**Type** reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The won opportunity that started the broker of record relationship. This field is a relationship field. **Relationship Name** WonOpportunity **Refers To** Opportunity

Associated Objects

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

BrokerOfRecordChangeEvent on page 1009
Change events are available for the object in API version 62.0 and later.

BrokerOfRecordHistory on page 1021
History is available for tracked fields of the object.

BrokerOfRecordOwnerSharingRule on page 1026
Sharing rules are available for the object.

BrokerOfRecordShare on page 1029
Sharing is available for the object.

BusinessLicense

Represents the licenses of a party role like healthcare provider or producer.

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

Field	Details
	Description ID of the organization holding the license.
`ContactId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the person who holds the license and is listed as a contact.
`Identifier`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** Issuer's ID for the licensee.
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the license is active.
`Issuer`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** License issuer's name.
`JurisdictionCountry`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Country where license is valid.
`JurisdictionOther`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Name of other jurisdiction.
`JurisdictionState`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** State where license is valid.
`JurisdictionType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Jurisdiction for the license. Example values: • State • County • Province • Country
`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.
`LicenseClass`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The class that the distributor's license belongs to. This field is available from API version 48.0 and later. Possible values are: • `Insurance Producer` • `Managing General Agent` • `Public Adjuster`
`LineOfAuthority`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The line of authority that the distributor is licensed for. This field is available from API version 48.0 and later. Possible values are: • `Accident & Health or Sickness` • `Casualty` • `Property`
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Name of the business or professional license.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the user who owns this record.
`PeriodEnd`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** License's expiration date.

Field	Details
`PeriodStart`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** License's effective start date.
`ResidenceStatus`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Residence status of the producer. This field is available from API version 48.0 and later. Possible values are: • `Non-resident` • `Resident`
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Current status of the license. Example values: • Inactive • Revoked • Draft • Verified
`UserId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Person who holds the license and is listed as a user.
`VerificationStatus`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Current status for the license. Example values: • Authorized • Pending • Unverified
`VerifiedDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** License was validated on this date.

Associated Objects

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

BusinessLicenseChangeEvent
Change event tracking is available for the object.

BusinessLicenseFeed
Feed tracking is available for the object.

BusinessLicenseHistory
History is available for tracked fields of the object.

BusinessLicenseOwnerSharingRule
Sharing rules are available for the object.

BusinessLicenseShare
Sharing is available for the object.

BusinessMilestone

Represents the milestones of a business, such as acquisition, market listing, and expansion. This object is available in API version 47.0 and later.

Supported Calls

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

Fields

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

Field	Details
	Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`MilestoneDate`	**Type** dateTime **Properties** Create, Filter, Sort, Update **Description** The date on which the business milestone occurred.
`MilestoneDescription`	**Type** textarea **Properties** Create, Nillable, Update **Description** The description of the business milestone.
`MilestoneSiteId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The location where the business milestone occurred. For example, the location where a business deal was won.
`MilestoneType`	**Type** picklist **Properties** Create, Filter, Group, Sort **Description** The type of the business milestone. Possible values are: • `Award` • `Bankruptcy` • `Executive Change` • `Expansion` • `Incorporation` • `Market Listing` • `Merger & Acquisition` • `New Funding`

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

Associated Objects

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

BusinessMilestoneChangeEvent on page 1009
Change events are available for the object.

BusinessMilestoneFeed
Feed tracking is available for the object.

BusinessMilestoneHistory
History is available for tracked fields of the object.

BusinessProfile

Represents the insurance-related attributes for the insured business. This object is available in API version 47.0 and later.

Supported Calls

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

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The ID of the account related to this business profile.
`ConsecWorkersCompCoverage`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The number of consecutive years for which the insured business had workers' compensation coverage.
`CreditTypesUsed`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The credit types used by the insured business.

Field	Details
HasDishonoredPolicies	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the business has canceled policies, has not renewed policies, or has been denied policies in the past.
HasSufferedBankruptcy	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the business has reported any bankruptcies in the past.
HasUncorrectedSafetyViolations	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the business has any uncorrected safety violations.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
Name	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort

Field	Details
	Description An auto-generated number assigned to this record.
`SourceSystem`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the source system this record was obtained from.
`SourceSystemIdentifier`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** The ID of this record in the source system. This field is unique within your organization.
`WorkersCompClaims`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The number of workers' compensation claims raised.
`WorkersCompMedicalClaims`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The number of workers' compensation medical claims raised.

Associated Objects

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

BusinessProfileChangeEvent **on page 1009**
Change events are available for the object in API version 62.0 and later.

BusinessProfileFeed
Feed tracking is available for the object.

BusinessProfileHistory
History is available for tracked fields of the object.

BusinessProfileOwnerSharingRule on page 1026
Sharing rules are available for the object.

BusinessProfileShare on page 1029
Sharing is available for the object.

CaseGatewayRequest

Holds the JSON output from the Financial Services Cloud flows and serves as an endpoint for integration with backend systems. It records the data interchange between the integrated systems.

Supported Calls

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

Fields

Field	Details
`CaseId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The ID of the associated case.
`IntegrationPayload`	**Type** textarea **Properties** Create, Update **Description** The data payload for the integration, in JSON format. Here's an example. `{ "FlowName": "", "ServiceRequestNumber": "", "ServiceRequestId": "", "AccountId": "", "FinancialAccountId": "" }`
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, Sort

Field	Details
	Description An auto-generated string assigned to this record.
`SourceSystem`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the source system this record was obtained from.
`SourceSystemIdentifier`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of this record in the source system.
`StatusCode`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The status code of the transmission.
`StatusMessage`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The status of the transmission.

Claim

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

Supported Calls

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

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the account related to the claim.
`ActualAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The actual amount that was billed for the repair of damages.
`ApprovedAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The amount that was approved for the repair of damages based on an agent's inspection.
`AssessmentDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date on which the claim was officially assessed.
`CaseId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the case that created the claim.
`ClaimReason`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The reason for initiating the claim.
`ClaimReasonType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The category that the claim reason belongs to. For example, natural disaster, accident.
`ClaimType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of the claim. For example, home, auto, annuity, life, or workers' compensation.
`EstimatedAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The estimated cost of damages given by the owner or the repair shop.
`FinalizedDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date on which the claim was marked resolved, with claim status as approved or rejected.
`FinancialAuthorityStatus`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the financial authority status of the claim. Possible values are: • `Authority Approved` • `Authority Denied` • `No Authority Pending`

Field	Details
	• `Pending Authority`
`FnolChannel`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The channel through which the loss was reported. Possible values are: • `Chatbot` • `Mobile` • `Phone` • `Web`
`IncidentId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The incident to which a claim pertains. For example, a claim associated with a catastrophe. This field is available in API version 54.0 and later. This is a relationship field. **Relationship Name** Incident **Relationship Type** Lookup **Refers To** Incident
`IncidentSite`	**Type** address **Properties** Filter, Nillable **Description** The place where the accident took place. This is a compound field of type Address and combines these fields: IncidentSiteCity, IncidentSiteCountry, IncidentSiteGeocodeAccuracy, IncidentSiteLatitude, IncidentSiteLongitude, IncidentSitePostalCode, IncidentSiteState, and IncidentSiteStreet. For more information, see Address Compound Fields.

Field	Details
InitiationDate	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date on which the claim was initiated.
InsuredAssetId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the asset that is insured.
IsAuthoritiesNotified	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the authorities have been informed about the accident. The default value is False.
IsClosed	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort **Description** Indicates whether the claim has been closed. The default value is False.
IsDrivable	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the vehicle is drivable after the accident. The default value is False.
IsInhabitable	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	Description Indicates whether the property is inhabitable after the accident. The default value is False.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`LossDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date on which the accident took place.
`LossType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of the loss for which the claim was initiated. For example, partial loss, repair, replacement.
`Name`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The claim number in the claims management system.
`OwnerId`	**Type** reference

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the record owner.
`PolicyNumberId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the parent insurance policy related to the claim.
`ProductId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The product that's associated with the claim. This field is available from API version 65.0 and later.
`RenewalChannel`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The channel through which the insurance policy associated with this claim was renewed. This field is deprecated in API version 48.0 and will be removed in API version 52 (the Summer '21 release). Possible values are: • `Chatbot` • `Mobile` • `Phone` • `Web`
`RepairShop`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the repair shop where the damaged vehicle was repaired.

Field	Details
`RepairShopLocation`	**Type** textarea **Properties** Create, Nillable, Update **Description** The location of the repair shop where the damaged vehicle was repaired.
`ReportDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The timestamp for when the accident report was filled out.
`ReportNumber`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** The number of the accident report.
`ReportingAuthority`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the authority who filled out the accident report.
`Severity`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The severity of the claim. For example, high, medium, or low.
`SourceSystem`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the system this record was obtained from.

Field	Details
SourceSystemIdentifier	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of this record in the source system.
Status	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Sort, Update **Description** The status of the claim.
Summary	**Type** textarea **Properties** Create, Nillable, Update **Description** The description of the claim.
VisitDate	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The timestamp for when the agent visited the site of the accident or the place where the vehicle was moved after the accident.
VisitSite	**Type** textarea **Properties** Create, Nillable, Update **Description** The site that the agent visited.

Associated Objects

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

ClaimChangeEvent on page 1009
Change events are available for the object in API version 63.0 and later.

ClaimAttribute

Represents attributes for a claim. This object is available in API version 65.0 and later.

Supported Calls

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

Fields

Field	Details
`AttributeDefinitionId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The attribute definition associated with the claim attribute.
`AttributeName`	**Type** string **Properties** Filter, Group, idLookup, Nillable, Sort **Description** The name of the attribute.
`AttributePicklistValueId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The attribute picklist value associated with the claim attribute.
`AttributeValue`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The value of the attribute.
`ClaimId`	**Type** reference

Field	Details
	Properties Create, Filter, Group, Sort **Description** The claim associated with the claim attribute.

Claim Case

A junction object that associates the Claim object with the Case object. You see this object only if you have enabled the Use Many-to-Many Relationships org pref.

Supported Calls

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

Fields

Field	Details
`CaseId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The ID of the case that was opened to handle this claim.
`ClaimId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The ID of the claim.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.

Field	Details
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
Name	**Type** string **Properties** Autonumber, Defaulted on create, Filter, Sort **Description** An auto-generated number assigned to this record.
SourceSystem	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the source system this record was obtained from.
SourceSystemIdentifier	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of this record in the source system.

Associated Objects

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

ClaimCaseChangeEvent **on page 1009**
Change events are available for the object in API version 63.0 and later.

ClaimCaseFeed
Feed tracking is available for the object.

ClaimCaseHistory
History is available for tracked fields of the object.

ClaimCoverage

Represents the insurance policy coverage for a claim. This object stores the information about financial activities related to the claim, including payouts and reserves. This object is available in API version 51.0 and later.

Supported Calls

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

Fields

Field	Details
`ClaimId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The claim associated with this claim coverage.
`ClaimItemId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The claim item associated with the claim coverage.
`ClaimParticipantId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The claim participant associated with this claim coverage.
`Description`	**Type** textarea **Properties** Create, Nillable, Update **Description** The description of the coverage for the claim.

Field	Details
`ExpenseReserveAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The amount of expense reserve held for this claim coverage.
`InsurancePolicyAssetId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The insurance policy asset associated with this claim coverage.
`InsurancePolicyCoverageId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The insurance policy coverage associated with the claim coverage.
`InsurancePolicyParticipantId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The insurance policy participant associated with the claim coverage.
`InternalReserveMode`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies the rule for determining the loss reserve amount and expense reserve amount for the coverage of the claim. If the rule is Coverage Reserve, the reserve amounts are stored in the Loss Reserve and Expense Reserve fields of the Claim Coverage object. If the rule is Reserve Worksheet, the reserve amounts are stored in the Claim Coverage Reserve object. The values are added to and displayed in the Loss Reserve and Expense Reserve fields of the Claim Coverage object. Possible values are: • `CoverageReserve`—Coverage Reserve

Field	Details
	• `ReserveWorksheet`—Reserve Worksheet
`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.
`LossReserveAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The amount of loss reserve held for a claim coverage.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the claim coverage.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the record owner.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Specifies the status of a claim coverage. Possible values are: • `Closed` • `Denied` • `Open`

Associated Objects

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

ClaimCoverageChangeEvent on page 1009
Change events are available for the object in API version 63.0 and later.

ClaimCoveragePaymentDetail

Represents the claim coverage amount that must be paid to a recipient for a loss or an expense payment. 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
`AdjustedAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The amount the insurance carrier intends to pay for a loss or benefit after making adjustments for deductibles, copay, or coinsurance.
`BenefitName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The name of the benefit associated with the claim coverage payment detail.
`ClaimCoverageId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The Claim Coverage associated with the Claim Coverage Payment Detail. This field is a relationship field. **Relationship Name** ClaimCoverage **Relationship Type** Lookup **Refers To** ClaimCoverage
`ClaimCoverageReserveDetailId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The Claim Coverage Reserve Detail associated with the Claim Coverage Payment Detail. This field is a relationship field. **Relationship Name** ClaimCoverageReserveDetail **Relationship Type** Lookup **Refers To** ClaimCoverageReserveDetail
`ClaimParticipantRecipientId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The Claim Participant Recipient associated with the Claim Coverage Payment Detail. This field is a relationship field. **Relationship Name** ClaimParticipantRecipient

Field	Details
	Relationship Type Lookup **Refers To** ClaimParticipant
`ClaimPaymentSummaryId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The Claim Payment Summary issued to the Claim Participant Recipient for the Claim Coverage Payment Detail. This field is a relationship field. **Relationship Name** ClaimPaymentSummary **Relationship Type** Lookup **Refers To** ClaimPaymentSummary
`ClaimPayoutPlanId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The Claim Payout Plan associated with the Claim Coverage Payment Detail. This field is a relationship field. **Relationship Name** ClaimPayoutPlan **Relationship Type** Lookup **Refers To** ClaimPayoutPlan
`ClaimedAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The amount claimed by the claimant or service provider to pay for a loss or benefit.

Field	Details
`CurrencyIsoCode`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** If multiple currencies are enabled, this field contains the currency ISO code associated with the record. Possible values are: • `AED`—UAE Dirham • `CAD`—Canadian Dollar • `GBP`—British Pound • `JPY`—Japanese Yen • `USD`—U.S. Dollar The default value is `USD`.
`Description`	**Type** textarea **Properties** Create, Nillable, Update **Description** The description of the claim coverage.
`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.
`LimitUnitCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The unit count that the payment detail represents.
`LimitUnitOfMeasure`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the unit of measure that the payment detail represents. Possible values are: • `Days` • `Visits`
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the claim coverage payment detail.
`PaymentRequestLineId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The Payment Request Line associated with the Claim Coverage Payment Detail. This field is a relationship field. **Relationship Name** PaymentRequestLine **Relationship Type** Lookup **Refers To** PaymentRequestLine
`PaymentStatus`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the payment status of claim coverage payment detail. This field is available from API version 65.0 and later.

Field	Details
	Possible values are: • `Cancelled` • `Deleted` • `Draft` • `Paid`
`ScheduledPaymentDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date on which the payment is scheduled.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the status of claim coverage payment detail. Possible values are: • `Authority Approved` • `Authority Denied` • `Cancelled` • `Closed W/O Pay` • `New` • `Open` • `Paid` • `Payment Pending` • `Pending Authority` • `Stopped`
`Type`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the type of claim coverage payment detail. Possible values are: • `Expense`

Field	Details
	• `Loss`

Associated Objects

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

ClaimCoveragePaymentDetailChangeEvent on page 1009
Change events are available for the object in API version 63.0 and later.

ClaimCoverageProdtProcDef

Represents the definition for custom configurations that's used for processing claim coverage payment details. This object is available in API version 65.0 and later.

Supported Calls

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

Fields

Field	Details
`CalcAdjustmentDefId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The definition that's associated with the policy coverage used to calculate the adjusted amount for claim payments. This field is a polymorphic relationship field. **Relationship Name** CalcAdjustmentDef **Refers To** ExpressionSetDefinition, OmniIntegrationProcConfig
`ClaimPaymentType`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies the type of claim coverage payment detail.

Field	Details
	Possible values are: • `Expense` • `Loss`
`DeveloperName`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The unique name of the object in the API.
`DisplayFieldSetValue`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The custom field set that contains additional fields to be displayed on the claim coverage payment detail UI. This field is a calculated field.
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the claim coverage processing definition is active (true) or not (false). The default value is `false`.
`Language`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The combined language and locale ISO code, which controls the language of the ClaimCoverageProdtProcDef object. Possible values are: • `da`—Danish • `de`—German • `en_US`—English • `es`—Spanish

Field	Details
	• es_MX—Spanish (Mexico) • fi—Finnish • fr—French • it—Italian • ja—Japanese • ko—Korean • nl_NL—Dutch • no—Norwegian • pt_BR—Portuguese (Brazil) • ru—Russian • sv—Swedish • th—Thai • zh_CN—Chinese (Simplified) • zh_TW—Chinese (Traditional)
LimitProcessingDefId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The definition that's associated with the policy coverage used to process the limits during claim payments. This field is a polymorphic relationship field. **Relationship Name** LimitProcessingDef **Refers To** ExpressionSetDefinition, OmniIntegrationProcConfig
MasterLabel	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The label for this ClaimCoverageProdtProcDef object value. This display value is the internal label that doesn't get translated.
NamespacePrefix	**Type** string **Properties** Filter, Group, Nillable, Sort

Field	Details
	Description The namespace prefix that is associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix. Limit: 15 characters. You can refer to a component in a managed package by using the ***namespacePrefix__componentName*** notation. The namespace prefix can have one of the following values. • In Developer Edition orgs, `NamespacePrefix` is set to the namespace prefix of the org for all objects that support it, unless an object is in an installed managed package. In that case, the object has the namespace prefix of the installed managed package. This field's value is the namespace prefix of the Developer Edition org of the package developer. • In orgs that are not Developer Edition orgs, `NamespacePrefix` is set only for objects that are part of an installed managed package. All other objects have no namespace prefix.
`PolicyCoverageProdt`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The policy coverage product that's associated with the claim coverage product processing definition.

ClaimCovPaymentAdjustment

Represents the amount increased or decreased on a claim coverage payment as adjustments such as deductibles, copays, or coinsurance when applied on a claimed amount. 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
`AdjustedAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description The amount after adjustments are made in account for deductibles, copay, or coinsurance.
`AdjustmentReason`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The reason for the claim coverage payment detail adjustment such as deductible, copay, or coinsurance.
`ClaimCoveragePaymentDetailId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The Claim Coverage Payment Detail associated with the Claim Coverage Payment Adjustment. This field is a relationship field. **Relationship Name** ClaimCoveragePaymentDetail **Relationship Type** Lookup **Refers To** ClaimCoveragePaymentDetail
`CurrencyIsoCode`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** If multiple currencies are enabled, this field contains the currency ISO code associated with the record. Possible values are: • `AED`—UAE Dirham • `CAD`—Canadian Dollar • `GBP`—British Pound • `JPY`—Japanese Yen • `USD`—U.S. Dollar The default value is `USD`.

Field	Details
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the claim coverage payment detail is active (true) or not (false) in relation to the associated Claim Coverage Payment Detail record. This field is available from API version 65.0 and later. 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** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the claim coverage payment adjustment.

Associated Objects

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

ClaimCovPaymentAdjustmentChangeEvent on page 1009
Change events are available for the object in API version 63.0 and later.

ClaimCovReserveAdjustment

Represents the amount adjusted on a claim coverage reserve as the reserve is changed and payments are made. 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
`AdjustmentAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The amount after adjustments are made in account for deductibles, copay, or coinsurance.
`AdjustmentReason`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The reason for the claim coverage reserve adjustment.
`ClaimCoverageId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The Claim Coverage associated with the Claim Coverage Reserve Adjustment. This field is a relationship field. **Relationship Name** ClaimCoverage **Relationship Type** Lookup **Refers To** ClaimCoverage

Field	Details
ClaimCoverageReserveDetailId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The Claim Coverage Reserve Detail associated with the Claim Coverage Reserve Adjustment. This field is a relationship field. **Relationship Name** ClaimCoverageReserveDetail **Relationship Type** Lookup **Refers To** ClaimCoverageReserveDetail
CurrencyIsoCode	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** If multiple currencies are enabled, this field contains the currency ISO code associated with the record. Possible values are: • AED—UAE Dirham • CAD—Canadian Dollar • GBP—British Pound • JPY—Japanese Yen • USD—U.S. Dollar The default value is USD.
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

Field	Details
	Properties Filter, Nillable, Sort **Description** The timestamp when the current user last viewed this record or list view.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the claim coverage reserve adjustment.

Associated Objects

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

ClaimCovReserveAdjustmentChangeEvent on page 1009
Change events are available for the object in API version 63.0 and later.

ClaimFinancialSettings

Represents the configuration settings for Insurance Claim Financial Services. This object is available in API version 57.0 and later.

Supported Calls

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

Fields

Field	Details
`ClaimCovPendingAuthStatus`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The status of pending financial authority for claim coverage.
`ClaimPendingAuthorityStatus`	**Type** string

Field	Details
	Properties Create, Filter, Group, Sort, Update **Description** The status of pending financial authority for claim.
`ClmCovPymtDtlPendAuthSts`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The status of pending financial authority for claim coverage payment detail.
`DeveloperName`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The unique name for the claim financial settings object.
`Language`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The language of the claim finanical settings.
`MasterLabel`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** Tne unique label that identifies the claim finanical settings throughout the Salesforce user interface.
`NamespacePrefix`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** Namespace prefix associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix.

ClaimItem

Represents claim items (such as collision damage, roadside assistance, rental care) and their coverage details. This object is available in API version 47.0 and later.

Supported Calls

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

Fields

Field	Details
`Category`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the category of the claim item. This field is available from API version 51.0 and later. Possible values are: • `Damaged Property` • `Involved Injury`
`ClaimId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The parent claim that includes this claim item.
`ClaimInstanceIdentifier`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** A unique identifier for the claim item instance. This field is available from API version 65.0 and later.
`ClaimParticipantId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The claim participant associated with the claim item. This field is available from API version 51.0 and later.
`CurrentAddress`	**Type** address **Properties** Filter, Nillable **Description** The location of the claim item. This field is available from API version 51.0 and later. This is a compound field of type Address and combines these fields: City, Country, GeocodeAccuracy, Latitude, Longitude, PostalCode, State, and Street. For more information, see Address Compound Fields.
`Description`	**Type** textarea **Properties** Create, Nillable, Update **Description** The description of the claim item.
`InsurancePolicyAssetId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The insurance policy asset associated with the claim item. This field is available from API version 51.0 and later.
`InsurancePolicyCoverageId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the coverage that covers this claim item.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.

Field	Details
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Name of the item that's included in the claim.
`ProductId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The product that's associated with the claim item. This field is available from API version 65.0 and later.

Associated Objects

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

ClaimItemChangeEvent on page 1009
Change events are available for the object in API version 63.0 and later.

ClaimItemFeed
Feed tracking is available for the object.

ClaimItemHistory
History is available for tracked fields of the object.

ClaimItemAttribute

Represents attributes for a claim item. This object is available in API version 65.0 and later.

Supported Calls

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

Fields

Field	Details
`AttributeDefinitionId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The attribute definition associated with the claim item attribute.
`AttributeName`	**Type** string **Properties** Filter, Group, idLookup, Nillable, Sort **Description** The name of the attribute.
`AttributePicklistValueId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The attribute picklist value associated with the claim item attribute.
`AttributeValue`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The value of the attribute.
`ClaimItemId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The claim item associated with the claim item attribute.

ClaimItemRelatedObject

Represents the relationship between a claim item and a related object. The values of the attributes from the related object are referenced by the relevant product attributes on the claim item. 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
`ClaimItemId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The claim item associated with the related object
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the claim item related object record.

Field	Details
`RelatedRecordIdentifier`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the object that's associated with the related record identifier.
`RelatedRecordObjectName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the claim item related object record.
`UsageType`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the usage of the related record object.

Associated Objects

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

ClaimItemRelatedObjectHistory on page 1021
History is available for tracked fields of the object.

ClaimParticipant

A junction object that associates the Claim object with the Account object. This object represents the participants of a claim. Claim participants include insured, claimants, and witnesses.

Supported Calls

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

Fields

Field	Details
`ClaimId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The ID of the claim in which this participant has one or more roles.
`ClaimInstanceIdentifier`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** A unique identifier for the claim participant instance. This field is available from API version 65.0 and later.
`InsurancePolicyParticipantId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the insurance policy participant associated with this claim. This field is available from API version 51.0 and later.
`IsInjured`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the claim participant was injured in the accident. The default value is False.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime

Field	Details
	Properties Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, Sort **Description** An auto-generated number assigned to this record.
`ParticipantAccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the claim participant's account.
`ParticipantContactId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the claim participant's contact.
`Roles`	**Type** multipicklist **Properties** Create, Filter, Update **Description** The roles that the claim participant can have in the claim. For example, witness, victim, defendant, claimant.
`SourceSystem`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the source system this record was obtained from.

Field	Details
SourceSystemIdentifier	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of this record in the source system.

Associated Objects

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

ClaimParticipantChangeEvent on page 1009
Change events are available for the object in API version 63.0 and later.

ClaimParticipantFeed
Feed tracking is available for the object.

ClaimParticipantHistory
History is available for tracked fields of the object.

ClaimPayoutPlan

Represents the payout plan details for a claim, such as payment frequency, duration, and payouts. This object is available in API version 56.0 and later.

Supported Calls

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

Fields

Field	Details
ClaimId	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The claim associated with the claim payout plan. This field is a relationship field. **Relationship Name** Claim

Field	Details
	Relationship Type Lookup **Refers To** Claim
`CurrencyIsoCode`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** If multiple currencies are enabled, this field contains the currency ISO code associated with the record. Possible values are: • `AED`—UAE Dirham • `CAD`—Canadian Dollar • `GBP`—British Pound • `JPY`—Japanese Yen • `USD`—U.S. Dollar The default value is `USD`.
`EndDate`	**Type** date **Properties** Create, Filter, Group, Sort, Update **Description** The date the claim payout plan ends.
`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.

Field	Details
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Name of the claim payout plan.
`PaymentFrequency`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies the frequency of the payment if the coverage entails a recurring payout to the insured. Possible values are: • `Bi-Weekly` • `Monthly` • `Weekly` • `Yearly`
`PlannedPaymentAmount`	**Type** currency **Properties** Create, Filter, Sort, Update **Description** The amount paid to the party at each payout.
`PreviousClaimPayoutPlanId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The previous payout plan associated with the claim payout plan. This field is a relationship field. **Relationship Name** PreviousClaimPayoutPlan **Relationship Type** Lookup **Refers To** ClaimPayoutPlan

Field	Details
StartDate	**Type** date **Properties** Create, Filter, Group, Sort, Update **Description** The date the claim payout plan starts.

Associated Objects

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

ClaimPayoutPlanChangeEvent on page 1009
Change events are available for the object in API version 63.0 and later.

ClaimPayoutPlanFeed on page 1013
Feed tracking is available for the object.

ClaimPayoutPlanHistory on page 1021
History is available for tracked fields of the object.

ClaimPaymentSummary

Represents the amount of money that's paid to a claimant or claim participant to cover a claim. This object is available in API version 51.0 and later.

Supported Calls

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

Fields

Field	Details
CancellationDate	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date on which claim payment was canceled.
ClaimId	**Type** reference

Field	Details
	Properties Create, Filter, Group, Sort, Update **Description** The ID of the claim associated with this claim payment.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the claim payment summary.
`PaymentAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The amount of the payment.
`PaymentDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the date when the claim payment was initiated.

Field	Details
`PaymentIdentifier`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** A unique identifier for the payment record assigned by the financial transaction system.
`PaymentStatus`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the status of the claim payment. Possible values are: • `Canceled` • `Paid` • `Pending Payment` • `Stopped`

Associated Objects

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

ClaimPaymentSummaryChangeEvent on page 1009
Change events are available for the object in API version 63.0 and later.

ClaimRecovery

Represents a recovery of funds on an insurance claim through subrogation and salvage activities. Recovered amounts can come from a salvage company or through legal litigation or arbitration. Master-detail child object of Claim. 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()`

Special Access Rules

This object is available if the add-on license for Claims Management is enabled.

Fields

Field	Details
`ClaimCoverageId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The claim coverage associated with the claim recovery. This is a relationship field. **Relationship Name** ClaimCoverage **Relationship Type** Lookup **Refers To** ClaimCoverage
`ClaimId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The claim associated with the claim recovery. This is a relationship field. **Relationship Name** Claim **Relationship Type** Lookup **Refers To** Claim
`EstimatedAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The estimated amount the insurance carrier identified to pursue for the claim recovery.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort

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

Field	Details
	Properties Create, Filter, Nillable, Sort, Update **Description** The timestamp the amount was recovered. For multi-currency scenarios, the recovery date is used to retrieve currency conversion rates.
`RecoveryFromAccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The account that the claim is recovered from. This is a relationship field. **Relationship Name** RecoveryFromAccount **Relationship Type** Lookup **Refers To** Account
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Status of the claim recovery. Possible values are: • `Accepted Recovery` • `Accepted with Additional Pursuit` • `Additional Recovery Pursued` • `Disputed Recovery` • `Estimated` • `Partially Recovered` • `Pursued` • `Recovery Canceled` • `Recovery Written Off` • `Referred to Other Department`
`Type`	**Type** picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** Type of claim recovery. Possible values include: • `Salvage` • `Subrogation`

Associated Objects

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

ClaimRecoveryChangeEvent on page 1009
Change events are available for the object in API version 63.0 and later.

ClaimRecoveryFeed on page 1013
Feed tracking is available for the object.

ClaimRecoveryHistory on page 1021
History is available for tracked fields of the object.

ClaimRecoveryOwnerSharingRule on page 1026
Sharing rules are available for the object.

ClaimRecoveryShare on page 1029
Sharing is available for the object.

ClaimTeamMember

Represents a user who is a part of the claim team. This object is available in API version 55.0 and later.

Supported Calls

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

Fields

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

Field	Details
	Description The claim associated with the claim team member. This is a relationship field. **Relationship Name** Claim **Relationship Type** Lookup **Refers To** Claim
`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** The name of the claim team member record.
`Role`	**Type** multipicklist **Properties** Create, Filter, Update **Description** The role of the claim team member. Possible values are: • `Claim Admin` • `Claim Owner`

Field	Details
	• `Claim Supervisor` • `Special Investigative Unit`
`UserId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The user associated with the claim as a claim team member. This is a relationship field. **Relationship Name** User **Relationship Type** Lookup **Refers To** User

Associated Objects

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

ClaimTeamMemberFeed on page 1013
Feed tracking is available for the object.

ClaimTeamMemberHistory on page 1021
History is available for tracked fields of the object.

CommissionStatement

Represents commission summary associated with a party or Commission Statement Line Item. This object is available in API version 61 and later.

Supported Calls

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

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The account that's associated with the commission statement. 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 associated with the commission statement.
`AccountingDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The accounting date of the commission statement.
`CurrencyIsoCode`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** If multiple currencies are enabled, this field contains the currency ISO code associated with the record. Possible values are: • `EUR`—Euro • `GBP`—British Pound • `USD`—U.S. Dollar The default value is `USD`.

Field	Details
ExternalIdentifier	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The external identifier of the financial instrument associated with the commission payment. For example, cheque number or ACH number.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
Name	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the commission statement summary record.
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 **Refers To** Group, User

Field	Details
`PaymentMethod`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the payment method used to pay the commission.
`StatementDate`	**Type** date **Properties** Create, Filter, Group, Sort, Update **Description** The date when the commission statement was generated for an account.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies the status of the commission statement summary. Possible values are: • `Closed` • `Failed` • `In Progress` • `New` • `Processed` • `Processed With Failures`
`TotalBasisAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The total basis amount that's used to calculate the total commission amount in the commission statement.
`TotalCommissionAmount`	**Type** currency **Properties** Create, Filter, Sort, Update

Field	Details
	Description The total commission amount associated with the commission statement.
`Type`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the type of commission statement.
`UsageType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the application using the commission statement to populate data. Possible values are: • `InsuranceBrokerage`—Insurance Brokerage • `Other`

Associated Objects

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

CommissionStatementChangeEvent on page 1009
Change events are available for the object in API version 62.0 and later.

CommissionStatementHistory on page 1021
History is available for tracked fields of the object.

CommissionStatementOwnerSharingRule on page 1026
Sharing rules are available for the object.

CommissionStatementShare on page 1029
Sharing is available for the object.

CommissionStatementLineItem

Represents commission information associated with a service or an item. This object is available in API version 61 and later.

Supported Calls

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

Fields

Field	Details
`ApplyToDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date to which the commission amount should be applied when crediting the commission to the producer.
`BasisAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Specifies the basis amount on which the commission percent was applied to calculate the commission amount.
`CarrierAccountName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the carrier associated with the insurance policy.
`ClientAccountName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the client associated with the insurance policy.
`CommissionAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description The commission amount associated with the insurance policy in the commission statement line item.
`CommissionPercent`	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** The rate that's used for the commission calculation.
`CommissionStatementId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The commission statement associated with the commission statement line. This field is a relationship field. **Relationship Name** CommissionStatement **Relationship Type** Master-detail **Refers To** CommissionStatement (the master object)
`CommissionType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the type of commission associated with the commission statement line item.
`CurrencyIsoCode`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** If multiple currencies are enabled, this field contains the currency ISO code associated with the record. Possible values are: • `EUR`—Euro

Field	Details
	• `GBP`—British Pound • `USD`—U.S. Dollar The default value is `USD`.
`ExternalIdentifier`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The external reference number associated with the comission statement line item.
`FailureMessage`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The failure message when processing fails for the commission statement line item.
`InsurancePolicyEffectiveDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The effective date of the insurance policy that's specified in the commission statement.
`InsurancePolicyExpirationDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date until when the insurance policy remains effective.
`InsurancePolicyNumber`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The insurance policy number specified in the commission statement.
`InsurancePolicyRenewalDate`	**Type** date

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The renewal date of the insurance policy that's specified in the commission statement.
`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.
`LineOfBusiness`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the line of business for the commission statement line item. Possible values are: • `Employee Benefits` • `Property & Casualty`
`LineOfCoverage`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the coverage type for the commission statement line item.
`Name`	**Type** string

Field	Details
	Properties Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the commission statement line 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 **Refers To** Group, User
ReferenceRecordId	The reference record associated with the commission statement line item.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the status of the commission statement line item.
`TransactionDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date on which the transaction that generated the commission has occurred.
`TransactionType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the transaction type of the commission statement line item.

Associated Objects

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

CommissionStatementLineItemChangeEvent on page 1009
Change events are available for the object in API version 62.0 and later.

CommissionStatementLineItemHistory on page 1021
History is available for tracked fields of the object.

CommissionStatementLineItemOwnerSharingRule on page 1026
Sharing rules are available for the object.

CommissionStatementLineItemShare on page 1029
Sharing is available for the object.

ContextMappingConfig

Represents the context mapping configurations for business process types. This object is available in API version 65.0 and later.

Supported Calls

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

Fields

Field	Details
`ContextDefinition`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** The context definition that's associated with the context mapping configuration. Possible values are: • `ClaimContext__stdctx`
`ContextMapping`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** The context mapping that's associated with the context mapping configuration. Possible values are: • `ClaimMapping`

Field	Details
IsActive	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the claim context mapping is active (true) or not (false) in relation to the associated Context Mapping Configuration record. The default value is `false`.
UsageType	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies the usage type that's associated with the context mapping configuration. Possible values are: • `Claim`

ContractGroupPlan

Represents a set of plans as part of the contract between the insurance carrier and the group. This set of plans corresponds to the plans included in the quote (as Quote Line Items). Child object of Contract. This object is available in API version 55.0 and later.

Supported Calls

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

Fields

Field	Details
AccountId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The group account associated with the contract group plan. This is a relationship field.

Field	Details
	Relationship Name Account **Relationship Type** Lookup **Refers To** Account
`ContractGroupParentPlanId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The contract group parent plan associated with the contract group plan. This is a relationship field. **Relationship Name** ContractGroupParentPlan **Relationship Type** Lookup **Refers To** ContractGroupPlan
`ContractId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The contract associated with the contract group plan. This is a relationship field. **Relationship Name** Contract **Relationship Type** Lookup **Refers To** Contract
`EffectiveEndDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The effective end date of the plan line item.

Field	Details
`EffectiveStartDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The effective start date of the plan line item.
`EligibilityCriteria`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The eligibility criteria for the contract group plan.
`EnrollmentEndDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when enrollment ends for the plans in the contract.
`EnrollmentRatingType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the enrollment rating type. Possible values are: • `Composite` • `Rate`
`EnrollmentStartDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when enrollment starts for the plans in the insurance contract.
`EnrollmentWaitingPeriod`	**Type** int

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The waiting period in days after joining date before enrollment can begin.
`GroupNumber`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The group number associated with the group account. Required for the enrollment process.
`IsOptional`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the coverage product plan is optional (true) or mandatory (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** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the contract group plan.

Field	Details
`OriginalContractPlanId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The original contract plan associated with the contract group plan. This is a relationship field. **Relationship Name** OriginalContractPlan **Relationship Type** Lookup **Refers To** ContractGroupPlan
`PlanType`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** Specifies the category for each contract plan.
`PricingStructure`	**Type** textarea **Properties** Create, Nillable, Update **Description** The structure of pricing based on the rate band tiers.
`ProductNumber`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The product number associated with a contract group plan.
`QuoteLineItemId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The quote line item associated with the contract group plan.

Field	Details
	This is a relationship field. **Relationship Name** QuoteLineItem **Relationship Type** Lookup **Refers To** QuoteLineItem
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The status of the group contract plan. Possible values are: • `Active` • `Inactive`
`UnitPrice`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The price of the contract group plan.
`UsageType`	**Type** picklist **Properties** Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort **Description** Internal field. Specifies the application using the group census to populate data. For example, Insurance or Loyalty. Possible values are: • `Insurance` The default value is 'Insurance'.

Associated Objects

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

ContractGroupPlanChangeEvent on page 1009
Change events are available for the object in API version 62.0 and later.

ContractGroupPlanFeed on page 1013
Feed tracking is available for the object.

ContractGroupPlanHistory on page 1021
History is available for tracked fields of the object.

ContractGroupPlanAttribute

This object is available in API version XX.0 and later.

Supported Calls

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

Special Access Rules

Fields

Field	Details
`AttributeDefinitionId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** This field is a relationship field. **Relationship Name** AttributeDefinition **Refers To** AttributeDefinition
`AttributeName`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description**
`AttributePicklistValueId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description This field is a relationship field. **Relationship Name** AttributePicklistValue **Refers To** AttributePicklistValue
`ContractGroupPlanId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** This field is a relationship field. **Relationship Name** ContractGroupPlan **Relationship Type** Master-detail **Refers To** ContractGroupPlan (the master object)
`ExternalId`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description**
`Value`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description**

ContractGroupPlanGroupClass

Represents the association of a Contract Group Plan to a Group Class. Use this entity to define group classes and group class contributions at the contract group plan level. This object is available in API version 56.0 and later.

Supported Calls

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

Fields

Field	Details
`ContractGroupPlanId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The Contract Group Plan associated with the Contract Group Plan Group Class. This field is a relationship field. **Relationship Name** ContractGroupPlan **Relationship Type** Lookup **Refers To** ContractGroupPlan
`CurrencyIsoCode`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** If multiple currencies are enabled, this field contains the currency ISO code associated with the record. Possible values are: • `AED`—UAE Dirham • `CAD`—Canadian Dollar • `GBP`—British Pound • `JPY`—Japanese Yen • `USD`—U.S. Dollar The default value is `USD`.
`GroupClassId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The Group Class associated with the Contract Group Plan Group Class. This field is a relationship field. **Relationship Name** GroupClass **Relationship Type** Lookup **Refers To** GroupClass
`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** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the contract group plan group class.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The Owner associated with the Contract Group Plan Group Class. This field is a polymorphic relationship field. **Relationship Name** Owner

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

Associated Objects

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

ContractGroupPlanGroupClassChangeEvent on page 1009
Change events are available for the object in API version 62.0 and later.

ContractGroupPlanGroupClassFeed on page 1013
Feed tracking is available for the object.

ContractGroupPlanGroupClassHistory on page 1021
History is available for tracked fields of the object.

ContractGroupPlanGroupClassOwnerSharingRule on page 1026
Sharing rules are available for the object.

ContractGroupPlanGroupClassShare on page 1029
Sharing is available for the object.

ContractGrpPlanGrpClsAttr

Represents a view of the attributes selected for each contract group plan group class. This object is available in API version 64.0 and later.

Supported Calls

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

Fields

Field	Details
`AttributeDefinitionId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The attribute definition associated with the contract group plan group class attribute. This field is a relationship field.

Field	Details
	Relationship Name AttributeDefinition **Refers To** AttributeDefinition
`AttributeName`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the attribute in the contract group plan group class.
`AttributePicklistValueId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** An attribute associated with the contract group plan group class when the attribute is of type Picklist. This field is a relationship field. **Relationship Name** AttributePicklistValue **Refers To** AttributePicklistValue
`ContractGroupPlanGroupClassId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The parent contract group plan group class that's associated with the contract group plan group class attribute. This field is a relationship field. **Relationship Name** ContractGroupPlanGroupClass **Relationship Type** Master-detail **Refers To** ContractGroupPlanGroupClass (the master object)

Field	Details
`ExternalId`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The Id of the attribute in a contract group plan group class.
`Value`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The value of an attribute in the contract group plan group class.

CoverageType

Represents the type of coverage, such as liability, earthquake, or collision damage. You see this object only if you have enabled the Access Master List of Coverage Types org pref.

Supported Calls

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

Fields

Field	Details
`BenefitPaymentFrequency`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The frequency of the payment if the benefit or coverage entails a recurring payout to the insured.
`Category`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The category that the coverage belongs to. For example, benefit, clause, deductible, rider.
`CategoryCode`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** A carrier-specific code that identifies the coverage. For example, benefit, clause, or deductible.
`CategoryGroup`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The specific category group. For example, for a liability coverage record, benefit is the category and liability is the category group.
`CategoryGroupType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of the category group.
`CategoryGroupTypeValue`	**Type** multipicklist **Properties** Create, Filter, Nillable, Update **Description** Identifies the coverage limit type. For example, for a liability coverage of USD 1000 per person and USD 1500 per occurrence, Amount per Person and Amount per Occurrence are the category group type values.
`CoverageCode`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** A carrier-specific code that identifies the policy limit code in the source system.

Field	Details
DeathBenefitOptionType	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The method for the payment of death benefit.
DeductibleAmount	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The deductible amount that the customer must pay.
Description	**Type** textarea **Properties** Create, Nillable, Update **Description** The description of the coverage type.
Discount	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The discount that was given on the coverage or the benefit.
EffectiveDate	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date from which the coverage is in effect.
ExpirationDate	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date on which the coverage expires.

Field	Details
IncomeOptionType	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of the income option given to the policy participant. For example, periodic payment is an income option type, and annuity is an income option.
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.
LimitAmount	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The limit of the fixed coverage amount. For example, uninsured motorist coverage of USD 1000.
LimitDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date from which the coverage limit is in effect. For example, an annuity benefit is valid only after the insured is 60 years old.
LimitPercentage	**Type** percent

Field	Details
	Properties Create, Filter, Nillable, Sort, Update **Description** The percentage of the actuals covered by this coverage.
`LimitRange`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The range of the coverage limit. For example, bodily injury coverage with limits as USD 100,000 per person and USD 300,000 per accident.
`Name`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** An auto-generated number assigned to this record.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the record owner.
`PremiumAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The premium paid by the customer for this coverage.
`SourceSystem`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the source system this record was obtained from.

Field	Details
SourceSystemIdentifier	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of this coverage record in the source system.

Associated Objects

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

CoverageTypeChangeEvent on page 1009
Change events are available for the object in API version 62.0 and later.

CoverageTypeFeed
Feed tracking is available for the object.

CoverageTypeHistory
History is available for tracked fields of the object.

CoverageTypeOwnerSharingRule
Sharing rules are available for the object.

CoverageTypeShare
Sharing is available for the object.

CustomerProperty

Represents the insurable and insured properties of a customer.

Supported Calls

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

Fields

Field	Details
Address	**Type** address **Properties** Filter, Nillable **Description** The location of the property.

Field	Details
	This is a compound field of type Address and combines these fields: City, Country, GeocodeAccuracy, Latitude, Longitude, PostalCode, State, and Street. For more information, see Address Compound Fields.
`AnnualMileage`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The distance that the vehicle is expected to be driven in a year.
`AssetId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the asset associated with this customer property.
`BathroomCount`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The total number of bathrooms in the property.
`BedroomCount`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The total number of bedrooms in the property.
`BuiltUpArea`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The property's usable area, which is also known as the carpet area.
`CeilingType`	**Type** picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The type of the ceiling the property has. For example, conventional, beam, shed, cove, tray, suspended.
ConstructionClass	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of the property's construction. For example, framed, masonry non-combustible, modified, semi-resistive, or fire resistive.
DaysDrivenTowork	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The number of days that the vehicle was used to drive to work.
Description	**Type** textarea **Properties** Create, Nillable, Update **Description** The description of the asset.
DwellingType	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The property's dwelling type on the policy creation date. For example, ranch, single family, or condo.
EngineDisplacementVolume	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The engine capacity of the vehicle.

Field	Details
FactoryPrice	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The price of the vehicle billed by the manufacturer.
FairMarketValue	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The estimated market price of the vehicle on the policy creation date.
FinancingType	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of financing used to purchase the asset.
FloorCount	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The number of stories in the property.
FloorType	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of the floor the property had on the policy creation date. For example, ceramic tile, porcelain tile, floating wood tile.
FoundationType	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The type of the property's foundation. For example, pier and beam, slab.
`FuelType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The fuel system of the vehicle.
`GarageSpaceCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The number of parking spaces available in the property.
`GarageType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of the garage the property has.
`GrossVehicleWeight`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Vehicle’s weight.
`IsBasementIncluded`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the property has a basement. The default value is False.
`IsChimneyIncluded`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	Description Indicates whether the property has a chimney. The default value is False.
`IsPassedSmogCheck`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the vehicle has passed the smog check. The default value is False.
`IsSwimmingPoolIncluded`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the property has a swimming pool. The default value is False.
`KitchenCount`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The total number of kitchens in the property.
`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.
`LeasePeriod`	**Type** int

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The current lease period for the property.
`LienHolderName`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** The bank or the financial firm that legally owns the asset.
`LoadCapacity`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Vehicle's load-carrying capacity.
`LotArea`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The total area of the plot on which the property is constructed, including the construction area and the open area on all sides.
`Make`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The brand of the vehicle.
`MakeYear`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The year in which the vehicle was manufactured.

Field	Details
`MilesDrivenToWork`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The number of miles that the vehicle covered when it was used to drive to work.
`ModelName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The model name of the vehicle.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, Sort **Description** An auto-generated number assigned to this record.
`OdometerReading`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Vehicle's odometer reading on the policy creation date.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the record owner.
`PassengerSeatCapacity`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The legal seating capacity of the vehicle.

Field	Details
PrimaryOwnerId	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** ID of the primary owner of the asset.
PrimaryUse	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** What the vehicle is primarily going to be used for.
PurchaseDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date on which this property was purchased.
PurchasePrice	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The amount of money paid by the owner to purchase this property.
RegistrationNumber	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** Vehicle's license plate number.
RegistrationType	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Vehicle's registration type. For example, antique, combo, apportioned, commercial.

Field	Details
`RoofType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of the roof the property has.
`SourceSystem`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the source system this property record was obtained from.
`SourceSystemIdentifier`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of this property record in the source system.
`TransmissionType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The transmission type of the vehicle.
`Vin`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Vehicle's identification number.
`YearBuilt`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The year in which the property was constructed.

Associated Objects

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

CustomerPropertyChangeEvent on page 1009
Change events are available for the object in API version 62.0 and later.

CustomerPropertyFeed
Feed tracking is available for the object.

CustomerPropertyHistory
History is available for tracked fields of the object.

CustomerPropertyOwnerSharingRule
Sharing rules are available for the object.

CustomerPropertyShare
Sharing is available for the object.

CustomObjectParticipant

Represents information about a participant in the context of a custom object record. This object is available in API version 55.0 and later.

Supported Calls

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

Fields

Field	Details
`Comments`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The additional information about the participant.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime

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

Field	Details
ParticipantRoleId	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The role associated with the participant. This field is a relationship field. **Relationship Name** ParticipantRole **Relationship Type** Lookup **Refers To** ParticipantRole
ReferenceObjectId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort **Description** The parent custom object record that's related to this participant record. This field is a polymorphic relationship field. **Relationship Name** ReferenceObject **Relationship Type** Lookup **Refers To** FSC12__AccountAccountRelation__c, FSC12__Alert__c, FSC12__AssetsAndLiabilities__c, FSC12__B2CLeadCompanyNameConfig__c, FSC12__BillingStatement__c, FSC12__Card__c, FSC12__ChargesAndFees__c, FSC12__ContactContactRelation__c, FSC12__Education__c, FSC12__Employment__c, FSC12__FinancialAccountRole__c, FSC12__FinancialAccountTransaction__c, FSC12__FinancialAccount__c, FSC12__FinancialGoal__c, FSC12__FinancialHolding__c, FSC12__IdentificationDocument__c, FSC12__IndustriesAppConfig__c, FSC12__IndustriesSettings__c, FSC12__LifeEvent__c, FSC12__NextLastInteractionSettings__c, FSC12__PolicyPaymentMethod__c, FSC12__QueryOptimization__c, FSC12__ReciprocalRole__c, FSC12__Record_Rollup_Configuration__c, FSC12__Record_Rollup_and_Trigger_Configuration__c, FSC12__Revenue__c, FSC12__RollupByLookupConfig__c, FSC12__RollupByLookupFilterCriteria__c, FSC12__Securities__c, FSC12__UsePersonAccount__c, FSC12__WealthAppConfig__c, FSC12__individualExcludedFields__c, vlocity_lwc27__CardFrameworkConfiguration__c, vlocity_lwc27__DRBatchQueue__c, vlocity_lwc27__DRBulkData__c, vlocity_lwc27__DREncryption__c, vlocity_lwc27__DRWorker__c,

Field	Details
	vlocity_lwc27__Interface_DRGeneric__c, vlocity_lwc27__TestResult__c, vlocity_lwc27__TriggerSetup__c, vlocity_lwc27__UISettings__c, vlocity_lwc27__VlocityDataPack__c, vlocity_lwc27__VlocityDocuSignTemplate__c, vlocity_lwc27__VlocityErrorLogEntry__c, vlocity_lwc27__VlocityScheduledJob__c, vlocity_lwc27__VlocityTrackingEntry__c

Associated Objects

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

CustomObjectParticipantChangeEvent **on page 1009**
Change events are available for the object.

CustomObjectParticipantFeed
Feed tracking is available for the object.

CustomObjectParticipantHistory
History is available for tracked fields of the object.

CustomObjectParticipantShare
Sharing is available for the object.

Deviation

Represents the information about the deviation from set rules. This object is available in API version 61.0 and later. Available with Digital Lending permission set.

Supported Calls

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

Special Access Rules

Fields

Field	Details
`ApprovalStatus`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the approval status of the deviation.

Field	Details
	Possible values are: • `Approved` • `Pending` • `Rejected` • `Submitted`
`Code`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The unique code for the deviation.
`Description`	**Type** textarea **Properties** Create, Nillable, Update **Description** The description about the deviation.
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the deviation is active (true) or (not). The default value is `false`.
`IsApprovalRequired`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether an approval is required (true) or not (false) for the deviation. The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort

Field	Details
	Description The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`MinimumApproverLevel`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the minimum level of the approver who can approve the deviation. Possible values are: • `L1` • `L2` • `L3`
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the deviation record.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the user who created the record. This field is a polymorphic relationship field. **Relationship Name** Owner **Refers To** Group, User

Field	Details
`Type`	**Type** picklist **Properties** Create, Filter, Group, Sort, Update **Description** Specifies the type of deviation. Possible values are: • `Credit` • `Debt to Income` • `Loan To Value` • `Sanction Terms`

Dispute

Represents the details of a dispute that involves one or multiple disputed transactions. This object is available in API version 59.0 and later.

Supported Calls

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

Special Access Rules

These fields are available if the add-on license for Financial Services Cloud is enabled.

- ActualAmount
- ApprovedAmount
- FinancialAccount
- DisputedAmount
- IsCardCancellationRequested
- IsCardReissueRequested

Fields

Field	Details
`AccountId`	**Type** reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The Person Account associated with the dispute. This field is a relationship field. **Relationship Name** Account **Relationship Type** Lookup **Refers To** Account
`ActualAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The total amount of all associated transactions.
`ApprovedAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The amount that's approved to be credited to the customer.
`AssessmentId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The Assessment associated with the dispute. This field is a relationship field. **Relationship Name** Assessment **Relationship Type** Lookup **Refers To** Assessment

Field	Details
`CaseId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The Case associated with the dispute. This is the related case to track the lifecycle of the dispute. This field is a relationship field. **Relationship Name** Case **Relationship Type** Lookup **Refers To** Case
`Description`	**Type** textarea **Properties** Create, Nillable, Update **Description** The description of the dispute.
`DisputeSubtype`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the subtype of dispute. Possible values are: • `Account Debited but No Cash Dispensed by ATM` • `Charged Multiple Times` • `Defective Product` • `Disclosed OTP, Card, or Account Details` • `Failed Transaction` • `Fraudulent Transaction` • `Lost or Stolen Card` • `Outstanding Charge on Original Payment Method` • `Overcharged` • `Products or Services Not as Described` • `Refund Not Processed`

Field	Details
	• `Undelivered Product or Service`
`DisputeType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the type of dispute. Possible values are: • `Processing Error` • `Consumer Dispute` • `Fraud`
`DisputedAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The total amount claimed in the dispute.
`IsCardCancellationRequested`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether card cancellation was requested (true) or not (false). The default value is `false`.
`IsCardReissueRequested`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether card reissue was requested (true) or not (false). The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort

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

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the status of the disputed transaction. Possible values are: • `In Review` • `Invalid` • `No longer disputed` • `Resolved` • `Settled` • `Submitted`

Associated Objects

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

DisputeHistory on page 1021
History is available for tracked fields of the object.

DisputeOwnerSharingRule on page 1026
Sharing rules are available for the object.

DisputeShare on page 1029
Sharing is available for the object.

DisputeItem

Represents a transaction that's being disputed. This object is available in API version 59.0 and later.

Supported Calls

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

Fields

Field	Details
`AcquirerReferenceNumber`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description A unique identifier assigned to a transaction by the payment network if the transaction was done through a payment gateway. Available in version 61.0 and later.
`ApprovedProvisionalCredit`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The provisional credit amount that's approved for the dispute. Available in version 60.0 and later.
`CardBrand`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the brand or network associated with the card that was used in the disputed transaction.
`CardLastFourDigit`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The last four digits of the credit or debit card number that's associated with this transaction. These digits are commonly used to verify the transaction and identify the cardholder. Available in version 60.0 and later.
`CardSixDigitBin`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The first six digits of the credit or debit card number that's associated with this transaction. These digits are used to identify the card issuer. Available in version 60.0 and later.
`CardType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update

Field	Details
	Description Specifies the type of card used in the transaction. Available in version 61.0 and later. Possible values are: • `Credit Card` • `Debit Card` • `Prepaid Card`
`CaseClaimIdentifier`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** A unique identifier of the claim associated with an arbitration or compliance case . Available in version 62.0 and later.
`ClaimIdentifier`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** A unique identifier of the claim associated with the chargeback. Available in version 61.0 and later.
`ClearingMerchantName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the merchant or business that accepted the payment through a card transaction. Available in version 61.0 and later.
`ClearingTrxnAmountLocal`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The cleared amount of the disputed transaction in the local currency.. Available in version 62.0 and later.
`ClearingTrxnAmountLocalCrcy`	**Type** string

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The cleared amount of the disputed transaction in the local currency. Available in version 62.0 and later.
`DisputeId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The unique identifier of the transaction. This field is a relationship field. **Relationship Name** Dispute **Relationship Type** Lookup **Refers To** Dispute
`DisputeReasonId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The Dispute Reason associated with the dispute item. Available in version 61.0 and later. This field is a relationship field. **Relationship Name** DisputeReason **Relationship Type** Lookup **Refers To** DisputeReason
`DisputedAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The amount in the transaction that's under question or dispute.

Field	Details
`EnrichmentProvider`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the name of the enrichment provider that provides additional information associated with the transaction, such as merchant name, address, description, and URL. Available in version 60.0 and later.
`FundFlowDirection`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the direction of funds in the transaction that's being disputed. Available in version 60.0 and later. Possible values are: • `Credit` • `Debit` • `INFLOW` • `OUTFLOW` • `Withdrawal`
`IsCardPresent`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the payment card was present with the cardholder (true) or not (false) during the transaction. Available in version 61.0 and later. The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime

Field	Details
	Properties Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`MerchantAddress`	**Type** address **Properties** Filter, Nillable **Description** The address of the merchant associated with the transaction. Available in version 60.0 and later.
`MerchantCategory`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The category associated with the merchant based on the type of products or services the merchant provides. Available in version 60.0 and later.
`MerchantDescription`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description of the merchant associated with the transaction. Available in version 60.0 and later.
`MerchantName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the merchant associated with the transaction. Available in version 60.0 and later.
`MerchantUrl`	**Type** url **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The website URL of the merchant associated with the transaction. Available in version 60.0 and later.
`MerchantLogoUrl`	**Type** url **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The logo URL of the merchant associated with the transaction. Available in version 60.0 and later.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** Name of the DisputeItem record.
`PaymentNetwork`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the payment network that faciliates the exchange of funds between parties involved. Available in version 61.0 and later. Possible values are: • `ACH` • `American Express` • `Diners` • `Mastercard` • `Visa` • `Zelle`
`ProvisionalCreditApproverId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The User associated with the Dispute. The user is the approver of provisional credit amount. Available in version 60.0 and later.

Field	Details
	This field is a relationship field. **Relationship Name** ProvisionalCreditApprover **Relationship Type** Lookup **Refers To** User
`ProvisionalCreditDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the provisional credit amount was credited. Available in version 60.0 and later.
`ProvisionalCreditStatus`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the status of the provisional credit amount. Available in version 60.0 and later. Possible values are: • `Completed` • `In Progress` • `Initiated` • `Not Applicable`
`ReceiverBin`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The unique identifier of the entity who filed an arbitration or compliance case. Available in version 62.0 and later.
`SenderBin`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The unique identifier of the entity against which an arbitration or compliance case is filed. Available in version 62.0 and later.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the status of the disputed transaction. Possible values are: • `Submitted` • `Invalid` • `No longer disputed` • `Resolved`
`TransactionAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The total amount involved in the transaction.
`TransactionCode`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The unique code that identifies the type of transaction.
`TransactionCurrencyCode`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The unique code associated with the currency used in this transaction.
`TransactionDate`	**Type** date **Properties** Create, Filter, Group, Sort, Update

Field	Details
	Description The date of the transaction.
`TransactionDescription`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description of the transaction.
`TransactionIdentifier`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The unique identifier of the transaction.
`TransactionsApiSearchResult`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The search result of the transactions API. Available in version 61.0 and later.
`TrxnApiAuthorizationResult`	**Type** textarea **Properties** Create, Nillable, Update **Description** The authorization information obtained from the transactions API. Available in version 61.0 and later.
`TrxnApiClrAndStlResult`	**Type** textarea **Properties** Create, Nillable, Update **Description** The clearing and settlement information obtained from the transactions API. Available in version 61.0 and later.
`TrxnAuthorizationIdentifier`	**Type** string

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The unique identifier generated during the authorization phase of a transaction to verify the availability of sufficient funds in the cardholder's account to proceed with the transaction. Available in version 61.0 and later.
`TrxnClearingIdentifier`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The unique identifier assigned to a transaction during clearing and settlement process to track the transaction's progress and facilitate funds transfer between parties. Available in version 61.0 and later.
`ValidationOutcome`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the outcome of the validation rules run on the disputed transaction. Possible values are: • `Automatic write-off` • `Eligible` • `Invalid`
`ValidationOutcomeReason`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The reason for the transaction's validation outcome. Available in version 60.0 and later.

DisputeItemArbitration

Represents the details of the arbitration or compliance case filed for a transaction that's being disputed. This object is available in API version 62.0 and later.

Supported Calls

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

Special Access Rules

Fields

Field	Details
`Amount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The amount that's claimed by a party in a disputed transaction.
`Description`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description of the arbitration or compliance case.
`DisputeItemId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The Dispute Item asscoiated with an arbitration or compliance case. This field is a relationship field. **Relationship Name** DisputeItem **Relationship Type** Master-detail **Refers To** DisputeItem (the master object)
`DisputeReasonId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The Dispute Reason associated with the disputed transaction for which an arbitration or compliance case is filed. This field is a relationship field. **Relationship Name** DisputeReason **Refers To** DisputeReason
`DocumentUploadStatus`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the upload status of the document or an image related to the arbitration or compliance case. Possible values are: • `Completed` • `Failed` • `Unprocessed`
`ExternalCaseIdentifier`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The uniqie identifier of the arbitration or compliance case assigned to a disputed transaction by a dispute management system, such as Mastercom or Visa.
`IsEscalated`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates if the pre-arbitration case was escalated (true) or not (false) to create an arbitration case. The default value is `false`.
`IsReasonCodeUpdated`	**Type** boolean

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates if the reason code for the disputed transaction was updated (true) or not (fasle) before filing the arbitration or compliance case. The default value is `false`.
`Memo`	**Type** textarea **Properties** Create, Nillable, Update **Description** The memo content of the arbitration or compliance case.
`ReasonCodeUpdateReason`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description for the reason code update.
`Role`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the role under which an entity filed the arbitration or compliance case. Possible values are: • `Acquirer` • `Issuer`
`Status`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The status of the arbitration or compliance case retrieved from a dispute management system.
`Type`	**Type** picklist

Field	Details
	Properties Create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies the type of case filed for the transaction that's being disputed. Possible values are: • `Arbitration` • `Compliance` • `Pre-Arbitration` • `Pre-Compliance`

Associated Objects

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

DisputeItemArbitrationChangeEvent on page 1009
Change events are available for the object.

DisputeItemArbitrationFeed on page 1013
Feed tracking is available for the object.

DisputeItemArbitrationHistory on page 1021
History is available for tracked fields of the object.

DisputeItemArbitrationOwnerSharingRule on page 1026
Sharing rules are available for the object.

DisputeItemArbitrationShare on page 1029
Sharing is available for the object.

DisputeItemMerchantAlert

Represents the alert sent by the card issuer to the merchant. The alert occurs through a chargeback prevention vendor like Ethoca Merchant Alerts™ for a transaction that's being disputed. This object is available in API version 60.0 and later.

Supported Calls

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

Special Access Rules

These fields are available if the add-on license for Financial Services Cloud is enabled.

Fields

Field	Details
`AlertDeliveryStatus`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the delivery status of the alert associated with an individual transaction in a batch of disputed transactions. Possible values are: • `Delivered` • `Undelivered` • `Failed` • `Ignored` • `Updated`
`AlertDlvrStatusDescription`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description of the delivery status of the alert.
`AlertIdentifier`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** A unique identifier assigned to a merchant alert related to the transaction that's being disputed. The alert identifier is generated by a chargeback prevention system like Ethoca.
`DisputeItemId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The Dispute Item associated with the merchant alert. This field is a relationship field. **Relationship Name** DisputeItem

Field	Details
	Relationship Type Lookup **Refers To** DisputeItem
DisputedTrxnBatchIdentifier	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** An unique identifier assigned to the request made by the issuer for submitting a group of disputed transactions. Each group of disputed transactions is called a batch. The batch identifier is generated by a chargeback prevention system like Ethoca.
DisputedTrxnBatchStatus	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies the status of the batch of disputed transactions that includes this transaction. Possible values are: • IN PROGRESS • PROCESSED
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
Name	**Type** string

Field	Details
	Properties Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** Name of the DisputeItem record.
`Outcome`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the outcome of the alert selected by the merchant. Possible values are: • `Resolved` • `Previously Refunded` • `Unresolved` • `Not Found` • `Other`
`OutcomeDescription`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description of the alert outcome.
`OutcomeUpdateDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time when the merchant last updated the alert outcome of the transaction that's being disputed. The timestamp is represented in the ISO 8601 format.
`RefundStatus`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the status of the refund issued by the merchant in response to the customer's dispute alert. Possible values are:

Field	Details
	• `Yes` • `No` • `Not Settled`
`Source`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies the source of the merchant alert. Possible values are: • `Ethoca` The default value is `Ethoca`.
`Type`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies the type of alert associated with the transaction that's being disputed. Possible values are: • `Confirmed Fraud` • `Consumer Dispute`

Associated Objects

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

DisputeItemMerchantAlertChangeEvent on page 1009
Change events are available for the object.

DisputeItemMerchantAlertFeed on page 1013
Feed tracking is available for the object.

DisputeItemMerchantAlertHistory on page 1021
History is available for tracked fields of the object.

DisputeItemMerchantAlertOwnerSharingRule on page 1026
Sharing rules are available for the object.

DisputeItemMerchantAlertShare on page 1029
Sharing is available for the object.

DisputeItemChargeback

Represents the claim and chargeback created by the card issuer for a transaction that's being disputed. This object is available in API version 61.0 and later.

Supported Calls

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

Fields

Field	Details
`ChargebackAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The total amount claimed by the issuer using a chargeback for the disputed transaction. Available in version 62.0 and later.
`ChargebackAmountCurrency`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The currency in which the chargeback amount is credited to the cardholder. Available in version 62.0 and later.
`ChargebackCreatedData`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** TThe date when the chargeback was created for a disputed transaction. Available in version 62.0 and later.
`ChargebackIdentifier`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The unique identifier of the chargeback assigned by the dispute system.

Field	Details
ChargebackReferenceNumber	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** A unique reference number that's associated with the chargeback process, enabling the issuer to track the chargeback throughout its lifecycle, including pre-arbitration case.
Description	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description of the chargeback request provided by the member or the entity filing the chargeback.
DisputeItemId	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The Dispute Item associated with the chargeback. This field is a relationship field. **Relationship Name** DisputeItem **Relationship Type** Master-detail **Refers To** DisputeItem (the master object)
DisputeReasonId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The dispute reason associated with the chargeback. This field is a relationship field. **Relationship Name** DisputeReason **Relationship Type** Lookup

Field	Details
	Refers To DisputeReason
`DocumentStatus`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The status of a document associated with the chargeback.
`IsDocumentRequired`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether a supporting document is required (true) or not (false) for dispute resolution. The default value is `false`.
`IsPartialChargeback`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the cardholder has disputed only a portion of the transaction amount (true) or not (false). The default value is `false`.
`IsRefundReceived`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the cardholder received the expected refund (true) or not (false) for the chargeback. The default value is `false`.
`RejectReason`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The reason for rejecting the chargeback by the dispute system.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the status of chargeback. Possible values are: • `Closed` • `Not Submitted` • `Rejected` • `Rejected By Merchant` • `Submitted`
`StatusUpdateDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time when the chargeback status was last updated. The timestamp is represented in the ISO 8601 format.
`TransactionSettlementDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the transaction was completed and the funds were transferred between the parties involved.
`Type`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the type of chargeback based on the dispute reason. Possible values are: • `Chargeback`

Field	Details
	• `Second Presentment`

Associated Objects

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

DisputeItemChargebackChangeEvent on page 1009
Change events are available for the object.

DisputeItemChargebackFeed on page 1013
Feed tracking is available for the object.

DisputeItemChargebackHistory on page 1021
History is available for tracked fields of the object.

DisputeItemChargebackOwnerSharingRule on page 1026
Sharing rules are available for the object.

DisputeItemChargebackShare on page 1029
Sharing is available for the object.

DisputeReason

Represents the reason for the transaction dispute. This object is available in API version 61.0 and later.

Supported Calls

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

Special Access Rules

Fields

Field	Details
`CardType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the type of card used in the transaction that's being disputed. Possible values are: • `Credit Card`

Field	Details
	• `Debit Card` • `Prepaid Card`
`Description`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description of the reason.
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether a reason code is active (true) or not (false). The default value is `false`.
`IsDocumentRequired`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether supporting document is required (true) or not (false) for the reason code. The default value is `false`.
`PaymentNetwork`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies the payment network that faciliates the exchange of funds between parties involved. Possible values are: • `ACH` • `American Express` • `Diners` • `Mastercard` • `Visa` • `Zelle`

Field	Details
ReasonCode	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies a unique code that identifies the primary reason for a disputed transaction. Possible values are: • 4808 • 4834 • 4853 • 71
ReasonCodeName	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name associated with a reason code.
ReasonCodeSubtype	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the subtype of the reason code.
ReasonCodeType	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the type of the reason code.
ReasonCodeValidFromDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The start date of the validity of the reason code.

Field	Details
ReasonCodeValidToDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The end date of the validity of the reason code.
ReasonSubcode	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies a unique subcode that classifies a disputed transaction within a specific reason code. Possible values are: • 1 • 2 • 3 • 4 • 5 • 6 • 7
ReasonSubcodeName	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name associated with a reason subcode.

Associated Objects

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

DisputeReasonChangeEvent on page 1009
Change events are available for the object.

DisputeReasonFeed on page 1013
Feed tracking is available for the object.

DisputeReasonHistory on page 1021
History is available for tracked fields of the object.

DisputeReasonOwnerSharingRule on page 1026
Sharing rules are available for the object.

DisputeReasonShare on page 1029
Sharing is available for the object.

DisputeQueueJobRun

Represents a job that's run to fetch the details of the claims. This object is available in API version 61.0 and later.

Supported Calls

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

Fields

Field	Details
`EndDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time until when the job ran.
`FlowInterviewId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The Flow Interview that's associated with the dispute queue job run. This field is a relationship field. **Relationship Name** FlowInterview **Relationship Type** Lookup **Refers To** FlowInterview
`JobRunInformation`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The information about the job run, such as status, error message, and so on.
`QueueName`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the name of the queue from where the claims are retrieved. Possible values are: • `AcquirerWorked` • `Closed` • `IssuerRepresentmentUnworked` • `IssuerWorked` • `Pending` • `PendingDocumentation` • `Rejects` • `SenderCaseFiling`
`RetrievedClaimCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The number of claims that were retrieved in the job.
`RetrievedPageCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The number of pages that were retrieved in the job.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies the status of the job. Possible values are:

Field	Details
	• `Completed` • `Failed` • `Started`

Associated Objects

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

DisputeQueueJobRunChangeEvent on page 1009
Change events are available for the object.

DisputeQueueJobRunFeed on page 1013
Feed tracking is available for the object.

DisputeQueueJobRunHistory on page 1021
History is available for tracked fields of the object.

DisputeQueueJobRunOwnerSharingRule on page 1026
Sharing rules are available for the object.

DisputeQueueJobRunShare on page 1029
Sharing is available for the object.

DisputeItemQueueResponse

Represents the response received from the job that's run to fetch the claim details. This object is available in API version 61.0 and later.

Supported Calls

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

Fields

Field	Details
`DisputeItemId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The Dispute Item that's associated with the queue response. This field is a relationship field.

Field	Details
	Relationship Name DisputeItem **Relationship Type** Master-detail **Refers To** DisputeItem (the master object)
`DisputeQueueJobRunId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The Dispute Queue Job Run that's associated with the dispute item queue response. This field is a relationship field. **Relationship Name** DisputeQueueJobRun **Relationship Type** Lookup **Refers To** DisputeQueueJobRun
`QueueName`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The name of the queue that's the source of the response.
`QueueResponse`	**Type** textarea **Properties** Create, Nillable, Update **Description** The dispute item claim details received from a queue.
`ResponseProcessingStatus`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update

Field	Details
	Description Indicates whether the update received for a claim from the queue is processed (true) or not (false). Possible values are: • `Completed` • `In Progress`

Associated Objects

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

DisputeItemQueueResponseChangeEvent on page 1009
Change events are available for the object.

DisputeItemQueueResponseFeed on page 1013
Feed tracking is available for the object.

DisputeItemQueueResponseHistory on page 1021
History is available for tracked fields of the object.

DisputeItemQueueResponseOwnerSharingRule on page 1026
Sharing rules are available for the object.

DisputeItemQueueResponseShare on page 1029
Sharing is available for the object.

DistributorAuthorization

Represents the official authorization from an insurance company granting a distributor the permission to act as its agent. This object is available in API version 48.0 and later.

Supported Calls

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

Fields

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

Field	Details
	Description The ID of the distributor's business account.
AuthorizedInsuranceLineId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The insurance line that the insurance company is authorized to sell.
ContactId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the contact associated with the producer.
EffectiveDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date from which this authorization is in effect.
ExpirationDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date on which this authorization expires.
IsActive	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the authorization is active (true) or inactive (false). The default value is false.
LastReferencedDate	**Type** dateTime

Field	Details
	Properties Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`LicenseId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The distributor's business license against which the distributor is authorized.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** An auto-number identifier for this distributor authorization.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the record owner.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The authorization status of the distributor. Possible values are:

Field	Details
	• `Appointed` • `Terminated`
`TerminationCause`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The reason for the termination of the distributor's authorization.

Associated Objects

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

DistributorAuthorizationChangeEvent on page 1009
Change events are available for the object in API version 62.0 and later.

DistributorAuthorizationFeed on page 1013
Feed tracking is available for the object.

DistributorAuthorizationHistory on page 1021
History is available for tracked fields of the object.

DistributorAuthorizationOwnerSharingRule on page 1026
Sharing rules are available for the object.

DistributorAuthorizationShare on page 1029
Sharing is available for the object.

DocChkItemValidatedTarget

Represents the details of the document checklist item and the target object against which the document checklist item was validated. This object is available in API version 59.0 and later.

Supported Calls

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

Fields

Field	Details
`DocumentChecklistItemId`	**Type** reference

Field	Details
	Properties Create, Filter, Group, Sort **Description** The document checklist item against which a target reference object is validated. This field is a relationship field. **Relationship Name** DocumentChecklistItem **Relationship Type** Lookup **Refers To** DocumentChecklistItem
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the validation of the target reference object is active (true) or not (false). The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the Document Checklist Item Validated Target record.

Field	Details
`TargetReferenceObjectId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The object validated against a document checklist item. This field is a polymorphic relationship field. **Relationship Name** TargetReferenceObject **Relationship Type** Lookup **Refers To** IdentityDocument, PartyProfile, PartyProfileAddress, PartyProfileRisk, PartyScreeningSummary

Associated Objects

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

DocChkItemValidatedTargetChangeEvent on page 1009
Change events are available for the object.

DocChkItemValidatedTargetFeed on page 1013
Feed tracking is available for the object.

DocChkItemValidatedTargetHistory on page 1021
History is available for tracked fields of the object.

DocChkItemValidatedTargetOwnerSharingRule on page 1026
Sharing rules are available for the object.

DocChkItemValidatedTargetShare on page 1029
Sharing is available for the object.

DocumentCategory

Represents a document category that's used to group the document checklist items. This object is available in API version 59.0 and later.

Supported Calls

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

Fields

Field	Details
`Description`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The description for the document category.
`DeveloperName`	**Type** string **Properties** Filter, Group, Sort **Description** The developer name of the document category.
`Language`	**Type** picklist **Properties** Filter, Group, Restricted picklist, Sort **Description** The language of the document category.
`MasterLabel`	**Type** string **Properties** Filter, Group, idLookup, Sort **Description** The master label of the document category.
`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:

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'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 are 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.

DocumentCategoryDocumentType

Represents a junction between Document Category and Document Type. This object is available in API version 59.0 and later.

Supported Calls

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

Fields

Field	Details
`DeveloperName`	**Type** string **Properties** Filter, Group, Sort **Description** The unique name of the object in the API. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization. Note: When creating large sets of data, always specify a unique DeveloperName for each record. If no DeveloperName is specified, performance slows down while Salesforce generates one for each record.
`DocumentCategoryId`	**Type** reference **Properties** Filter, Group, Sort

Field	Details
	Description The Document Category associated with this record. This field is a relationship field. **Relationship Name** DocumentCategory **Relationship Type** Lookup **Refers To** DocumentCategory
`DocumentTypeId`	**Type** reference **Properties** Filter, Group, Sort **Description** The Document Type associated with this record This field is a relationship field. **Relationship Name** DocumentType **Relationship Type** Lookup **Refers To** DocumentType
`Language`	**Type** picklist **Properties** Filter, Group, Restricted picklist, Sort **Description** The language of the document category.
`MasterLabel`	**Type** string **Properties** Filter, Group, idLookup, Sort **Description** The label for the picklist value that appears in the UI.
`NamespacePrefix`	**Type** string

Field	Details
	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 are 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.

DocumentChecklistItem

Represents a checklist item for a file documentation upload. This object is available in API version 47.0 and later.

Supported Calls

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

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Filter, Group, Nillable, Sort **Description** Read only. The ID of the account the document checklist item belongs to. The value of the field is set internally using the ParentRecordId field.
`Comments`	**Type** textarea **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description Comments added when validating a target reference object against the document checklist item. This field is available only if you have enabled Integrated Onboarding for Financial Services Cloud.
`DocumentCategoryId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The document category related to the document checklist item. This field is available only if you have enabled Integrated Onboarding for Financial Services Cloud. This field is a relationship field.
`DocumentTypeId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the document type for the document checklist item.
`Instruction`	**Type** textarea **Properties** Create, Nillable, Update **Description** Instructions associated with the document checklist item.
`IsAccepted`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the file has been accepted. The default value is False.
`IsFrozen`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates that the item can no longer be modified. The default value is False.

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

Field	Details
	Description Original parent object the document checklist item belonged to.
`ReceivedDocumentId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** This field is a relationship field. **Relationship Name** ReceivedDocument **Relationship Type** Lookup **Refers To** ReceivedDocument
`Status`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Uploaded document checklist item status. Possible values are: • `Accepted` • `New` • `Pending` • `Waived` • `Not Verified` • `Rejected` The default value is New.
`UploadedById`	**Type** reference **Properties** Filter, Group, Nillable, Sort **Description** Person who uploaded the file.
`ValidatedById`	**Type** reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The user who validated the target reference object against the document checklist item. This field is available only if you have enabled Integrated Onboarding for Financial Services Cloud.
`ValidationDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time when the target reference object was validated. This field is available only if you have enabled Integrated Onboarding for Financial Services Cloud.
`WhoId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Person that the uploaded documentation pertains to.

Associated Objects

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

DocumentChecklistItemChangeEvent on page 1009
Change events are available for the object.

DocumentChecklistItemFeed
Feed tracking is available for the object.

DocumentChecklistItemHistory
History is available for tracked fields of the object.

DocumentChecklistItemOwnerSharingRule
Sharing rules are available for the object.

DocumentChecklistItemShare
Sharing is available for the object.

DocumentType

Represents the type of file being uploaded or attached. This object is available in API version 47.0 and later.

Supported Calls

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

Fields

Field	Details
`Description`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description for the document category.
`DeveloperName`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The unique name of the object in the API. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization. Note: When creating large sets of data, always specify a unique `DeveloperName` for each record. If no `DeveloperName` is specified, performance slows down while Salesforce generates one for each record.
`ExternalIdentifier`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The unique identifier for the document type in an external system. This field is available only if you have enabled Integrated Onboarding for Financial Services Cloud.
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the document type is active.

Field	Details
Language	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The language of the document type.
MasterLabel	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The label for the picklist value that appears in the UI.
MaximumFileSize	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the maximum file size in MB for each document checklist item. This field is available only if you have enabled Integrated Onboarding for Financial Services Cloud.
MaximumFileUploadCount	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the maximum number of file uploads allowed for a document category. This field is available only if you have enabled Integrated Onboarding for Financial Services Cloud.
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

Field	Details
	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 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.

FinancialAccount

Represents information about different financial accounts, such as investment accounts, bank accounts, and credit cards. This object is available in API version 61.0 and later.

Supported Calls

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

Special Access Rules

This is a standard object and is available only when you turn on the Financial Account Management Standard Objects setting.

Fields

Field	Details
`BankerId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The person who originated the financial account. This field is a relationship field. **Relationship Name** Banker **Relationship Type** Lookup **Refers To** Banker
`BranchUnitId`	**Type** reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The bank branch or financial institute to which the financial account is associated with. This field is a relationship field. **Relationship Name** BranchUnit **Relationship Type** Lookup **Refers To** BranchUnit
`ClosingDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the financial account was closed.
`CreditLimit`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The total credit limit available for the financial account.
`DownPaymentAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** An initial up-front partial payment amount.
`FinancialAccountNumber`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The identifier of the financial account.

Field	Details
`InsurancePaidYearToDate`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The total amount of insurance premium paid in the current tax year.
`InterestPaidYearToDate`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The total amount of interest paid in the current tax year.
`InterestRate`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The interest rate of the financial account.
`InterestType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the type of interest. For example, fixed and variable. Possible values are: • `Fixed` • `Variable`
`IsHeldAway`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether this financial account is owned externally (true) or in-house (false). The default value is `false`.
`IsOverdraftAllowed`	**Type** boolean

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the financial account allows an overdraft (true) or not (false). The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date when a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date when a user viewed this record.
`MaturityDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the financial account with a fixed term matures.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the financial account.
`OpeningDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the financial account was opened.

Field	Details
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The owner of the financial account record. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`PaymentDueDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the payment is due for the financial account.
`PrincipalAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The principal amount on the financial account.
`PrincipalPaidYearToDate`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The total amount paid against the principal in the current tax year.
`ProductId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The product associated with the financial account.

Field	Details
	This field is a relationship field. **Relationship Name** Product **Relationship Type** Lookup **Refers To** Product2
PropertyTaxPaidYearToDate	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The total amount of property tax paid in the current tax year.
RelatedFinancialAccountId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The parent of the financial account. This field is a relationship field. **Relationship Name** RelatedFinancialAccount **Relationship Type** Lookup **Refers To** FinancialAccount
RenewalDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the financial account is due for renewal.
SourceSystemIdentifier	**Type** external lookup **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update

Field	Details
	Description The identifier of the financial account in an external system such as, a core banking system.
`Status`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Sort, Update **Description** Specifies the status of the financial account. Possible values are: • `Active` • `Closed` • `Delinquent` • `On Hold` The default value is `Active`.
`Term`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The term of the financial account.
`TotalOutstandingAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The total outstanding amount on the financial account.
`Type`	**Type** picklist **Properties** Create, Filter, Group, Sort, Update **Description** The type of financial account. Possible values are: • `Automotive Lease` • `Automotive Loan`

Usage

Associated Objects

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

FinancialAccountChangeEvent on page 1009
Change events are available for the object.

FinancialAccountFeed on page 1013
Feed tracking is available for the object.

FinancialAccountHistory on page 1021
History is available for tracked fields of the object.

FinancialAccountOwnerSharingRule on page 1026
Sharing rules are available for the object.

FinancialAccountShare on page 1029
Sharing is available for the object.

FinancialAccountAddress

Represents information about each address related to a financial account, such as communication address, billing address, and statement address. This object is available in API version 61.0 and later.

Supported Calls

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

Special Access Rules

This is a standard object and is available only when you turn on the Financial Account Management Standard Objects setting.

Fields

Field	Details
`ActiveFromDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date from when the address is active for the financial account.

Field	Details
`ActiveToDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date from when the address stops being active for the financial account.
`Address`	**Type** address **Properties** Filter **Description** The address of the financial account.
`City`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The city related to a financial account's address.
`Country`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The country related to a financial account's address.
`FinancialAccountId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The financial account related to an address. This field is a relationship field. **Relationship Name** FinancialAccount **Relationship Type** Lookup **Refers To** FinancialAccount

Field	Details
GeocodeAccuracy	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The level of accuracy of a location's geographical coordinates compared with its physical address. A geocoding service typically provides this value based on the milestone location's latitude and longitude coordinates. Possible values are: • Address • Block • City • County • ExtendedZip—Extended Zip • NearAddress—Near Address • Neighborhood • State • Street • Unknown • Zip
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date when a user referenced this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date when a user viewed this record.
Latitude	**Type** double **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description The latitude related to a financial account's address.
`Longitude`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The longitude related to a financial account's address.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of this record.
`PostalCode`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The postal code related to a financial account's address.
`SourceSystemIdentifier`	**Type** external lookup **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** The unique identifier of this record in an external system.
`State`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The state related to a financial account's address.
`Street`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The street related to a financial account's address.
`Type`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the address type of the financial account. Possible values are: • `Billing Address` • `Communication Address` • `Statement Address`

Associated Objects

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

FinancialAccountAddressChangeEvent on page 1009
Change events are available for the object.

FinancialAccountAddressFeed on page 1013
Feed tracking is available for the object.

FinancialAccountAddressHistory on page 1021
History is available for tracked fields of the object.

FinancialAccountAddressOwnerSharingRule on page 1026
Sharing rules are available for the object.

FinancialAccountAddressShare on page 1029
Sharing is available for the object.

FinancialAccountBalance

Represents information about different balances of a financial account. This object is available in API version 61.0 and later.

Supported Calls

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

Special Access Rules

This is a standard object and is available only when you turn on the Financial Account Management Standard Objects setting.

Fields

Field	Details
`Amount`	**Type** currency **Properties** Filter, Nillable, Sort **Description** The balance in the financial account.
`BalanceAsOfDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the balance was last retrieved from an external data source.
`FinancialAccountId`	**Type** reference **Properties** Filter, Group, Sort **Description** The financial account related to the balance. This field is a relationship field. **Relationship Name** FinancialAccount **Relationship Type** Lookup **Refers To** FinancialAccount
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date when a user referenced this record.

Field	Details
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date when a user viewed this record.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the record.
`OwnerId`	**Type** reference **Properties** Filter, Group, Sort **Description** The owner of this record. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`SourceSystemIdentifier`	**Type** external lookup **Properties** Filter, Group, idLookup, Nillable, Sort **Description** The unique identifier of this record in an external system.
`Type`	**Type** picklist **Properties** Filter, Group, Sort **Description** Specifies the type of balance in the financial account.

Field	Details
	Possible values are: • `Available Credit` • `Current Posted Balance` • `Lease Balance` • `Principal Balance` • `Total Balance`

Associated Objects

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

FinancialAccountBalanceChangeEvent on page 1009
Change events are available for the object.

FinancialAccountBalanceFeed on page 1013
Feed tracking is available for the object.

FinancialAccountBalanceHistory on page 1021
History is available for tracked fields of the object.

FinancialAccountBalanceOwnerSharingRule on page 1026
Sharing rules are available for the object.

FinancialAccountBalanceShare on page 1029
Sharing is available for the object.

FinancialAccountFee

Represents information about the fee that's applicable on the financial account to service various requests, such as a request for stop payment, duplicate card, and more. This object is available in API version 61.0 and later.

Supported Calls

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

Special Access Rules

This is a standard object and is available only when you turn on the Financial Account Management Standard Objects setting.

Fields

Field	Details
`Amount`	**Type** currency **Properties** Filter, Nillable, Sort **Description** The amount that is charged for the request.
`EndDate`	**Type** date **Properties** Filter, Group, Nillable, Sort **Description** The date until when the applicable fee is charged on the financial account.
`FinancialAccountId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The financial account to which the fee is charged. This field is a relationship field. **Relationship Name** FinancialAccount **Relationship Type** Lookup **Refers To** FinancialAccount
`Frequency`	**Type** picklist **Properties** Filter, Group, Nillable, Sort **Description** The frequency at which the applicable fee is charged on the financial account. Possible values are: • `Monthly` • `One Time` • `Yearly`

Field	Details
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date when a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date when a user viewed this record.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the record.
`Rate`	**Type** percent **Properties** Filter, Nillable, Sort **Description** The amount in percentage that is charged for the request.
`SourceSystemIdentifier`	**Type** external lookup **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** The unique identifier of the financial account fee in an external system.
`StartDate`	**Type** date **Properties** Filter, Group, Nillable, Sort **Description** The date from when the applicable fee is charged on the financial account.

Field	Details
`Type`	**Type** picklist **Properties** Defaulted on create, Filter, Group, Nillable, Sort **Description** Specifies the type of the financial account fee, such as stop payment fee, new check book fee, duplicate card fee, and more. Possible values are: • `Duplicate Card Fee` • `New Cheque Book Fee` • `Stop Payment Fee` The default value is `Stop Payment Fee`.

Associated Objects

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

FinancialAccountFeeChangeEvent on page 1009
Change events are available for the object.

FinancialAccountFeeFeed on page 1013
Feed tracking is available for the object.

FinancialAccountFeeHistory on page 1021
History is available for tracked fields of the object.

FinancialAccountFeeOwnerSharingRule on page 1026
Sharing rules are available for the object.

FinancialAccountFeeShare on page 1029
Sharing is available for the object.

FinancialAccountParty

Represents the role played by a person or organization involved with a financial account, such as a beneficiary, owner, and a trustee. This object is available in API version 61.0 and later.

Supported Calls

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

Special Access Rules

This is a standard object and is available only when you turn on the Financial Account Management Standard Objects setting.

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The account related to a financial account. This field is a relationship field. **Relationship Name** Account **Relationship Type** Lookup **Refers To** Account
`ContactId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The contact related to the financial account. This field is a relationship field. **Relationship Name** Contact **Relationship Type** Lookup **Refers To** Contact
`FinancialAccountId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The financial account associated with the party. This field is a relationship field.

Field	Details
	Relationship Name FinancialAccount **Relationship Type** Lookup **Refers To** FinancialAccount
`IsRoleActive`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort **Description** Indicates whether the party role is active (true) or not (false). The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date when a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date when a user viewed this record.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the record.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	Description The owner of the record. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`Role`	**Type** picklist **Properties** Create, Filter, Group, Sort, Update **Description** Specifies the role of the party in relation to a financial account. Possible values are: • `Beneficiary` • `Driver` • `Leasee` • `Owner`
`RoleEndDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the party, such as an organization or contact relinquished the role.
`RoleStartDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the party, such as an organization or contact assumed the role.
`SourceSystemIdentifier`	**Type** external lookup **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update

Field	Details
	Description The unique identifier of this record in an external system.

Associated Objects

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

FinancialAccountPartyChangeEvent on page 1009
Change events are available for the object.

FinancialAccountPartyFeed on page 1013
Feed tracking is available for the object.

FinancialAccountPartyHistory on page 1021
History is available for tracked fields of the object.

FinancialAccountPartyOwnerSharingRule on page 1026
Sharing rules are available for the object.

FinancialAccountPartyShare on page 1029
Sharing is available for the object.

FinclAcctPtyFinclAsset

Represents information about a party asset associated with a financial account. This object is available in API version 61.0 and later.

Supported Calls

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

Special Access Rules

This is a standard object and is available only when you turn on the Financial Account Management Standard Objects setting.

Fields

Field	Details
`AssociationEndDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the party asset's association ends with the financial account.

Field	Details
`AssociationStartDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the party asset was associated with the financial account.
`AssociationType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the type of association between the financial account and the party asset. Possible values are: • `Collateral` • `Trade In`
`FinancialAccountId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The financial account associated with the party asset. This field is a relationship field. **Relationship Name** FinancialAccount **Relationship Type** Lookup **Refers To** FinancialAccount
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date when a user referenced this record.
`LastViewedDate`	**Type** dateTime

Field	Details
	Properties Filter, Nillable, Sort **Description** The most recent date when a user viewed this record.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the record.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The owner of this record. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`PartyFinancialAssetId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The party asset associated with the financial account. This field is a relationship field. **Relationship Name** PartyFinancialAsset **Relationship Type** Lookup **Refers To** PartyFinancialAsset

Field	Details
`PledgedAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The monetary value of the asset pledged as the collateral for the associated financial account.
`SourceSystemIdentifier`	**Type** external lookup **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** The unique identifier of the financial account party asset in an external system.

Associated Objects

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

FinclAcctPtyFinclAssetChangeEvent on page 1009
Change events are available for the object.

FinclAcctPtyFinclAssetFeed on page 1013
Feed tracking is available for the object.

FinclAcctPtyFinclAssetHistory on page 1021
History is available for tracked fields of the object.

FinclAcctPtyFinclAssetOwnerSharingRule on page 1026
Sharing rules are available for the object.

FinclAcctPtyFinclAssetShare on page 1029
Sharing is available for the object.

FinancialAccountStatement

Represents information about a financial account statement. This object is available in API version 61.0 and later.

Supported Calls

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

Special Access Rules

This is a standard object and is available only when you turn on the Financial Account Management Standard Objects setting.

Fields

Field	Details
`Description`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description of the financial account statement.
`EndDate`	**Type** date **Properties** Create, Filter, Group, Sort, Update **Description** Indicates the end date of the financial account statement period.
`FinancialAccountId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The financial account associated with the financial account statement. This field is a relationship field. **Relationship Name** FinancialAccount **Relationship Type** Lookup **Refers To** FinancialAccount
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date when a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort

Field	Details
	Description The most recent date when a user viewed this record.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the record.
`SourceSystemIdentifier`	**Type** external lookup **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** The unique identifier of the financial account statement in an external system.
`StartDate`	**Type** date **Properties** Create, Filter, Group, Sort, Update **Description** Indicates the start date of the financial account statement period.
`Type`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the statement type. Possible values are: • `Account Closure Statement` • `Balance Statement` • `Periodic Statement`
`Url`	**Type** url **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The URL of the statement attachment or file.

Associated Objects

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

FinancialAccountStatementChangeEvent on page 1009
Change events are available for the object.

FinancialAccountStatementFeed on page 1013
Feed tracking is available for the object.

FinancialAccountStatementHistory on page 1021
History is available for tracked fields of the object.

FinancialAccountStatementOwnerSharingRule on page 1026
Sharing rules are available for the object.

FinancialAccountStatementShare on page 1029
Sharing is available for the object.

FinancialAccountTransaction

Represents information about the transactions associated with a financial account. This object is available in API version 61.0 and later.

Supported Calls

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

Special Access Rules

This is a standard object and is available only when you turn on the Financial Account Management Standard Objects setting.

Fields

Field	Details
`Amount`	**Type** currency **Properties** Create, Filter, Sort, Update **Description** The transaction amount.
`DebitCreditIndicator`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update

Field	Details
	Description Specifies whether the transaction is of type Credit or Debit. For example, money deposited to a Checking or Savings account is of type Credit, and money withdrawn from a deposit account is of type Debit. Possible values are: • `Credit` • `Debit`
`Description`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The transaction description.
`FinancialAccountId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The financial account related to the transaction. This field is a relationship field. **Relationship Name** FinancialAccount **Relationship Type** Lookup **Refers To** FinancialAccount
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date when a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort

Field	Details
	Description The most recent date when a user viewed this record.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the record.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The owner of this record. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`PostedDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date when the transaction was posted to the financial account.
`SourceSystemIdentifier`	**Type** external lookup **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** The unique identifier of the financial account transaction in an external system.
`Status`	**Type** picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the status of the transaction. Possible values are: • `Booked` • `Pending`
`SubType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the sub type of the transaction.
`TransactionCode`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The identifier of the transaction.
`TransactionDate`	**Type** dateTime **Properties** Create, Filter, Sort, Update **Description** The date and time of the transaction.
`TransactionIdentifier`	**Type** text **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** The identifier of the transaction.
`Type`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Specifies the type of the transaction.

Associated Objects

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

FinancialAccountTransactionChangeEvent on page 1009
Change events are available for the object.

FinancialAccountTransactionFeed on page 1013
Feed tracking is available for the object.

FinancialAccountTransactionHistory on page 1021
History is available for tracked fields of the object.

FinancialAccountTransactionOwnerSharingRule on page 1026
Sharing rules are available for the object.

FinancialAccountTransactionShare on page 1029
Sharing is available for the object.

FinancialDeal

Represents the deal that the financial institution is working on. 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
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The account ID of the customer who engaged the financial institution in this deal. This is a relationship field. **Relationship Name** Account

Field	Details
	Relationship Type Lookup **Refers To** Account
`CloseProbability`	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** The probability of the deal being successfully closed.
`ConfidentialityType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the level of confidentiality of the information that's recorded in the financial deal. Possible values are: • `Confidential` • `Public`
`ConflictStatus`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the status of the conflict clearance for the financial deal. Possible values are: • `Approved` • `Declined`
`Description`	**Type** textarea **Properties** Create, Nillable, Update **Description** The description of the deal.
`ExpectedCloseDate`	**Type** date

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The date when the deal is expected to close.
`FinancialDealCode`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** A unique code that identifies the deal.
`FinancialDealType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The type of the deal. Possible values are: • `Advisory` • `Capital Raising` • `Debt Capital Market` • `Initial Public Offering` • `Mergers and Acquisitions` • `Secondary Offering`
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.

Field	Details
MandatedDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the financial deal was mandated.
Name	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the financial deal.
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the user who created the relationship record. This is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
ParentFinancialDealId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The parent financial deal. This is a relationship field. **Relationship Name** ParentFinancialDeal **Relationship Type** Lookup **Refers To** FinancialDeal

Field	Details
`ReceivedFee`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The total fee received by the financial institution until the current date.
`Role`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The role that the financial institution plays in this deal. Possible values are: • `Advisor` • `Bookrunner` • `Syndication Agent`
`Stage`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the stage of the deal. Possible values are: • `Closed` • `Execution` • `Mandate` • `Pitch`
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the status of the deal. Possible values are: • `Closed` • `On Hold` • `Open`

Field	Details
TotalExpectedFee	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The total fee expected by the financial institution until the current date.
TotalExpense	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The total expense incurred for the financial deal until the current date.
TransactionValue	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The total transaction value of the financial deal.

Associated Objects

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

FinancialDealChangeEvent on page 1009
Change events are available for the object.

FinancialDealFeed on page 1013
Feed tracking is available for the object.

FinancialDealHistory on page 1021
History is available for tracked fields of the object.

FinancialDealOwnerSharingRule on page 1026
Sharing rules are available for the object.

FinancialDealShare on page 1029
Sharing is available for the object.

FinancialDealAsset

Represents the assets included in the financial deal. This object is available in API version 54.0 and later.

Supported Calls

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

Fields

Field	Details
`Address`	**Type** address **Properties** Filter, Nillable **Description** The location of the asset. This is a compound field of type Address and combines these fields: City, Country, GeocodeAccuracy, Latitude, Longitude, PostalCode, State, and Street. For more information, see Address Compound Fields.
`AssetId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The asset involved in the financial deal. This is a relationship field. **Relationship Name** Asset **Relationship Type** Lookup **Refers To** Asset
`AssetType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the type of asset. Possible values are: • `Office Space` • `Residential Space`

Field	Details
FinancialDealId	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The financial deal associated with the financial deal asset record. This is a relationship field. **Relationship Name** FinancialDeal **Relationship Type** Lookup **Refers To** FinancialDeal
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
Name	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the financial deal asset record.
UnitCount	**Type** double **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description The total number of units.
`UnitOfMeasureId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The unit of measure for the asset. This is a relationship field. **Relationship Name** UnitOfMeasure **Relationship Type** Lookup **Refers To** UnitOfMeasure

Associated Objects

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

FinancialDealAssetChangeEvent
Change events are available for the object.

FinancialDealAssetFeed **on page 1013**
Feed tracking is available for the object.

FinancialDealAssetHistory **on page 1021**
History is available for tracked fields of the object.

FinancialDealBid

Represents the bids placed by financial deal parties in the financial deal. This object is available in API version 54.0 and later.

Supported Calls

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

Fields

Field	Details
BidAmount	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The amount that the financial deal party is willing to pay for the bid.
BidDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date on which the bid has been placed by the financial deal party.
BidRound	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The bidding round in which the bid has been placed by the financial deal party.
FinancialDealId	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The financial deal associated with the financial deal bid record. This is a relationship field. **Relationship Name** FinancialDeal **Relationship Type** Lookup **Refers To** FinancialDeal
FinancialDealPartyId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The financial deal party who's making the bid. This is a relationship field. **Relationship Name** FinancialDealParty **Relationship Type** Lookup **Refers To** FinancialDealParty
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the financial deal bid record.

Associated Objects

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

FinancialDealBidChangeEvent on page 1009
Change events are available for the object.

FinancialDealBidFeed on page 1013
Feed tracking is available for the object.

FinancialDealBidHistory on page 1021
History is available for tracked fields of the object.

FinancialDealInteraction

Represents a junction between an interaction and a financial deal. 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()`

Fields

Field	Details
`Comment`	**Type** textarea **Properties** Create, Nillable, Update **Description** Notes about the financial deal associated with the interaction.
`FinancialDealId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The financial deal associated with the interaction. This is a relationship field. **Relationship Name** FinancialDeal **Relationship Type** Lookup **Refers To** FinancialDeal
`InteractionId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The interaction associated with the financial deal interaction record.

Field	Details
	This is a relationship field. **Relationship Name** Interaction **Relationship Type** Lookup **Refers To** Interaction
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
Name	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the financial deal interaction record.

Associated Objects

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

FinancialDealInteractionChangeEvent on page 1009
Change events are available for the object.

FinancialDealInteractionFeed on page 1013
Feed tracking is available for the object.

FinancialDealInteractionHistory on page 1021
History is available for tracked fields of the object.

FinancialDealParty

Represents the parties, such as partners and competitors, that are involved in the deal. 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
`ContactId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The contact ID of the party. This is a relationship field. **Relationship Name** Contact **Relationship Type** Lookup **Refers To** Contact
`PartyType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The type of the party. Possible values are: • `Company` • `Individual`
`FinancialDealId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The deal that's shared with the participant. This is a relationship field. **Relationship Name** FinancialDeal **Relationship Type** Lookup **Refers To** FinancialDeal
`LastReferencedDate`	**Type** dateTime **Properties** Aggregate, Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastStageChangeDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The date of the last change made to the `Stage` field on this financial deal party record. This field is available in API version 54.0.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the party that's involved in the deal.

Field	Details
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the user who created the relationship record. This is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`PartyId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The account ID of the party. This is a relationship field. **Relationship Name** Party **Relationship Type** Lookup **Refers To** Account
`PartyRole`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The party's role in the deal. Possible values are: • `Competitor` • `Partner` • `Syndicate`

Field	Details
Stage	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The current stage of the party involved with the financial deal. Possible values are: • Confidential Information Memorandum Sent • Declined • Indication of Interest Sent • Letter of Intent Sent • Non-Disclosure Agreement Signed • Teaser Sent

Associated Objects

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

FinancialDealPartyChangeEvent on page 1009
Change events are available for the object.

FinancialDealPartyFeed on page 1013
Feed tracking is available for the object.

FinancialDealPartyHistory on page 1021
History is available for tracked fields of the object.

FinancialDealPartyOwnerSharingRule on page 1026
Sharing rules are available for the object.

FinancialDealPartyShare on page 1029
Sharing is available for the object.

FinancialDealParticipant

Represents the user or the group with whom the deal is shared. This object is available in API version 52.0 and later.

Supported Calls

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

Fields

Field	Details
`Comments`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Notes about the deal participant.
`FinancialDealId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The deal that's shared with the participant. This is a relationship field. **Relationship Name** FinancialDeal **Relationship Type** Lookup **Refers To** FinancialDeal
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the deal participant is active. The default value is 'false'.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime

Field	Details
	Properties Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** An auto-generated number assigned to this record.
`ParticipantId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The user or group that the deal is shared with. This is a polymorphic relationship field. **Relationship Name** Participant **Relationship Type** Lookup **Refers To** Group, User
`ParticipantRoleId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The role assigned to the participant. This is a relationship field. **Relationship Name** ParticipantRole **Relationship Type** Lookup **Refers To** ParticipantRole

Associated Objects

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

FinancialDealParticipantChangeEvent on page 1009
Change events are available for the object.

FinancialDealParticipantFeed on page 1013
Feed tracking is available for the object.

FinancialDealParticipantHistory on page 1021
History is available for tracked fields of the object.

FinancialDealProduct

Represents the products (services) offered by the bank in the deal. 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
`Fee`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The fee charged by the bank for the product
`FinancialDealId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The financial deal that the product or service is associated with. This is a relationship field. **Relationship Name** FinancialDeal **Relationship Type** Lookup

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

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The product (service) provided by the bank in the deal. This is a relationship field. **Relationship Name** Product **Relationship Type** Lookup **Refers To** Product2

Associated Objects

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

FinancialDealProductChangeEvent on page 1009
Change events are available for the object.

FinancialDealProductFeed on page 1013
Feed tracking is available for the object.

FinancialDealProductHistory on page 1021
History is available for tracked fields of the object.

FinancialDealProductOwnerSharingRule on page 1026
Sharing rules are available for the object.

FinancialDealProductShare on page 1029
Sharing is available for the object.

FinancialGoal

This Financial Goal object is a standard Salesforce object. It represents a financial goal for a person account. This object is available in API version 59.0 and later.

Supported Calls

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

Fields

Field	Details
`ActualAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The current amount saved toward the goal.
`Category`	**Type** picklist **Properties** Create, Filter, Group, Sort, Update **Description** Specifies the category of the goal. This field is available in API version 60.0 and later. Possible values are: • `Expenditure` • `Capital`
`CompletionDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the financial goal is reached.
`CurrencyIsoCode`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** If multiple currencies is enabled, contains the currency ISO code associated with the record.
`Description`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description of the financial goal.

Field	Details
EstimatedSuccessPercent	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** The estimated success percentage of the financial goal. This field is available in API version 60.0 and later.
FinancialPlanId	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** ID of the user who created the record. The ID of the financial plan associated with the financial goal. This field is available in API version 60.0 and later. **Relationship Name** FinancialPlan **Relationship Type** Lookup **Refers To** FinancialPlan
InitialAmount	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The initial amount saved toward the goal.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort

Field	Details
	Description The most recent date on which a user viewed this record.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the financial goal.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the user who created the record. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`Priority`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the priority of the goal. Possible values are: • `HIGH` • `LOW` • `MEDIUM`
`SourceSystemIdentifier`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The unique identifier for the financial goal in an external system.

Field	Details
StartDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The start date of the financial goal.
Status	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies the status of the financial goal. Possible values are: • COMPLETED • IN_PROGRESS • NOT_STARTED
TargetAmount	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The amount required to reach the goal.
TargetDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the financial goal is expected to be reached.
Type	**Type** picklist **Properties** Create, Filter, Group, Sort, Update **Description** Specifies the type of financial goal. Possible values are: • Education

Field	Details
	• `Emergency` • `Home` • `Other` • `Pay off Debt` • `Retirement` • `Vacation` • `Vehicle`
`WithdrawalFrequency`	**Type** picklist **Properties** Create, Filter, Group, Sort, Update **Description** The frequency at which the money is withdrawn. This field is available in API version 60.0 and later. Possible values are: • `Monthly` • `Weekly` • `Annually`

Associated Objects

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

financialgoalChangeEvent on page 1009
Change events are available for the object.

FinancialGoalHistory on page 1021
History is available for tracked fields of the object.

FinancialGoalOwnerSharingRule on page 1026
Sharing rules are available for the object.

FinancialGoalShare on page 1029
Sharing is available for the object.

FinancialGoalFunding

The financial goal of an individual or person account that requires funding. This object is available in API version 59.0 and later.

Supported Calls

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

Fields

Field	Details
`Amount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The amount contributed to the financial goal.
`FinancialGoalId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The financial goal of an individual or person account that requires funding. This field is a relationship field. **Relationship Name** FinancialGoal **Relationship Type** Lookup **Refers To** FinancialGoal
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the record.

Associated Objects

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

FinancialGoalFundingChangeEvent on page 1009
Change events are available for the object.

FinancialGoalParty

Represents a junction between the financial goal and the person account. This object is available in API version 59.0 and later.

Supported Calls

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

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The account to which the financial goal party is associated. This field is a relationship field. **Relationship Name** Account **Relationship Type** Lookup **Refers To** Account
`FinancialGoalId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The financial goal to which the financial goal party is associated. This field is a relationship field. **Relationship Name** FinancialGoal **Relationship Type** Lookup **Refers To** FinancialGoal
`Name`	**Type** string

Field	Details
	Properties Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the financial goal party.

FinancialPlan

Represents a financial plan for a person account. This object is available in API version 59.0 and later.

Supported Calls

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

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The household to which the financial plan is associated. This field is a relationship field. **Relationship Name** Account **Relationship Type** Lookup **Refers To** Account
`Description`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description of the financial plan.

Field	Details
`EstimatedSuccessPercent`	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** The success percentage that's estimated for the financial plan.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the financial plan.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the user who created the record. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`SourceSystemIdentifier`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The unique identifier for the financial plan in an external system.
`StartDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The start date of the financial plan.

Field	Details
`Status`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies the status of the finanical plan. Possible values are: • `Completed` • `InProgress`—In Progress • `NotStarted`—Not Started
`Type`	**Type** picklist **Properties** Create, Filter, Group, Sort, Update **Description** Specifies the type of financial plan. Possible values are: • `Education` • `Other` • `Retirement`

FinAssetPortfolioTgtAlloc

Stores target asset allocation for a financial account, person account, or household. This object is available in API version 62.0 and later.

Supported Calls

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

Fields

Field	Details
`ActualAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description Represents the actual amount of all assets.
`ActualLastUpdated`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** Represents the last updated time of the Actual Percent.
`ActualPercent`	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** Represents the actual allocation percentage of all assets.
`AssetClass`	**Type** picklist **Properties** Create, Filter, Group, Sort, Update **Description** Defines the major category of the asset type.
`AssetSubclass`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Defines the subclass of the asset class.
`Description`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Describes the asset allocation.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort

Field	Details
	Description The most recent date when a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date when a user viewed this record.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Name of the asset portfolio target allocation.
`NegativeTolerance`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Represents the allowed amount the actual allocation can be below the target, by rule.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** This field is a relationship field. **Relationship Name** Owner **Refers To** User
`PositiveTolerance`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Represents the allowed amount the actual allocation can be above the target, by rule.

Field	Details
`Sector`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Represents a group of stocks that have a lot in common.
`TargetId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** Associates the target object with the asset allocation. This field is a polymorphic relationship field. **Relationship Name** Target **Refers To** Account, FinancialAccount
`TargetPercent`	**Type** percent **Properties** Create, Filter, Sort, Update **Description** Represents the target allocation for the asset classification category.
`VarianceAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Represents the difference between the Target and Actual Amount.
`VariancePercent`	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** Represents the difference between the Target Percent and Actual Percent.

Associated Objects

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

FinAssetPortfolioTgtAllocChangeEvent on page 1009
Change events are available for the object.

FinAssetPortfolioTgtAllocFeed on page 1013
Feed tracking is available for the object.

FinAssetPortfolioTgtAllocHistory on page 1021
History is available for tracked fields of the object.

FinAssetPortfolioTgtAllocShare on page 1029
Sharing is available for the object.

FinancialSecurity

Represents information about a financial security instrument, such as stocks and bonds. This object is available in API version 61.0 and later.

Supported Calls

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

Special Access Rules

This is a standard object and is available only when you turn on the Financial Account Management Standard Objects setting.

Fields

Field	Details
`AnnualHigh`	**Type** currency **Properties** Filter, Nillable, Sort **Description** Highest price in the last 52 weeks.
`AnnualLow`	**Type** currency **Properties** Filter, Nillable, Sort **Description** Lowest price in the last 52 weeks.

Field	Details
`AssetClass`	**Type** picklist **Properties** Filter, Group, Nillable, Sort **Description** Specifies the asset class.
`AssetSubclass`	**Type** picklist **Properties** Filter, Group, Nillable, Sort **Description** Specifies the subclass of the Equities asset class.
`ClosePrice`	**Type** currency **Properties** Filter, Nillable, Sort **Description** The last price when a security trades during a regular trading day.
`CurrencyIsoCode`	**Type** picklist **Properties** Filter, Sort **Description** ISO code of the currency.
`EarningsPerShare`	**Type** double **Properties** Filter, Nillable, Sort **Description** Company's net income divided by its outstanding shares of common stock.
`EquityCategory`	**Type** picklist **Properties** Filter, Group, Nillable, Sort **Description** Specifies the market capitalization and investing style.

Field	Details
ExDividendDate	**Type** date **Properties** Filter, Group, Nillable, Sort **Description** Trading date on (and after) where the dividend isn't owed to a new buyer.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date when a user referenced this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date when a user viewed this record.
MarketCap	**Type** currency **Properties** Filter, Nillable, Sort **Description** Total value of a company's outstanding shares of stock.
MarketValue	**Type** currency **Properties** Filter, Nillable, Sort **Description** The current market value of the securities.
MarketValueDateTime	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the market value was recorded.

Field	Details
Name	**Type** string **Properties** Filter, Group, idLookup, Sort **Description** The name that uniquely identifies the securities.
OpenPrice	**Type** currency **Properties** Filter, Nillable, Sort **Description** Price when the security first trades at the opening of the day.
OwnerId	**Type** reference **Properties** Filter, Group, Sort **Description** The owner of this record. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
PeRatio	**Type** double **Properties** Filter, Nillable, Sort **Description** Price-Earnings Ratio of the security.
ProjectedDividend	**Type** currency **Properties** Filter, Nillable, Sort **Description** Projected dividend payment.

Field	Details
`ProjectedDividendYield`	**Type** percent **Properties** Filter, Nillable, Sort **Description** Projected dividend payment divided by the current stock price.
`Sector`	**Type** picklist **Properties** Filter, Group, Nillable, Sort **Description** Group of related or common stocks.
`SecurityIdentifier`	**Type** external lookup **Properties** Filter, Group, Nillable, Sort **Description** The unique identifier of the financial security.
`SourceSystemIdentifier`	**Type** external lookup **Properties** Filter, Group, idLookup, Nillable, Sort **Description** The unique identifier of the financial security in an external system.
`StockExchange`	**Type** picklist **Properties** Filter, Group, Nillable, Sort **Description** Exchange on which the securities are traded.
`Symbol`	**Type** string **Properties** Filter, Group, Nillable, Sort

Field	Details
	Description A ticker symbol that is used to uniquely identify the publicly traded securities in a stock exchange.
`Volume`	**Type** double **Properties** Filter, Nillable, Sort **Description** The amount of a security to trade during a specific period of time.

Associated Objects

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

FinancialSecurityChangeEvent on page 1009
Change events are available for the object.

FinancialSecurityFeed on page 1013
Feed tracking is available for the object.

FinancialSecurityHistory on page 1021
History is available for tracked fields of the object.

FinancialSecurityShare on page 1029
Sharing is available for the object.

FinclDealInteractionSummary

Represents a junction between an interaction summary and a financial deal. 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()`

Fields

Field	Details
`Comment`	**Type** textarea **Properties** Create, Nillable, Update

Field	Details
	Description Notes about the financial deal associated with the interaction summary.
`FinancialDealId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The financial deal associated with the interaction summary. This is a relationship field. **Relationship Name** FinancialDeal **Relationship Type** Lookup **Refers To** FinancialDeal
`InteractionSummaryId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The interaction summary associated with the financial deal interaction summary record. This is a relationship field. **Relationship Name** InteractionSummary **Relationship Type** Lookup **Refers To** InteractionSummary
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime

Field	Details
	Properties Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the financial deal interaction summary record.

Associated Objects

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

FinclDealInteractionSummaryChangeEvent on page 1009
Change events are available for the object.

FinclDealInteractionSummaryFeed on page 1013
Feed tracking is available for the object.

FinclDealInteractionSummaryHistory on page 1021
History is available for tracked fields of the object.

FlowOrchestrationInstRelaObj

Represents a junction between a flow orchestration instance and a related object. This object is available in API version 59.0 and later.

Supported Calls

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

Fields

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

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

Field	Details
	Relationship Type Lookup **Refers To** Group, User
PntFlowOrchstrtnInstRelaObjId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The parent flow orchestration instance associated with this record. This field is a relationship field. **Relationship Name** PntFlowOrchstrtnInstRelaObj **Relationship Type** Lookup **Refers To** FlowOrchestrationInstRelaObj
RelatedObjectId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The object for which the flow orchestration instance run was initiated. This field is a polymorphic relationship field. **Relationship Name** RelatedObject **Relationship Type** Lookup **Refers To** ApplicationForm, PartyProfile
Status	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the status of the orchestration run. Possible values are:

Field	Details
	• `Completed` • `FinishedWithErrors`—Finished with errors • `FixExceptions`—Fix Exceptions • `InProgress`—In Progress • `Restarted`

Associated Objects

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

FlowOrchestrationInstRelaObjChangeEvent on page 1009
Change events are available for the object.

FlowOrchestrationInstRelaObjFeed on page 1013
Feed tracking is available for the object.

FlowOrchestrationInstRelaObjHistory on page 1021
History is available for tracked fields of the object.

FlowOrchestrationInstRelaObjOwnerSharingRule on page 1026
Sharing rules are available for the object.

FlowOrchestrationInstRelaObjShare on page 1029
Sharing is available for the object.

GroupCensus

Represents a snapshot of statistics about eligible members (employees or members) of a group (employer or association) and their legal dependents. Use this entity in quoting, rating, and the subsequent enrollment process. Child object of employer or group Account. This object is available in API version 55.0 and later.

Supported Calls

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

Fields

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

Field	Details
	Description Group account associated with the census. This is a relationship field. **Relationship Name** Account **Relationship Type** Lookup **Refers To** Account
ContractId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The contract associated with the census. This is a relationship field. **Refers to** Contract
`EffectiveEndDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** Effective end date of the census.
`EffectiveStartDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** Effective start date of the census.
`ExternalIdentifier`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** External ID used to identify the group census in search. Used as a cross reference field if the group census is externally imported.

Field	Details
FullTimeMemberCount	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Number of full-time members.
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 most recent date on which a user viewed this record
LeadId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Lead associated with the census. This is a relationship field. **Relationship Name** Lead **Relationship Type** Lookup **Refers To** Lead
MbrWithMoreThan1ChldCount	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Number of members who have one or more children as dependents. Use in tier-based rating during quote and contract.
MbrWithMoreThan2ChldCount	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Number of members who have two or more children as dependents. Use in tier-based rating during quote and contract.
MbrWithoutDependentCount	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Number of single members who haven't declared any dependents for plan enrollment.
MemberOptOutCount	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Number of members who have opted out of plan enrollment and don't want to participate in the employer's benefits program.
MemberWithDependentCount	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Number of members who have dependents and no spouse.
MemberWithOneChildCount	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Number of members who have only one child as a dependent. Use in rating during quote and contract.

Field	Details
`MemberWithSpouseCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Number of members who have a spouse and no dependents.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Name of the census.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the user who currently owns this account. This is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`PartTimeMemberCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Number of part-time members.
`SourceSystemName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The source system of the census.

Field	Details
`SourceSystemType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the source system type. Possible values are: • `External` • `User`
`Status`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies the status of the census. Possible values are: • `Active` • `Draft` • `Inactive`
`TotalDependents`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Number of dependents.
`TotalMemberPlusDependent`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Number of members and dependents.
`TotalMembers`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Number of members.
`Type`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the stage this census is mapped to. Possible values are: • `Enrollment` • `Lead` • `Quote` • `System`
`UsageType`	**Type** picklist **Properties** Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort **Description** Internal field. Specifies the application using the group census to populate data. Possible values are: • `Insurance` The default value is 'Insurance'.

Associated Objects

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

GroupCensusChangeEvent on page 1009
Change events are available for the object in API version 62.0 and later.

GroupCensusFeed on page 1013
Feed tracking is available for the object.

GroupCensusHistory on page 1021
History is available for tracked fields of the object.

GroupCensusOwnerSharingRule on page 1026
Sharing rules are available for the object.

GroupCensusShare on page 1029
Sharing is available for the object.

GroupCensusMember

Represents personal information about a member, for example employee or association member, or their dependents. GroupCensusMember is used to estimate the insurance plan cost for the group. This object is also used in the enrollment process to retrieve the member and dependent details. Child object of GroupCensus. This object is available in API version 55.0 and later.

Supported Calls

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

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The person account associated with the census member. This is a relationship field. **Relationship Name** Account **Relationship Type** Lookup **Refers To** Account
`Address`	**Type** address **Properties** Filter, Nillable **Description** The census member's address.
`AnnualEligibleSalary`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The census member's annual eligible salary, which is used to determine life insurance coverage.

Field	Details
`Birthdate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The census member's birthdate.
`City`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The city detail for the address.
`ContactId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The contact associated with the census member. This is a relationship field. **Relationship Name** Contact **Relationship Type** Lookup **Refers To** Contact
`Country`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The country detail for the address.
`DependentCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Number of the census member's dependents. Children, parents, and parents-in-law are included in the number of dependents. Spouse isn't included in the number of dependents.
`Email`	**Type** email **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** The census member's email address.
`FirstName`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The census member's first name.
`FullTimeEquivalent`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Census member’s hours divided by the employer’s hours for a full-time work week. 1 is equal to full-time hours, 0.5 is 50% of the full-time equivalent.
`Gender`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The census member's gender.
`GeocodeAccuracy`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Accuracy level of the geocode for the address. Possible values are: • `Address`

Field	Details
	• Block • City • County • ExtendedZip • NearAddress • Neighborhood • State • Street • Unknown • Zip
GroupCensusId	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The group census associated with the member. This is a relationship field. **Relationship Name** GroupCensus **Relationship Type** Lookup **Refers To** GroupCensus
GroupClassId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The group class associated with the census member. This is a relationship field. **Relationship Name** GroupClass **Relationship Type** Lookup **Refers To** GroupClass

Field	Details
IsOptOutAllPlans	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the census member has opted out of all plans. Used to calculate OptOutCount for GroupCensus when RelationshipType is 'Self'. The default value is 'false'.
IsPortalUser	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the census member is created as a portal user. The default value is 'false'.
JoinDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The census member's hire date.
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.
Lastname	**Type** string

Field	Details
	Properties Create, Filter, Group, idLookup, Sort, Update **Description** The census member's last name.
`Latitude`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Used with Longitude to specify the precise geolocation of the address.
`Longitude`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Used with Latitude to specify the precise geolocation of the address.
`MemberKey`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** The hash key that's used for identifying duplicate group census member records. By default, the hash key is a combination of First Name, Last Name, and Email ID.
`MemberType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Type of member.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Name of the census member.

Field	Details
`OptOutPlanTypes`	**Type** multipicklist **Properties** Create, Filter, Nillable, Update **Description** Specifies the plan types the census member opts out of. Possible values are: • `Dental` • `Life` • `Medical` • `Medical Savings Account` • `Retirement` • `Vision`
`PhoneNumber`	**Type** phone **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** The census member's phone number.
`PolicyStartDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The policy's start date.
`PostalCode`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The postal code for the address.
`PrimaryGroupCensusMemberId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The primary group census member associated with the census member. This is a relationship field. **Relationship Name** PrimaryGroupCensusMember **Relationship Type** Lookup **Refers To** GroupCensusMember
`PrimaryMemberCategory`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the category of the primary census member.
`PrimaryMemberSource`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** External identifier of the primary member. Maximum size is 255 characters.
`RelationshipToPrimaryMember`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The census member's relationship to the primary member.
`SmokerStatus`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the smoking status of the user
`SourceSystemIdentifier`	**Type** string

Field	Details
	Properties Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** Source System external ID of the group census member.
`State`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The state detail for the address.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the status of the group census member. Possible values are: • `Completed` • `Incompleted` • `Not Determined`
`Street`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The street detail for the address.

Associated Objects

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

GroupCensusMemberChangeEvent on page 1009
Change events are available for the object in API version 62.0 and later.

GroupCensusMemberFeed on page 1013
Feed tracking is available for the object.

GroupCensusMemberHistory on page 1021
History is available for tracked fields of the object.

GroupCensusMemberPlan

Represents the association of GroupCensusMember and ContractGroupPlan. Use this entity when census data includes previous member enrollment plan details and new member plan details. You can populate GroupCensusMemberPlan by reading the enrollment census in the enrollment services before creating insurance policies. This object is available in API version 55.0 and later.

Supported Calls

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

Fields

Field	Details
`ContractGroupPlanId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The contract group plan associated with the group census member plan. This is a relationship field. **Relationship Name** ContractGroupPlan **Relationship Type** Lookup **Refers To** ContractGroupPlan
`GroupCensusMemberId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The group census member associated with the group census member plan. This is a relationship field. **Relationship Name** GroupCensusMember **Relationship Type** Lookup **Refers To** GroupCensusMember

Field	Details
`EnrollmentStatus`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted **Description** The status of the enrollment, that is, the policy creation for a census member and their corresponding plan. Possible values are: • Completed • Failed • To Be Started The default value is `To Be Started`.
`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** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the group census member plan.
`OwnerId`	**Type** reference **Properties** Create, Default on create, Filter, Group, Sort, Update **Description** The owner associated with the group census member plan.

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

Associated Objects

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

GroupCensusMemberPlanChangeEvent on page 1009
Change events are available for the object in API version 62.0 and later.

GroupCensusMemberPlanFeed on page 1013
Feed tracking is available for the object.

GroupCensusMemberPlanHistory on page 1021
History is available for tracked fields of the object.

GroupClass

Represents the classification of group members that receive similar benefits. Example classes include executives, union, and office workers. Child object of employer or group Account. This object is available in API version 55.0 and later.

Supported Calls

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

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** ID of the related account record. This is a relationship field.

Field	Details
	Relationship Name Account **Relationship Type** Lookup **Refers To** Account
`Category`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The class category the group class belongs to.
`Code`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Code for the group class.
`Description`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Description of the group class.
`EffectiveEndDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Effective end date of the group class.
`EffectiveStartDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Effective start date of the group class.

Field	Details
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last accessed this record, a record related to this record, or a list view.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last viewed this record or list view.
Name	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Name of the group class.
ParentGroupClassId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The parent group class associated with the group class. This is a relationship field. **Relationship Name** ParentGroupClass **Relationship Type** Lookup **Refers To** GroupClass
UsageType	**Type** picklist **Properties** Defaulted on create, Filter, Group, Restricted picklist, Sort

Field	Details
	Description Internal field. Specifies the application using the group census to populate data. For example, Insurance or Loyalty. Possible values are: • `Insurance` The default value is 'Insurance'.

Associated Objects

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

GroupClassChangeEvent on page 1009
Change events are available for the object in API version 62.0 and later.

GroupClassHistory on page 1021
History is available for tracked fields of the object.

GroupClassOwnerSharingRule on page 1026
Sharing rules are available for the object.

GroupClassShare on page 1029
Sharing is available for the object.

GroupClassContribution

Represents employer or group contributions for GroupClass members and their dependents on a per product category such as medical, dental, or vision. Child object of GroupClass. This object is available in API version 55.0 and later.

Supported Calls

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

Fields

Field	Details
`Amount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description The employer's contribution currency amount for the corresponding contract plan. If MemberType is Subscriber or not specified, the contribution amount is for the main member. If MemberType is Dependent, the contribution amount is for the dependents.
`ContractGroupPlanId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The contract group plan associated with the group class contribution. This is a relationship field. **Relationship Name** ContractGroupPlan **Relationship Type** Lookup **Refers To** ContractGroupPlan
`EffectiveEndDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Effective end date of the group class contribution.
`EffectiveStartDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Effective start date of the group class contribution.
`GroupBenefitProductCategory`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the group benefit product category.

Field	Details
`GroupClassId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The group class associated with the group class contribution. This is a relationship field. **Relationship Name** GroupClass **Relationship Type** Lookup **Refers To** GroupClass
`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.
`MemberType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the member type. Possible values are: • `Dependent` • `Subscriber`
`Name`	**Type** string

Field	Details
	Properties Create, Filter, Group, idLookup, Sort, Update **Description** Name of the group class contribution.
`Percentage`	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** The employer's contribution percentage amount for the corresponding contract plan. If MemberType is Subscriber or not specified, the contribution amount is for the main member. If MemberType is Dependent, the contribution amount is for the dependent.
`Type`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the contribution type. Possible values are: • `Amount` • `Percentage`

Associated Objects

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

GroupClassContributionChangeEvent on page 1009
Change events are available for the object in API version 62.0 and later.

GroupClassContributionHistory on page 1021
History is available for tracked fields of the object.

GrpCensusGrpClassSummary

Represents a junction between group census and group class to get statistics about the group class members for the associated group census.

Supported Calls

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

Fields

Field	Details
`FullTimeMemberCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Number of full-time members.
`GroupCensusId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The group census associated with the record. This field is a relationship field. **Relationship Name** GroupCensus **Relationship Type** Master-detail **Refers To** GroupCensus (the master object)
`GroupClassId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The group class associated with the record. This field is a relationship field. **Relationship Name** GroupClass **Refers To** GroupClass

Field	Details
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last viewed this record or list view. If this value is null, and `LastReferenceDate` is not null, the user accessed this record or list view indirectly.
`MbrWithMoreThan1ChldCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Number of members who have one or more children as dependents. Use in tier-based rating during quote and contract.
`MbrWithMoreThan2ChldCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Number of members who have two or more children as dependents. Use in tier-based rating during quote and contract.
`MbrWithoutDependentCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Number of single members who haven't declared any dependents for plan enrollment.
`MemberOptOutCount`	**Type** int

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** Number of members who have opted out of plan enrollment and don't want to participate in the employer's benefits program.
`MemberWithDependentCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Number of members who have dependents and no spouse.
`MemberWithOneChildCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Number of members who have only one child as a dependent. Use in rating during quote and contract.
`MemberWithSpouseCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Number of members who have a spouse and no dependents.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Name of the census.
`PartTimeMemberCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Number of part-time members.

Field	Details
`TotalDependents`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Number of dependents.
`TotalMemberPlusDependent`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Number of members and dependents.
`TotalMembers`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Number of members.

Associated Objects

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

GrpCensusGrpClassSummaryChangeEvent on page 1009
Change events are available for the object.

GrpCensusGrpClassSummaryHistory on page 1021
History is available for tracked fields of the object.

IdentityDocument

Represents information about documents used to identify Financial Services Cloud clients.

Supported Calls

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

Fields

Field	Details
`ExpirationDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date when the document expires.
`IdDocumentType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Type of the document that's used to verify the client's identity.
`IssueDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date when the document was issued.
`IssuingAuthority`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The authority that issued the document.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort

Field	Details
	Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Name of the document.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the user who created this record.
`PartyProfileId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The party profile associated with this record. This field is a relationship field. **Relationship Name** PartyProfile **Relationship Type** Lookup **Refers To** PartyProfile
`RelatedLegalEntityId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** ID of the legal entity related to this document.
`VerifiedById`	**Type** reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** Name of the person who verified this document.
`VerifiedOn`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** Date when this document was verified.

Associated Objects

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

IdentityDocumentChangeEvent (API version 61.0)
Change events are available for the object.

IndexRate

Represents a base rate that's defined by an authority. This object is available in API version 61.0 and later. Available with Digital Lending permission set.

Supported Calls

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

Fields

Field	Details
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the rate is active (`true`) or not (`false`). The default value is `false`.

Field	Details
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Timestamp for when the current user last viewed this record.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the authority defining the index rate.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the user who created the index rate record. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`Rate`	**Type** percent **Properties** Create, Filter, Sort, Update **Description** The index rate as defined by the authority.

Field	Details
`ValidEndDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The end date of the rate.
`ValidStartDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The start date of the rate.

Associated Objects

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

indexrateChangeEvent on page 1009
Change events are available for the object.

IndexRateFeed on page 1013
Feed tracking is available for the object.

IndexRateHistory on page 1021
History is available for tracked fields of the object.

IndexRateShare on page 1029
Sharing is available for the object.

InfoAuthorizationRequest

Tracks a request for authorization on a Data Use Purpose. For example, consent request to share the documents required to open a financial account and share loan rate lock disclosure to the external customer. 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
`CommunicationType`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The medium of which this request was sent. Possible values are: • `Email` • `Mail` • `Paper` • `Phone` • `Web` The default value is 'Paper'.
`ConsenterId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The external (communities) account who is consenting to this request. This is a polymorphic relationship field. **Relationship Name** Consenter **Relationship Type** Lookup **Refers To** Account, Contact, User
`DataUsePurposeId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** Reference to the purpose of this request. This is a relationship field. **Relationship Name** DataUsePurpose

Field	Details
	Relationship Type Lookup **Refers To** DataUsePurpose
ExpirationDateTime	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The expiration date of this request.
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.
Locale	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The locale of the request (used to find Auth Form Texts that match the locale).
MultipartyInfoAuthRequestId	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the related multiparty info authorization request record. This is a relationship field.

Field	Details
	Relationship Name MultipartyInfoAuthRequest **Relationship Type** Lookup **Refers To** MultipartyInfoAuthRequest
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Name of the info authorization request record.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the user who created the relationship record. This is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`PertainsToId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The person to whom this request pertains. This is a polymorphic relationship field. **Relationship Name** PertainsTo **Relationship Type** Lookup **Refers To** Account, Contact, User

Field	Details
`RequestedDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date time that this request was sent.
`RequesterId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The party that initiated the request. This is a polymorphic relationship field. **Relationship Name** Requester **Relationship Type** Lookup **Refers To** Account, Contact, User
`ResponseStatus`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The consentee's response to this request. Possible values are: • `New` • `Rejected` • `Seen` • `Signed` The default value is 'New'.
`SourceRecordId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The record from which this consent request is created.

Field	Details
	This is a relationship field. **Relationship Name** SourceRecord **Relationship Type** Lookup **Refers To** Account, BusinessMilestone, Campaign, Case, Claim, ClaimItem, Contact, Contract, DocumentChecklistItem, FinServ__AccountAccountRelation__c, FinServ__Alert__c, FinServ__AssetsAndLiabilities__c, FinServ__B2CLeadCompanyNameConfig__c, FinServ__BillingStatement__c, FinServ__Card__c, FinServ__ChargesAndFees__c, FinServ__ContactContactRelation__c, FinServ__Education__c, FinServ__Employment__c, FinServ__FinancialAccountRole__c, FinServ__FinancialAccountTransaction__c, FinServ__FinancialAccount__c, FinServ__FinancialGoal__c, FinServ__FinancialHolding__c, FinServ__IdentificationDocument__c, FinServ__IndustriesAppConfig__c, FinServ__IndustriesSettings__c, FinServ__LifeEvent__c, FinServ__NextLastInteractionSettings__c, FinServ__PolicyPaymentMethod__c, FinServ__ReciprocalRole__c, FinServ__Record_Rollup_Configuration__c, FinServ__Revenue__c, FinServ__RollupByLookupConfig__c, FinServ__RollupByLookupFilterCriteria__c, FinServ__Securities__c, FinServ__UsePersonAccount__c, FinServ__WealthAppConfig__c, FinServ__individualExcludedFields__c, InsurancePolicyCoverage, Lead, Opportunity, OpportunityLineItem, Order, OrderItem, PersonLifeEvent, Quote, QuoteLineItem, ResidentialLoanApplication, Task

Associated Objects

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

InfoAuthorizationRequestChangeEvent on page 1009
Change events are available for the object.

InfoAuthorizationRequestFeed on page 1013
Feed tracking is available for the object.

InfoAuthorizationRequestHistory on page 1021
History is available for tracked fields of the object.

InfoAuthorizationRequestShare on page 1029
Sharing is available for the object.

InfoAuthRequestForm

Tracks the individual Authorization Form Texts that belong to an Authorization Request. For example, consent on GDPR privacy policy document and consent on mortgage loan rate lock fee document. This object is available in API version 52.0 and later.

Supported Calls

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

Special Access Rules

To grant community users access to InfoAuthRequestForm records, from Setup, go to Sharing Settings and set the Info Authorization Request object's default internal and external access to Private.

Fields

Field	Details
`AuthorizationFormTextId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** A link to the Authorization Form Text to which this request is related. This is a relationship field. **Relationship Name** AuthorizationFormText **Relationship Type** Lookup **Refers To** AuthorizationFormText
`InfoAuthorizationRequestId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The Information Authorization Request to which this record is related. This is a relationship field. **Relationship Name** InfoAuthorizationRequest **Relationship Type** Lookup **Refers To** InfoAuthorizationRequest

Field	Details
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
LatestAuthFormConsentId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The most recent response from the consenter. This is a relationship field. **Relationship Name** LatestAuthFormConsent **Relationship Type** Lookup **Refers To** AuthorizationFormConsent
LatestResponseDateTime	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The time of the latest response from the consenter.
Name	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort

Field	Details
	Description Name of the info authorization request record.
`ResponseStatus`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The response from the latest Authorization Form Consent related to this record. Possible values are: • `New` • `Rejected` • `Seen` • `Signed` The default value is 'New'.

InformationVerification

Represents the details of the information verification initiated for an object. This object is available in API version 61.0 and later. Available with Digital Lending permission set.

Supported Calls

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

Fields

Field	Details
`AssignedDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time when the information was assigned to the verifier for verification.
`Comments`	**Type** textarea

Field	Details
	Properties Create, Nillable, Update **Description** The verifier's comments to the information verified.
`EndDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time when the information verification was complete.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date when a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date when a user viewed this record.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The owner of this record. This field is a polymorphic relationship field. **Relationship Name** Owner **Refers To** Group, User
`Purpose`	**Type** picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the purpose of the information verification, such as collateral lien search or title search. Possible values are: • `Collateral Lien Search` • `Collateral Ownership Check` • `Collateral Title Clearance` • `Collateral Valuation Verification`
`RelatedInformationVerfId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the related information verification record that this verification record is associated with. This field is a relationship field. **Relationship Name** RelatedInformationVerf **Refers To** InformationVerification
`Stage`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the stage of the information verification. Possible values are: • `Approved` • `In progress` • `New` • `Rejected`
`StartDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description The date and time when the information verification was started.
`VerificationObjectId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The object for which the information verification was initiated. This field is a polymorphic relationship field. **Relationship Name** VerificationObject **Refers To** ApplicationForm, PartyProfile
`VerificationParentObjectId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The context for which the information verification was initiated. This field is a polymorphic relationship field. **Relationship Name** VerificationParentObject **Refers To** ApplicationForm, PartyProfile
`VerificationScope`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the scope of the information verification.
`VerifiedById`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The user or account who verified the information. This field is a polymorphic relationship field.

Field	Details
	Relationship Name VerifiedBy **Refers To** Account, User

Associated Objects

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

InformationVerificationChangeEvent on page 1009
Change events are available for the object.

InformationVerificationFeed on page 1013
Feed tracking is available for the object.

InformationVerificationHistory on page 1021
History is available for tracked fields of the object.

InformationVerificationOwnerSharingRule on page 1026
Sharing rules are available for the object.

InformationVerificationShare on page 1029
Sharing is available for the object.

InsBnftEligDefinition

Represents employee eligibility information for a benefit that's offered by an employer. This object is available in API version 61 and later.

Supported Calls

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

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The client account that's associated with the rule This field is a relationship field.

Field	Details
	Relationship Name Account **Relationship Type** Master-detail **Refers To** Account (the master object)
`CurrencyIsoCode`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** If multiple currencies are enabled, this field contains the currency ISO code associated with the record. Possible values are: • `EUR`—Euro • `GBP`—British Pound • `USD`—U.S. Dollar The default value is `USD`.
`EffectiveFromDate`	**Type** date **Properties** Create, Filter, Group, Sort, Update **Description** The date from when the eligibility rule is active.
`EffectiveToDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date on which the eligibility rule becomes inactive.
`EligibilityInitiationType`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies when the benefit coverage of the employee starts. Possible values are:

Field	Details
	• `Date of Hire` • `First of the Month Following 30 Days` • `First of the Month Following 60 Days` • `First of the Month Following Date of Hire` • `Hire Month + 1 Month` • `Hire Month start` • `Year Start`
`EligibilityTerminationType`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies when the benefit coverage of the employee ends. Possible values are: • `Date of Termination` • `End of Month following Date of Termination` • `Termination Month + 1 month end` • `Termination Month End` • `Year End`
`EmployeeType`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies the type of employee the rule applies to. Possible values are: • `Contract Based` • `Full Time` • `Full-Time 30 Hours per Week` • `Full-Time 32 Hours per Week` • `Part Time`
`IsChildEligible`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the employee's children are eligible for the coverage or not.

Field	Details
	The default value is `false`.
`IsPartnerEligible`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the employee's spouse or domestic partner is eligible for the coverage or not. The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last viewed this record or list view. If this value is null, and `LastReferenceDate` is not null, the user accessed this record or list view indirectly.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the rule.

Associated Objects

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

InsBnftEligDefinitionChangeEvent on page 1009
Change events are available for the object in API version 62.0 and later.

InsBnftEligDefinitionHistory on page 1021
History is available for tracked fields of the object.

InsContributionPlnGroupCls

Represents a junction between employee group class and their contribution towards their insurance. This object is available in API version 61 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** If multiple currencies are enabled, this field contains the currency ISO code associated with the record. Possible values are: • `EUR`—Euro • `GBP`—British Pound • `USD`—U.S. Dollar The default value is `USD`.
`GroupClassId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The group class of an employee to which the insurance contribution plan is applicable. This field is a relationship field. **Relationship Name** GroupClass **Refers To** GroupClass

Field	Details
InsuranceContributionPlanId	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The insurance contribution plan that's assigned to group class of an employee. This field is a relationship field. **Relationship Name** InsuranceContributionPlan **Refers To** InsuranceContributionPlan
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last viewed this record or list view. If this value is null, and `LastReferenceDate` is not null, the user accessed this record or list view indirectly.
Name	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the insurance policy benefit eligibility record.
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 **Refers To** Group, User

Associated Objects

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

InsContributionPlnGroupClsChangeEvent on page 1009
Change events are available for the object in API version 62.0 and later.

InsContributionPlnGroupClsHistory on page 1021
History is available for tracked fields of the object.

InsContributionPlnGroupClsOwnerSharingRule on page 1026
Sharing rules are available for the object.

InsContributionPlnGroupClsShare on page 1029
Sharing is available for the object.

InsContributionPlnLineItem

Represents information about each contribution made by an employee towards their insurance. This object is available in API version 61 and later.

Supported Calls

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

Fields

Field	Details
`Amount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The amount paid by the employee as contribution towards the policy.

Field	Details
CurrencyIsoCode	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** If multiple currencies are enabled, this field contains the currency ISO code associated with the record. Possible values are: • EUR—Euro • GBP—British Pound • USD—U.S. Dollar The default value is USD.
InsuranceContributionPlanId	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The parent insurance contribution plan that's associated with the line item. This field is a relationship field. **Relationship Name** InsuranceContributionPlan **Relationship Type** Master-detail **Refers To** InsuranceContributionPlan (the master object)
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort

Field	Details
	Description The timestamp when the current user last viewed this record or list view. If this value is null, and `LastReferenceDate` is not null, the user accessed this record or list view indirectly.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the line item.
`PremiumPercent`	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** The percentage of premium that the contribution amount represents
`Tier`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies the employee tier that's associated with specific contribution plan.

Associated Objects

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

InsContributionPlnLineItemChangeEvent on page 1009
Change events are available for the object in API version 62.0 and later.

InsContributionPlnLineItemHistory on page 1021
History is available for tracked fields of the object.

InsPlcyLimit

Represents the data that's used as a base to track the insurance policy consumption. This object is available in API version 65.0 and later.

Supported Calls

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

Fields

Field	Details
`Amount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The currency amount for the insurance policy or coverage attributes.
`AssociatedAttributeId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The insurance policy attribute or insurance policy coverage attribute that's associated with the insurance policy limit.
`InsurancePlcyLmtCode`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The unique code of the insurance policy limits across all policy versions.
`InsurancePolicyAssetId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The insurance policy asset that's associated with the insurance policy limit.
`InsurancePolicyCoverageId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The insurance policy coverage that's associated with the insurance policy limit.

Field	Details
InsuredPolicyParticipantId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The insurance policy participant that's associated with the insurance policy limit.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
Name	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** Name of the insurance policy limit record.
PolicyVersionId	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The insurance policy version that's associated with the insurance policy limit.
ProdtAttrMappedScopeId	**Type** reference **Properties** Create, Filter, Group, Sort, Update

Field	Details
	Description The product attribute mapped scope that's associated with the insurance policy limit.
`Value`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The count for the insurance policy or coverage attributes.

Associated Objects

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

InsPlcyLimitHistory on page 1021
History is available for tracked fields of the object.

InsPlcyLimitTracking

Represents the calculated values based on the consumption of the policy and coverage attributes during claims processing. This object is available in API version 65.0 and later.

Supported Calls

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

Fields

Field	Details
`CalcInitialAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The calculated currency amount that's used as the base value for tracking the policy attribute consumption.
`CalcInitialValue`	**Type** int

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The count that's used as the base for tracking the policy attribute consumption.
`ClaimCoverageId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The claim coverage that's associated with the insurance policy limit tracking.
`ClaimCoveragePaymentDetailId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The claim coverage payment detail that's associated with the insurance policy limit tracking.
`ClaimId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The claim that's associated with the insurance policy limit tracking.
`ClaimItemId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The claim item that's associated with the insurance policy limit tracking.
`InsPlcyLimitId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The insurance policy limit that's associated with the insurance limit tracking.
`LastReferencedDate`	**Type** dateTime

Field	Details
	Properties Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the insurance policy limit tracking.
`PostedAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The amount posted by the claimant when submitting the claim.
`PostedValue`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The count that's populated when submitting the claim.
`RemainingAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The remaining amount to carry forward for the next payment. It's the difference between the calculated initial amount and the requested amount.

Field	Details
RemainingValue	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The remaining value to carry forward for the next payment. It's the difference between the calculated initial value and the requested value.
RequestedDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date on which the claim payment was requested.
TotalUsedAmount	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The total amount used till date.
TotalUsedValue	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The total value used till date.

Associated Objects

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

InsPlcyLimitTrackingHistory on page 1021
History is available for tracked fields of the object.

InsPlcyLimitTrackingShare on page 1029
Sharing is available for the object.

InsPolicyAssetAttribute

Represents attributes for insurance policy asset. This object is available in API version 63.0 and later.

Supported Calls

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

Fields

Field	Details
`AttributeDefinitionId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The attribute definition associated with the Insurance Policy Asset Attribute. This field is a relationship field.
`AttributeName`	**Type** string **Properties** Filter, Group, idLookup, Nillable, Sort **Description** The name of the attribute.
`AttributePicklistValueId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The attribute picklist value associated with the Insurance Policy Asset Attribute. This field is a relationship field.
`AttributeValue`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The value of the attribute.
`InsurancePolicyAssetId`	**Type** reference **Properties** Create, Filter, Group, Sort

Field	Details
	Description The insurance policy asset associated with the Insurance Policy Asset Attribute. This field is a relationship field.

InsPolicyAssetRelatedObj

Represents the relationship between an Insurance Policy Asset and a related object. The values of the attributes from the related object are referenced by the relevant product attributes on Insurance Policy Asset. This object is available in API version 63.0 and later.

Supported Calls

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

Fields

Field	Details
`InsurancePolicyAssetId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The insurance policy asset associated with the related object. This field is a relationship field.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.

Field	Details
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the insurance policy asset related object record.
`RelatedRecordIdentifier`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The identifier of the record that's used to get the details of the related insurance policy coverage object.
`RelatedRecordObjectName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort **Description** The name of the object that's associated with the related record identifier.
`UsageType`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies the usage of the related record object. Possible values are: • `ExtendedAttribute`—Extended Attribute The default value is `ExtendedAttribute`.

Associated Objects

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

InsPolicyAssetRelatedObjFeed on page 1013
Feed tracking is available for the object.

InsPolicyAssetRelatedObjHistory on page 1021
History is available for tracked fields of the object.

InsPolicyBenefitEligibility

Represents information about insurance eligibility of an employee that belongs to a specific group class. This object is available in API version 61 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** If multiple currencies are enabled, this field contains the currency ISO code associated with the record. Possible values are: • `EUR`—Euro • `GBP`—British Pound • `USD`—U.S. Dollar The default value is `USD`.
`GroupClassId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The group class of employees that's associated with the eligibility rule This field is a relationship field. **Relationship Name** GroupClass **Refers To** GroupClass
`InsBnftEligDefinitionId`	**Type** reference

Field	Details
	Properties Create, Filter, Group, Sort, Update **Description** The eligibility rule that is applicable under specific insurance policy or policy coverage for specific group class of employees. This field is a relationship field. **Relationship Name** InsBnftEligDefinition **Refers To** InsBnftEligDefinition
InsPolicyBenefitEligibility	The insurance policy benefit that's associated with the eligibility rule.
InsurancePolicyCoverageId	The insurance policy coverage that's associated with the eligibility rule.
InsurancePolicyId	The insurance policy that's associated with the eligibility rule.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last viewed this record or list view. If this value is null, and `LastReferenceDate` is not null, the user accessed this record or list view indirectly.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the insurance policy benefit eligibility record.

Associated Objects

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

InsPolicyBenefitEligibilityChangeEvent on page 1009
Change events are available for the object in API version 62.0 and later.

InsPolicyBenefitEligibilityHistory on page 1021
History is available for tracked fields of the object.

InsPolicyBenefitEligibilityOwnerSharingRule on page 1026
Sharing rules are available for the object.

InsPolicyBenefitEligibilityShare on page 1029
Sharing is available for the object.

InsPolicyCoverageAttribute

Represents attributes for insurance policy coverage. This object is available in API version 63.0 and later.

Supported Calls

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

Fields

Field	Details
`AttributeDefinitionId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The attribute definition associated with the Insurance Policy Coverage Attribute. This field is a relationship field.
`AttributeName`	**Type** string **Properties** Filter, Group, idLookup, Nillable, Sort **Description** The name of the attribute.
`AttributePicklistValueId`	**Type** reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The attribute picklist value associated with the Insurance Policy Coverage Attribute. This field is a relationship field.
`AttributeValue`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The value of the attribute.
`InsurancePolicyCoverageId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The insurance policy coverage associated with the Insurance Policy Coverage Attribute. This field is a relationship field.

InsPolicyCoverageBenefit

Represents information about the insurance policy coverage benefits. This object is available in API version 62 and later.

Supported Calls

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

Fields

Field	Details
`BenefitTermGroupId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The grouping of similar benefits that are part of the insurance policy coverage.

Field	Details
	This field is a relationship field. **Relationship Name** BenefitTermGroup **Refers To** ProductComponentGroup
`BenefitTermId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The terms for providing the benefit ithat's part of the insurance policy coverage. This field is a relationship field. **Relationship Name** BenefitTerm **Refers To** Product2
`CurrencyIsoCode`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** If multiple currencies are enabled, this field contains the currency ISO code associated with the record. Possible values are: • `EUR`—Euro • `GBP`—British Pound • `USD`—U.S. Dollar The default value is `USD`.
`InsPolicyCoverageNetworkId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The policy coverage network associated with the benefit. This field is a relationship field. **Relationship Name** InsPolicyCoverageNetwork

Field	Details
	Refers To InsPolicyCoverageNetwork
`InsurancePolicyCoverageId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The insurance policy coverage that's associated with the benefit. This field is a relationship field. **Relationship Name** InsurancePolicyCoverage **Relationship Type** Master-detail **Refers To** InsurancePolicyCoverage (the master object)
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last viewed this record or list view. If this value is null, and `LastReferenceDate` is not null, the user accessed this record or list view indirectly.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the insurance policy coverage benefit.

Associated Objects

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

InsPolicyCoverageBenefitChangeEvent on page 1009
Change events are available for the object in API version 62.0 and later.

InsPolicyCoverageBenefitHistory on page 1021
History is available for tracked fields of the object.

InsPolicyCoverageNetwork

Represents information about the insurance policy coverage network. This object is available in API version 62 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** If multiple currencies are enabled, this field contains the currency ISO code associated with the record. Possible values are: • `EUR`—Euro • `GBP`—British Pound • `USD`—U.S. Dollar The default value is `USD`.
`InsurancePolicyCoverageId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The insurance policy coverage associated with the policy coverage network. This field is a relationship field.

Field	Details
	Relationship Name InsurancePolicyCoverage **Relationship Type** Master-detail **Refers To** InsurancePolicyCoverage (the master object)
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last viewed this record or list view. If this value is null, and `LastReferenceDate` is not null, the user accessed this record or list view indirectly.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the policy coverage network.
`TierType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The type of network tier. Possible values are: • `First Network Tier` • `Fourth Network Tier` • `Second Network Tier` • `Third Network Tier`

Associated Objects

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

InsPolicyCoverageNetworkChangeEvent on page 1009
Change events are available for the object in API version 62.0 and later.

InsPolicyCoverageNetworkHistory on page 1021
History is available for tracked fields of the object.

InsPolicyCvrBnftAttribute

Represents a view of the attributes on an insurance policy coverage benefit. This object is available in API version 62 and later.

Supported Calls

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

Fields

Field	Details
`AttributeDefinitionId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The attribute definition associated with the insurance policy coverage benefit attribute. This field is a relationship field. **Relationship Name** AttributeDefinition **Refers To** AttributeDefinition
`AttributePicklistValueId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The attribute picklist value associated with the insurance policy coverge benefit attribute. This field is a relationship field. **Relationship Name** AttributePicklistValue

Field	Details
	Refers To AttributePicklistValue
InsPolicyCoverageBenefitId	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The parent insurance policy coverage benefit associated with the insurance policy coverage benefit attribute. This field is a relationship field. **Relationship Name** InsPolicyCoverageBenefit **Relationship Type** Master-detail **Refers To** InsPolicyCoverageBenefit (the master object)
Name	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the insurance policy coverage benefit attribute.
Value	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The insurance policy coverage benefit attribute value.

InsPolicyCvrRelatedObj

Represents the relationship between an Insurance Policy Coverage and a related object. The values of the attributes from the related object are referenced by the relevant product attributes on Insurance Policy Coverage. This object is available in API version 63.0 and later.

Supported Calls

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

Fields

Field	Details
`InsurancePolicyCoverageId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The insurance policy coverage associated with the related object. This field is a relationship field.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the insurance policy coverage related object record.
`RelatedRecordIdentifier`	**Type** string **Properties** Create, Filter, Group, Sort, Update

Field	Details
	Description The identifier of the record that's used to get the details of the related insurance policy coverage object.
`RelatedRecordObjectName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort **Description** The name of the object that's associated with the related record identifier.
`UsageType`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies the usage of the related record object. Possible values are: • `ExtendedAttribute`—Extended Attribute The default value is `ExtendedAttribute`.

Associated Objects

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

InsPolicyCvrRelatedObjFeed **on page 1013**
Feed tracking is available for the object.

InsPolicyCvrRelatedObjHistory **on page 1021**
History is available for tracked fields of the object.

InsPolicyParticipantAttr

Represents attributes for insurance policy participant. This object is available in API version 63.0 and later.

Supported Calls

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

Fields

Field	Details
`AttributeDefinitionId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The attribute definition associated with the Insurance Policy Participant Attribute. This field is a relationship field.
`AttributeName`	**Type** string **Properties** Filter, Group, idLookup, Nillable, Sort **Description** The name of the attribute.
`AttributePicklistValueId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The attribute picklist value associated with the Insurance Policy Participant Attribute. This field is a relationship field.
`AttributeValue`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The value of the attribute.
`InsurancePolicyParticipantId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The insurance policy participant associated with the Insurance Policy Participant Attribute. This field is a relationship field.

InsPolicyPtcpRelatedObj

Represents the relationship between an Insurance Policy Participant and a related object. The values of the attributes from the related object are referenced by the relevant product attributes on Insurance Policy Participant. This object is available in API version 63.0 and later.

Supported Calls

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

Fields

Field	Details
`InsurancePolicyParticipantId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The insurance policy participant associated with the related object. This field is a relationship field.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort

Field	Details
	Description The name of the insurance policy participant related object record.
`RelatedRecordIdentifier`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The identifier of the record that's used to get the details of the related insurance policy participant object.
`RelatedRecordObjectName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort **Description** The name of the object that's associated with the related record identifier.
`UsageType`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies the usage of the related record object. Possible values are: • `ExtendedAttribute`—Extended Attribute The default value is `ExtendedAttribute`.

Associated Objects

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

InsPolicyPtcpRelatedObjFeed on page 1013
Feed tracking is available for the object.

InsPolicyPtcpRelatedObjHistory on page 1021
History is available for tracked fields of the object.

InsPolicyRelatedObject

Represents the relationship between an Insurance Policy and a related object. The values of the attributes from the related object are referenced by the relevant product attributes on Insurance Policy. This object is available in API version 63.0 and later.

Supported Calls

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

Fields

Field	Details
`InsurancePolicyId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The insurance policy that's associated with the related object. This field is a relationship field.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the insurance policy related object record.

Field	Details
`RelatedRecordIdentifier`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The identifier of the record that's used to get the details of the related insurance policy object.
`RelatedRecordObjectName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort **Description** The name of the object that's associated with the related record identifier.
`UsageType`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies the usage of the related record object. Possible values are: • `ExtendedAttribute`—Extended Attribute The default value is `ExtendedAttribute`.

Associated Objects

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

InsPolicyRelatedObjectFeed on page 1013
Feed tracking is available for the object.

InsPolicyRelatedObjectHistory on page 1021
History is available for tracked fields of the object.

InsPolicyTransactionDetail

Represents the details of an insurance policy transaction. This object is available in API version 55.0 and later.

Supported Calls

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

Fields

Field	Details
`InsurancePolicyTransactionId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The insurance policy transaction associated with the insurance policy transaction detail. This is a relationship field. **Relationship Name** InsurancePolicyTransaction **Relationship Type** Lookup **Refers To** InsurancePolicyTransaction
`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** Create, Filter, Group, idLookup, Sort, Update

Field	Details
	Description The name of the insurance policy transaction detail record.
`ReferenceObjectId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The coverage, insured item, or participant record associated with the insurance policy transaction detail. This is a polymorphic relationship field. **Relationship Name** ReferenceObject **Relationship Type** Lookup **Refers To** InsurancePolicyAsset, InsurancePolicyCoverage, InsurancePolicyParticipant

Associated Objects

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

InsPolicyTransactionDetailChangeEvent on page 1009
Change events are available for the object in API version 62.0 and later.

InsPolicyTransactionDetailFeed on page 1013
Feed tracking is available for the object.

InsPolicyTransactionDetailHistory on page 1021
History is available for tracked fields of the object.

InsPolicyTransactionDetailOwnerSharingRule on page 1026
Sharing rules are available for the object.

InsPolicyTransactionDetailShare on page 1029
Sharing is available for the object.

InsuranceAsyncBulkRecordDetail

This object is available in API version 64.0 and later.

Supported Calls

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

Fields

Field	Details
AdditionalInformation	**Type** textarea **Properties** Nillable **Description** Additional information related to Insurance Async Bulk Record Detail record processing. For example, a JSON key value pair that is captured for mode detailed analysis.
Description	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The short description related to the Insurance Async Bulk Record Detail record processing. For example: Insurance Policy creation failed for Group Census Member.
InsuranceAsyncBulkRequestItemId	**Type** reference **Properties** Filter, Group, Sort **Description** The reference record that's processed in the associated Insurance Async Bulk Request. This field is a relationship field. **Relationship Name** InsuranceAsyncBulkRequestItem **Relationship Type** Master-detail **Refers To** InsuranceAsyncBulkRequestItem (the master object)
Name	**Type** string **Properties** Filter, Group, idLookup, Sort **Description** The name of the Insurance Async Bulk Record Detail.
ReferenceRecordId	**Type** reference

Field	Details
	Properties Filter, Group, Sort **Description** The reference record that's processed in the associated Insurance Async Bulk Request. This field is a polymorphic relationship field. **Relationship Name** ReferenceRecord **Refers To** GroupCensus, GroupCensusMember, InsurancePolicy, QuoteLineItem
`SourceSystemIdentifier`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The unique identifier of the reference record in the source system.
`Status`	**Type** picklist **Properties** Filter, Group, Restricted picklist, Sort **Description** Specifies the status of the Insurance Async Bulk Record Detail record. Possible values are: • `Failed` • `In Progress` • `Scheduled` • `Success`

Associated Objects

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

InsuranceAsyncBulkRecordDetailHistory on page 1021
History is available for tracked fields of the object.

InsuranceClaimAsset

A junction object that associates the Claim object with the InsurancePolicyAsset object. You see this object only if you have enabled the Use Many-to-Many Relationships org pref.

Supported Calls

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

Fields

Field	Details
`ClaimId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The ID of the originating claim.
`InsurancePolicyAssetId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the asset associated with this claim.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, Sort **Description** An auto-generated number assigned to this record.

Field	Details
`SourceSystem`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the source system this record was obtained from.
`SourceSystemIdentifier`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of this record in the source system.

Associated Objects

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

InsuranceClaimAssetFeed
Feed tracking is available for the object.

InsuranceClaimAssetHistory
History is available for tracked fields of the object.

InsuranceContract

Represents insurance-specific contract information. Extension of Contract object, specifically for the insurance industry. This object is available in API version 55.0 and later.

Supported Calls

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

Fields

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

Field	Details
	Description The brokerage agency associated with the insurance contract. This is a relationship field. **Relationship Name** BrokerageAgency **Relationship Type** Lookup **Refers To** Producer
`BusinessLicenseId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Agency license associated with the insurance contract. This is a relationship field. **Relationship Name** BusinessLicense **Relationship Type** Lookup **Refers To** BusinessLicense
`ContractId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The contract associated with the insurance contract. This is a relationship field. **Relationship Name** Contract **Relationship Type** Lookup **Refers To** Contract
`EnrollmentCensusId`	**Type** reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The enrollment group census associated with the insurance contract used during enrollment. This is a relationship field. **Relationship Name** EnrollmentCensus **Relationship Type** Lookup **Refers To** GroupCensus
`EnrollmentEndDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when enrollment ends for the plans in the insurance contract.
`EnrollmentStartDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when enrollment starts for the plans in the insurance contract.
`EnrollmentWaitingPeriod`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The waiting period in days after joining date before enrollment can begin.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last accessed this record, a record related to this record, or a list view.

Field	Details
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last viewed this record or list view.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Name of the insurance contract.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The owner associated with the insurance contract. This is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`ProducerId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The producer or broker associated with the insurance contract. This is a relationship field. **Relationship Name** Producer **Relationship Type** Lookup **Refers To** Producer

Field	Details
`UnderwriterId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The underwriter associated with the insurance contract. This is a relationship field. **Relationship Name** Underwriter **Relationship Type** Lookup **Refers To** User

Associated Objects

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

InsuranceContractChangeEvent on page 1009
Change events are available for the object in API version 62.0 and later.

InsuranceContractFeed on page 1013
Feed tracking is available for the object.

InsuranceContractHistory on page 1021
History is available for tracked fields of the object.

InsuranceContractOwnerSharingRule on page 1026
Sharing rules are available for the object.

InsuranceContractShare on page 1029
Sharing is available for the object.

InsuranceContributionPlan

Represents all contributions made by an employee towards their insurance policy or insurance policy coverage. This object is available in API version 61 and later.

Supported Calls

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

Fields

Field	Details
`AdditionalInformation`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The additional information about the contribution plan.
`ContributionFrequency`	**Type** picklist **Properties** Create, Filter, Group, Sort, Update **Description** Specifies the contribution frequencys. Possible values are: • `Annually` • `Monthly` • `Quarterly`
`CurrencyIsoCode`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** If multiple currencies are enabled, this field contains the currency ISO code associated with the record. Possible values are: • `EUR`—Euro • `GBP`—British Pound • `USD`—U.S. Dollar The default value is `USD`.
InsurancePolicyCoverageId	The insurance policy coverage that's associated with the insurance contribution plan.
InsurancePolicyId	The insurance policy that's associated with the insurance contribution plan.
`IsNonContributory`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	Description Indicates whether the employee contributes to the plan or not. The default value is `false`.
`IsPreTax`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the contribution is pre tax or not. The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last viewed this record or list view. If this value is null, and `LastReferenceDate` is not null, the user accessed this record or list view indirectly.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the plan.

Associated Objects

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

InsuranceContributionPlanChangeEvent on page 1009
Change events are available for the object in API version 62.0 and later.

InsuranceContributionPlanFeed on page 1013
Feed tracking is available for the object.

InsuranceContributionPlanHistory on page 1021
History is available for tracked fields of the object.

InsuranceContributionPlanOwnerSharingRule on page 1026
Sharing rules are available for the object.

InsuranceContributionPlanShare on page 1029
Sharing is available for the object.

InsurancePolicy

Represents the type of insurance policy, such as auto, home, life, or annuity.

Supported Calls

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

Fields

Field	Details
`ActualRenewalDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The actual renewal date of the policy.
`AuditTerm`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The frequency of the audit. For example, monthly, semi-monthly, quarterly, semi-annually, or annually.
`BillingCarrierAccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The name of the Billing Carrier Account associated with the Insurance Policy. When the company that sells the policy also writes the policy, then the billing carrier is the same as the writing carrier. This field is a relationship field. **Relationship Name** BillingCarrierAccount **Relationship Type** Lookup **Refers To** Account
`BillingType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the type of biling for the policy. Possible values are:
`CancellationDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date the insurance policy was canceled.
`CancellationReason`	**Type** textarea **Properties** Create, Nillable, Update **Description** The reason for canceling the insurance policy.
`CancellationReasonType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The category that the cancellation reason belongs to.

Field	Details
CashSurrenderValue	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The cash surrender value of the insurance policy.
ChangeSubtype	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** A further categorization of the change type. For example, childbirth, marriage.
ChangeType	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of the change in the policy. For example: life event, house renovation.
CommissionFrequency	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The frequency of receiving commission from the carrier.
CommissionPercent	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** The percentage of policy premium to be earned as commission by the brokerage firm.
CurrentDueAmount	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The current due amount for the policy.

Field	Details
DateRenewed	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date on which the policy was last renewed.
Discount	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The discount that was given on the policy.
EffectiveDate	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date the policy is in effect.
EffectiveFromDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the policy becomes effective.
EffectiveToDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date until when the policy remains effective.
ExpectedRevenueAmount	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The revenue amount that the brokerage firm is expected to earn from the policy.

Field	Details
`EmployeeContribution`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The employee's contribution towards the insurance premium value.
`EmployerContribution`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The employer's contribution towards the insurance premium value.
`ExpirationDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date the policy expires.
`FinalRenewalDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The final date on which the policyholder can renew the insurance policy.
`FundingType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies how the policy is being funded. Possible values are: • `Fully Insured` • `Level Funded` • `Self Funded`
`GrossWrittenPremium`	**Type** currency

Field	Details
	Properties Create, Filter, Nillable, Sort, Update **Description** The total expected premium amount for the insurance policy over the policy period.
`HasAnyAutoCoverage`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the insurance policy has an Any Auto coverage, which extends the coverage to hired and other non-owned vehicles. The default value is False.
`IntermediaryAccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The Intermediary Account associated with the Insurance Policy. This field is a relationship field. **Relationship Name** IntermediaryAccount **Relationship Type** Lookup **Refers To** Account
`IsActive`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort **Description** Indicates whether the policy is active. The default value is False. Creating or updating an InsurancePolicy sets `IsActive` automatically based on the `Status` field value. For example, you can set `IsActive` to False by setting `Status` to Inactive.
`IsLoanEligibile`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	Description Indicates whether a loan can be requested against the insurance policy. The default value is False.
IsPolicyEditLocked	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the application locks the policy record. The default value is False.
IsRenewedPolicy	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the policy is a renewed policy. The default value is False.
LastReferencedDate	**Type** dateTime **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.
LineOfBusiness	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The line of business associated with the policy.
LineOfCoverage	**Type** picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The coverage type of the policy.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The insurance policy number.
`NameInsuredId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The name of the primary insured.
`OriginalEffectiveDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date the original policy went into effect. This field is available from API version 51.0 and later.
OriginalEffectiveFromDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the original policy became effective.
OriginalEffectiveToDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date until when the original policy remains effective.

Field	Details
`OriginalExpirationDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** Expiration date of the original policy. This field is available from API version 51.0 and later.
`OriginalPolicyId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the original insurance policy. This field is available from API version 51.0 and later.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the record owner.
`PaidToDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date up to which the policy is paid for. This field is available from API version 51.0 and later.
`ParentPolicyId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the parent policy that covers this policy. For example, a parent policy can cover an auto policy and home policy.
`PastDueAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description The amount past due for the policy.
PaymentDueDate	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The due date for the next payment of the premium.
PlannedRenewalDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The expected renewal date of the policy.
PlanTier	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The class that the insurance policy belongs to. For example, silver, gold, or platinum.
PlanType	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of the insurance policy plan. For example, single life, joint last-to-die, or joint first-to-die (primarily applicable for term insurance).
PolicyCode	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The code that's unique for the policy across all versions.
PolicyDescription	**Type** textarea

Field	Details
	Properties Create, Nillable, Update **Description** The description of the insurance policy.
`PolicyName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the insurance policy.
`PolicyTerm`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The time period for which the policy provides coverage. This field is available from API version 51.0 and later. Note: Salesforce services support only annual policy terms. However, you can use the other policy term values in custom implementations. For more information, see Considerations and Limitations for Insurance Policies.
`PolicyType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of the insurance policy. For example, home, auto, annuity, or life.
`PremiumAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The premium paid by the policy owner for the current billing period.
`PremiumCalculationMethod`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The premium calculation method for a payment period. This field is available from API version 51.0 and later. Possible values are: • `Daily` • `Modal`
`PremiumFrequency`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The frequency of the premium payment or billing. For example, monthly, semi-monthly, quarterly, semi-annually, or annually.
`PremiumPaymentType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of premium payment, such as Advance or Arrears. This field is available from API version 51.0 and later. Possible values are: • `Advance` • `Arrears`
`PreviousPremium`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The premium of the policy before it was renewed.
`PreviousRenewalDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The most recent renewal date for the insurance policy.

Field	Details
PriorPolicyId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the insurance policy before it was renewed.
ProducerId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the agency or the agent who sold the policy.
ProductId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The product that this policy belongs to. For example, if the customer buys a silver auto policy, this field looks up to the silver auto product in the Product object.
RatingDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date to determine the rating details on a mid-term adjustment, endorsement, or out-of-sequence endorsement to a policy.
ReferencePolicyNumber	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The reference number of the insurance policy that is renewed when the policy term tracking is continued across multiple policy versions. For example, if a limit is a "Lifetime Limit", then the policy term tracking is tracked across all versions of the policy.
RenewalChannel	**Type** picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The channel used to renew the insurance policy. Possible values are: • `Chatbot` • `Mobile` • `Phone` • `Web`
`RenewalDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The next expected policy renewal date. The actual renewal date may be different.
`SaleDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date the policy was sold.
`ServicingOffice`	**Type** address **Properties** Filter, Nillable **Description** The address of the office that issued the policy and that services the policy. This is a compound field of type Address and combines these fields: ServicingOfficeCity, ServicingOfficeCountry, ServicingOfficeGeocodeAccuracy, ServicingOfficeLatitude, ServicingOfficeLongitude, ServicingOfficePostalCode, ServicingOfficeState, and ServicingOfficeStreet. For more information, see Address Compound Fields.
`SourceOpportunityId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the opportunity from which the policy was created.

Field	Details
SourceSystem	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the source system this record was obtained from.
SourceSystemIdentifier	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** The ID of this record in the source system.
StandardFeeAmount	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The expected fee for the policy over the policy period. This field is available from API version 51.0 and later.
StandardPremiumAmount	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The expected premium for the policy over the policy period. This field is available from API version 51.0 and later.
StandardTaxAmount	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The expected tax on the policy over the policy period. This field is available from API version 51.0 and later.
Status	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The status of the insurance policy.
`Substatus`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Sort, Update **Description** The carrier system's substatus code for the insurance policy.
`TaxesSurcharges`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The taxes and surcharges levied on the premium for the insurance policy.
`TermFeeAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The expected fee for the policy over the policy period, prorated based on the policy's effective dates. This field is available from API version 51.0 and later.
`TermPremiumAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The expected premium for the policy over the policy period, prorated based on the policy's effective dates. This field is available from API version 51.0 and later.
`TermTaxAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The expected tax on the policy over the policy period, prorated based on the policy's effective dates. This field is available from API version 51.0 and later.

Field	Details
`TotalStandardAmount`	**Type** currency **Properties** Filter, Nillable, Sort **Description** The sum of the expected premium, fee, and tax for the policy over the policy period. This field is available from API version 51.0 and later. This is a calculated field.
`TotalSumInsured`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The total insured amount. This field is available from API version 51.0 and later.
`TotalTermFeeAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The current total term fees of all policy versions.
`TotalTermPremiumAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The current total term premium of all policy versions.
`TotalTermTaxAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The current total term taxes of all policy versions.
`UnderwritingEntityId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Legal entity that underwrote the insurance policy.
`UniversalPolicyNumber`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** A number that uniquely identifies the policy across different source systems.
`WritingCarrierAccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The Writing Carrier Account associated with the Insurance Policy. This field is a relationship field. **Relationship Name** WritingCarrierAccount **Relationship Type** Lookup **Refers To** Account

Associated Objects

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

InsurancePolicyChangeEvent (API version 61.0)
Change events are available for the object.

InsurancePolicyFeed
Feed tracking is available for the object.

InsurancePolicyHistory
History is available for tracked fields of the object.

InsurancePolicyOwnerSharingRule
Sharing rules are available for the object.

InsurancePolicyShare
Sharing is available for the object.

InsurancePolicyAsset

Represents the customer property insured through the insurance policy.

Supported Calls

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

Fields

Field	Details
`AssetCode`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The unique code of the insurance policy asset across all the policy versions.
`AssetName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The insured customer property. This field is available from API version 51.0 and later.
`CustomerPropertyId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the insured customer property.
`EffectiveFromDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date from when the asset becomes active on the policy.
`EffectiveToDate`	**Type** date

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The date after when the asset becomes inactive on the policy.
`InsurancePolicyId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The ID of the insurance policy that covers this customer property.
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the insurance policy asset is active. The default value is 'false'.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, Sort **Description** An auto-generated number assigned to this record.

Field	Details
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the record owner.
`PrimaryPolicyParticipantId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the primary participant on the insurance policy. This field is available from API version 51.0 and later.
`ProductId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The product associated with the asset. This field is a relationship field.
`RelatedInsurancePolicyAssetId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The related insurance policy asset id associated with the insurance policy asset. This field is available from API version 54.0 and later. This is a relationship field. **Relationship Name** RelatedInsurancePolicyAsset **Relationship Type** Lookup **Refers To** InsurancePolicyAsset
`SourceSystem`	**Type** string

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The name of the source system this record was obtained from.
`SourceSystemIdentifier`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of this record in the source system.
`StandardFeeAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The expected fee for the policy over the policy period. This field is available from API version 51.0 and later.
`StandardPremiumAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The expected premium for the policy over the policy period. This field is available from API version 51.0 and later.
`StandardTaxAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The expected tax on the policy over the policy period. This field is available from API version 51.0 and later.
`TermFeeAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description The expected fee for the policy over the policy period, prorated based on the policy's effective dates. This field is available from API version 51.0 and later.
`TermPremiumAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The expected premium for the policy over the policy period, prorated based on the policy's effective dates. This field is available from API version 51.0 and later.
`TermTaxAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The expected tax on the policy over the policy period, prorated based on the policy's effective dates. This field is available from API version 51.0 and later.
`TotalStandardAmount`	**Type** currency **Properties** Filter, Nillable, Sort **Description** The sum of the expected premium, fee, and tax for the policy over the policy period. This field is available from API version 51.0 and later. This is a calculated field.
`TotalTermAmount`	**Type** currency **Properties** Filter, Nillable, Sort **Description** The sum of the expected premium, tax, and fee for the policy over the policy period, prorated based on the policy's effective dates. This field is available from API version 51.0 and later. This is a calculated field.

Associated Objects

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

InsurancePolicyAssetChangeEvent on page 1009
Change events are available for the object in API version 62.0 and later.

InsurancePolicyAssetFeed
Feed tracking is available for the object.

InsurancePolicyAssetHistory
History is available for tracked fields of the object.

InsurancePolicyAssetOwnerSharingRule
Sharing rules are available for the object.

InsurancePolicyAssetShare
Sharing is available for the object.

InsurancePolicyAttribute

Represents attributes for insurance policy. This object is available in API version 63.0 and later.

Supported Calls

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

Fields

Field	Details
`AttributeDefinitionId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The attribute definition associated with the Insurance Policy Attribute. This field is a relationship field. **Relationship Name** AttributeDefinition **Refers To** AttributeDefinition
`AttributeName`	**Type** string **Properties** Filter, Group, idLookup, Nillable, Sort **Description** The name of the attribute.

Field	Details
`AttributePicklistValueId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The attribute picklist value associated with the Insurance Policy Attribute. This field is a relationship field.
`AttributeValue`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The value of the attribute.
`InsurancePolicyId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The insurance policy associated with the Insurance Policy Attribute. This field is a relationship field.

InsurancePolicyCoverage

A junction object that associates the InsurancePolicy object with the ProductCoverage object.

Supported Calls

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

Fields

Field	Details
`BenefitPaymentFrequency`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The frequency of the payment if the benefit or coverage entails a recurring payout to the insured. For example, monthly, semi-monthly, quarterly, semi-annually, or annually.
`Category`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The category that the coverage belongs to. For example, benefit, clause, deductible, rider.
`CategoryCode`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** A carrier-specific code that identifies the coverage. For example, benefit, clause, or deductible.
`CategoryGroup`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The specific category group. For example, for a liability coverage record, benefit is the category and liability is the category group.
`CategoryGroupType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of the category group.
`ContractGroupPlanId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The contract group plan associated with the insurance policy coverage.
`CoverageCode`	**Type** string

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The unique code of the insurance policy coverage across all the policy versions.
`CoverageName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the coverage.
`DeathBenefitOptionType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The method for the payment of death benefit.
`DeductibleAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The deductible amount that the customer must pay.
`Description`	**Type** textarea **Properties** Create, Nillable, Update **Description** The description of the coverage.
`Discount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The discount that was given on the coverage or the benefit.
`EffectiveDate`	**Type** dateTime

Field	Details
	Properties Create, Filter, Nillable, Sort, Update **Description** The date from which the coverage is in effect.
`ExpirationDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date on which the coverage expires.
`IncomeOptionType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of the income option given to the policy participant. For example, periodic payment is an income option type, and annuity is an income option.
`InsurancePolicyAssetId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The asset covered by this coverage.
`InsurancePolicyId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The insurance policy associated with this coverage.
`InsurancePolicyParticipantId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The insurance policy participant associated with this coverage.

Field	Details
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`LimitAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The limit of the fixed coverage amount. For example, uninsured motorist coverage of USD 1000.
`LimitDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date from which the coverage limit is in effect. For example, an annuity benefit is valid only after the insured is 60 years old.
`LimitPercentage`	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** The percentage of the actuals covered by this coverage.
`LimitRange`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The range of the coverage limit. For example, bodily injury coverage with limits as USD 100,000 per person and USD 300,000 per accident.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, Sort **Description** An auto-generated number assigned to this record.
`PremiumAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The premium paid by the customer for this coverage.
`SourceSystem`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the source system this record was obtained from.
`SourceSystemIdentifier`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of this coverage record in the source system.
`StandardFeeAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The expected fee for the policy over the policy period. This field is available from API version 51.0 and later.
`StandardPremiumAmount`	**Type** currency

Field	Details
	Properties Create, Filter, Nillable, Sort, Update **Description** The expected premium for the policy over the policy period. This field is available from API version 51.0 and later.
StandardTaxAmount	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The expected tax on the policy over the policy period. This field is available from API version 51.0 and later.
TermFeeAmount	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The expected fee for the policy over the policy period, prorated based on the policy's effective dates. This field is available from API version 51.0 and later.
TermPremiumAmount	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The expected premium for the policy over the policy period, prorated based on the policy's effective dates. This field is available from API version 51.0 and later.
TermTaxAmount	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The expected tax on the policy over the policy period, prorated based on the policy's effective dates. This field is available from API version 51.0 and later.
TotalStandardAmount	**Type** currency **Properties** Filter, Nillable, Sort

Field	Details
	Description The sum of the expected premium, fee, and tax for the policy over the policy period. This field is available from API version 51.0 and later. This is a calculated field.

Associated Objects

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

InsurancePolicyCoverageChangeEvent on page 1009
Change events are available for the object in API version 62.0 and later.

InsurancePolicyCoverageFeed
Feed tracking is available for the object.

InsurancePolicyCoverageHistory
History is available for tracked fields of the object.

InsurancePolicyCoverageOwnerSharingRule on page 1026
Sharing rules are available for the object.

InsurancePolicyCoverageShare on page 1029
Sharing is available for the object.

InsurancePolicyMemberAsset

A junction object that associates the InsurancePolicyAsset object with the InsurancePolicyParticipant object. You see this object only if you've enabled the Use Many-to-Many Relationships org pref.

Supported Calls

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

Fields

Field	Details
`InsurancePolicyAssetId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The ID of the insured asset.

Field	Details
`InsurancePolicyId`	**Type** reference **Properties** Filter, Group, Nillable, Sort **Description** The ID of the insurance policy associated with the asset. This field is available from API version 51.0 and later.
`InsurancePolicyParticipantId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The ID of the insured policy participant.
`IsAssetIsParent`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the asset is the parent of the insurance (true) or the participant (false). The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string

Field	Details
	Properties Autonumber, Defaulted on create, Filter, Sort **Description** An auto-generated number assigned to this record.
`SourceSystem`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the source system this record was obtained from.
`SourceSystemIdentifier`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of this record in the source system.

Associated Objects

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

InsurancePolicyMemberAssetChangeEvent on page 1009
Change events are available for the object in API version 62.0 and later.

InsurancePolicyMemberAssetFeed
Feed tracking is available for the object.

InsurancePolicyMemberAssetHistory
History is available for tracked fields of the object.

InsurancePolicyMemberAssetOwnerSharingRule on page 1026
Sharing rules are available for the object.

InsurancePolicyMemberAssetShare on page 1029
Sharing is available for the object.

InsurancePolicyParticipant

A junction object that associates the InsurancePolicy object with the Account object. This object represents the participants of an insurance policy. Insurance policy participants include policy owners and beneficiaries.

Supported Calls

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

Fields

Field	Details
`BeneficiarySharePercentage`	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** The percentage of the total benefits that goes to the nominee.
`EffectiveDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date from which the participant is active on the policy.
`EffectiveFromDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date from when the participant becomes active on the policy.
`EffectiveToDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date after when the participant becomes inactive on the policy.
`ExpirationDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date from which the participant is inactive on the policy.

Field	Details
InsurancePolicyId	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The ID of the insurance policy.
IsActiveParticipant	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the participant is an active participant on the policy. The default value is False.
IsMinorBeneficiary	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the nominee is a minor. The default value is False.
IsPolicyholder	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort **Description** Indicates whether this client owns the policy or is just a participant on the policy. This field is available from API version 51.0 and later.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort

Field	Details
	Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`LegalGuardianId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The legal guardian of the minor beneficiary. This can be a business account or a person account.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, Sort **Description** An auto-generated number assigned to this record.
`ParticipantCode`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The unique code of the insurance policy participant across all the policy versions.
`ParticipantName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the participant of the insurance policy.
`PrimaryParticipantAccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the primary participant's account.
`PrimaryParticipantContactId`	**Type** reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the primary participant's contact.
`ProductId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The product associated with the participant. This field is a relationship field.
`RelatedInsPolicyParticipantId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The related insurance policy participant. This field is a relationship field.
`RelatedParticipantAccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the related participant's account.
`RelatedParticipantContactId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the related participant's contact.
`RelationshipToInsured`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The relationship of the nominee with the insured.

Field	Details
`Role`	**Type** multipicklist **Properties** Create, Filter, Update **Description** The roles that the participant has in the policy. For example, owner, beneficiary, driver.
`SourceSystem`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the source system this record was obtained from.
`SourceSystemIdentifier`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of this record in the source system.
`StandardFeeAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The expected fee for the policy over the policy period. This field is available from API version 51.0 and later.
`StandardPremiumAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The expected premium for the policy over the policy period. This field is available from API version 51.0 and later.
`StandardTaxAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description The expected tax on the policy over the policy period. This field is available from API version 51.0 and later.
`TermFeeAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The expected fee for the policy over the policy period, prorated based on the policy's effective dates. This field is available from API version 51.0 and later.
`TermPremiumAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The expected premium for the policy over the policy period, prorated based on the policy's effective dates. This field is available from API version 51.0 and later.
`TermTaxAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The expected tax on the policy over the policy period, prorated based on the policy's effective dates. This field is available from API version 51.0 and later.
`TotalStandardAmount`	**Type** currency **Properties** Filter, Nillable, Sort **Description** The sum of the expected premium, fee, and tax for the policy over the policy period. This field is available from API version 51.0 and later. This is a calculated field.
`TotalTermAmount`	**Type** currency **Properties** Filter, Nillable, Sort

Field	Details
	Description The sum of the expected premium, tax, and fee for the policy over the policy period, prorated based on the policy's effective dates. This field is available from API version 51.0 and later. This is a calculated field.

Associated Objects

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

InsurancePolicyParticipantChangeEvent on page 1009
Change events are available for the object in API version 62.0 and later.

InsurancePolicyParticipantFeed
Feed tracking is available for the object.

InsurancePolicyParticipantHistory
History is available for tracked fields of the object.

InsurancePolicyParticipantOwnerSharingRule on page 1026
Sharing rules are available for the object.

InsurancePolicyParticipantShare on page 1029
Sharing is available for the object.

InsurancePolicySurcharge

Represents the charges calculated for an insurance policy and its related assets, coverages, and participants in a region. This object is available in API version 51.0 and later.

Supported Calls

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

Fields

Field	Details
`ApplicableObjectType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the item on which the surcharge was applied. Possible values are:

Field	Details
	• `InsurancePolicyAsset`—Insurance Policy Asset • `InsurancePolicyCoverage`—Insurance Policy Coverage • `InsurancePolicyParticipant`—Insurance Policy Participant
`InsurancePolicyAssetId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The insurance policy asset associated with the surcharge.
`InsurancePolicyCoverageId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The insurance policy coverage associated with the surcharge.
`InsurancePolicyId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The insurance policy associated with the surcharge.
`InsurancePolicyParticipantId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The insurance policy participant associated with the surcharge.
`InsurancePolicyTransactionId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The insurance policy transaction associated with the surcharge.
`IsProrationAllowed`	**Type** boolean

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the term surcharge amount is prorated based on the policy duration. The default value is `false`.
`IsRefundAllowed`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the term surcharge amount is eligible for refund. The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the insurance policy surcharge.
`ProductSurchargeId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The product surcharge associated with an insurance policy surcharge. This field is a relationship field.
SourceSystem	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the system from which this insurance policy surcharge was obtained.
SourceSystemIdentifier	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** The ID of the insurance policy surcharge record in the source system. This field is unique within your organization.
SurchargeAmount	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The surcharge amount calculated for an insurance policy, insurance policy asset, insurance policy coverage, or an insurance policy participant. This surcharge is calculated based on the tax and fee structure defined for products or can be retrieved from a source system.
TermSurchargeAmount	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The surcharge amount calculated for the duration of an insurance policy, insurance policy asset, insurance policy coverage, or insurance policy participant.
Type	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the type of surcharge.

Field	Details
	Possible values are: • `Fee` • `Tax`

Associated Objects

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

InsurancePolicySurchargeChangeEvent on page 1009
Change events are available for the object in API version 62.0 and later.

InsurancePolicySurchargeHistory on page 1021
History is available for tracked fields of the object.

InsurancePolicySurchargeOwnerSharingRule on page 1026
Sharing rules are available for the object.

InsurancePolicySurchargeShare on page 1029
Sharing is available for the object.

InsurancePolicyTransaction

Represents a transaction related to a change that affects the premium of an insurance policy, such as an endorsement, renewal, or cancellation. This object is available in API version 51.0 and later.

Supported Calls

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

Fields

Field	Details
`Category`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the transaction category for the insurance policy. Possible values are: • `Cancellation` • `Endorsement`

Field	Details
	• `Issuance` • `Reinstatement` • `Renewal`
`EffectiveFromDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date from when the transaction becomes effective.
`InsurancePolicyId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The insurance policy this transaction is related to.
`InsurancePolicyVersionId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The current version of the insurance policy.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string

Field	Details
	Properties Create, Filter, Group, idLookup, Sort, Update **Description** The name of the transaction.
`ParentTransactionId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The transaction this insurance policy transaction is related to. For example, a charge transaction is the parent transaction for a payment made against that charge.
`PostedDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the customer was charged for the insurance policy.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The current status of a policy transaction. Possible values are: • `Approved` • `Pending` • `Reversed`
`TotalTransactionAmount`	**Type** currency **Properties** Filter, Nillable, Sort **Description** The total amount of transaction, including transaction fee and tax. This is a calculated field.
`TransactionAmount`	**Type** currency

Field	Details
	Properties Create, Filter, Nillable, Sort, Update **Description** The transaction amount.
`TransactionEffectiveDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date of the transaction.
`TransactionFeeAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The prorated fee for the transaction.
`TransactionNumber`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** An identifier for the transaction from an external system.
`TransactionPostedDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date on which the amount was charged to the customer.
`TransactionTaxAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The prorated tax on the transaction amount.
`Type`	**Type** picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the type of transaction. Possible values are: • `Cancellation` • `Credit` • `Deposit` • `Endorsement` • `Loan` • `Premium Payment` • `Renewal` • `Surcharge` • `Surrender` • `Withdrawal`

Associated Objects

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

InsurancePolicyTransactionChangeEvent on page 1009
Change events are available for the object in API version 62.0 and later.

InsurancePolicyTransactionFeed on page 1013
Feed tracking is available for the object.

InsurancePolicyTransactionHistory on page 1021
History is available for tracked fields of the object.

InsurancePolicyTransactionOwnerSharingRule on page 1026
Sharing rules are available for the object.

InsurancePolicyTransactionShare on page 1029
Sharing is available for the object.

InsuranceProfile

Represents the insurance-related attributes for the insured member.

Supported Calls

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

Fields

Field	Details
ContactId	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The ID of the contact related to this insurance profile.
IsAlcoholAbuser	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the person has a history of alcohol abuse. The default value is False.
IsAlcoholConsumer	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the person consumes alcohol. The default value is False.
IsDrugAbuser	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the person has a history of drug abuse. The default value is False.
IsGoodDriver	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the person is categorized as a good driver. The default value is False.
IsGoodStudent	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	Description Indicates whether the person is categorized as a good student. The default value is False.
`IsHighRiskOccupation`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the person's current employment is a high-risk job. The default value is False.
`IsLicenseSuspended`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the insured member's driver's license was ever suspended. The default value is False.
`IsTobaccoConsumer`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the person consumes tobacco. The default value is False.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.

Field	Details
`MajorCitationCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The number of major citations the person had when the policy was created.
`MinorCitationCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The number of minor citations the person had when the policy was created.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, Sort **Description** An auto-generated number assigned to this record.
`NumberOfAccidents`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The number of accidents the insured member was involved in.
`SourceSystem`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the source system this record was obtained from.
`SourceSystemIdentifier`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of this record in the source system.

Associated Objects

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

InsuranceProfileChangeEvent on page 1009
Change events are available for the object in API version 62.0 and later.

InsuranceProfileFeed
Feed tracking is available for the object.

InsuranceProfileHistory
History is available for tracked fields of the object.

InsuranceProfileOwnerSharingRule on page 1026
Sharing rules are available for the object.

InsuranceProfileShare on page 1029
Sharing is available for the object.

InsuranceRatePlan

Represents a rate plan for an employee's insurance. This object is available in API version 61 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** If multiple currencies are enabled, this field contains the currency ISO code associated with the record. Possible values are: • `EUR`—Euro • `GBP`—British Pound • `USD`—U.S. Dollar The default value is `USD`.
`ExpectedRevenueAmount`	**Type** currency

Field	Details
	Properties Create, Filter, Nillable, Sort, Update **Description** The revenue amount that the brokerage is expected to earn from the rate plan.
`Frequency`	**Type** picklist **Properties** Create, Filter, Group, Sort, Update **Description** Specifies the frequency of premium, fees, or premium equivalents for the insurance under specified rate plan. Possible values are: • `Annually` • `Monthly` • `Quarterly`
`GeoStateId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The location where the rate plan is applicable. This field is a relationship field. **Relationship Name** GeoState **Refers To** GeoState
InsurancePolicyCoverageId	The insurance policy coverage associated with the rate plan.
InsurancePolicyId	The insurance policy associated with the rate plan.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.

Field	Details
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last viewed this record or list view. If this value is null, and `LastReferenceDate` is not null, the user accessed this record or list view indirectly.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the rate plan.
`TotalFeeAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The total fee amount for the rate plan.
`TotalPremiumAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The total premium amount of the insurance for the specified rate plan.
`TotalPremiumEqvAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The total premium equivalent amount that's used for a fully insured equivalent rate plan.
`Type`	**Type** picklist **Properties** Create, Filter, Group, Sort, Update

Field	Details
	Description Specifies the type of insurance rate plan that determines the calculation method for premium, fee, or premium equivalent

Associated Objects

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

InsuranceRatePlanChangeEvent on page 1009
Change events are available for the object in API version 62.0 and later.

InsuranceRatePlanHistory on page 1021
History is available for tracked fields of the object.

InsuranceRatePlanOwnerSharingRule on page 1026
Sharing rules are available for the object.

InsuranceRatePlanShare on page 1029
Sharing is available for the object.

InsuranceRatePlanCommission

Represents the commission details for the insurance rate plan. This object is available in API version 62 and later.

Supported Calls

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

Fields

Field	Details
`AmountEndRange`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The end range of amount for graded percent of premium.
`AmountStartRange`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description The start range of amount for graded percent of premium.
`CurrencyIsoCode`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** If multiple currencies are enabled, this field contains the currency ISO code associated with the record. Possible values are: • `EUR`—Euro • `GBP`—British Pound • `USD`—U.S. Dollar The default value is `USD`.
`Fee`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The commission fee when Flat Fee or Capitated Fees are selected.
`FeePercent`	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** The percentage of fee to be earned as commission when flat percentage of fee is selected.
`InsuranceRatePlanId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The insurance rate plan associated with the commission. This field is a relationship field. **Relationship Name** InsuranceRatePlan **Relationship Type** Master-detail

Field	Details
	Refers To InsuranceRatePlan (the master object)
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description**
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description**
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the commission rate plan.
`NumberEndRange`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The end range of the grade volume, which represents the employee count.
`NumberStartRange`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The start range of the grade volume, which represents the employee count.
`PremiumPercent`	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description The percentage of premium to be earned as commission when graded percent of premium or flat percent of premium is selected.
`Type`	**Type** picklist **Properties** Create, Filter, Group, Sort, Update **Description** Specifies the type of commission structure. Possible values are: • `Capitated Fee` • `Flat Fee` • `Flat Fee Percentage` • `Flat Premium Percentage` • `Graded Premium Percentage` • `Graded Volume`

Associated Objects

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

InsuranceRatePlanCommissionChangeEvent on page 1009
Change events are available for the object in API version 62.0 and later.

InsuranceRatePlanCommissionHistory on page 1021
History is available for tracked fields of the object.

InsuranceRatePlanLineItem

Represents insurance rates information that's provided by carriers specific to employees of certain tiers under certain policy or policy coverage. This object is available in API version 61 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** If multiple currencies are enabled, this field contains the currency ISO code associated with the record. Possible values are: • `EUR`—Euro • `GBP`—British Pound • `USD`—U.S. Dollar The default value is `USD`.
`EnrollmentCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The number of employees that are insured at a specific tier.
`FeeAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The fee amount for the insurance plan for a specific tier.
`InsuranceRatePlanId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The parent insurance rate plan that's associated with the line item. This field is a relationship field. **Relationship Name** InsuranceRatePlan **Relationship Type** Master-detail

Field	Details
	Refers To InsuranceRatePlan (the master object)
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last viewed this record or list view. If this value is null, and `LastReferenceDate` is not null, the user accessed this record or list view indirectly.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the line item.
`PremiumAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The premium amount for the insurance plan for a specific tier.
`PremiumEqvAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The premium equivalent amount for the insurance plan for a specific tier.
`Rate`	**Type** currency

Field	Details
	Properties Create, Filter, Nillable, Sort, Update **Description** The rate at which the employer contributes for the insurance for each employee.
`RateBasisAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The basis amount that's used to calculate the insurance rate or fee value.
`RateQualifierAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** A per unit amount that's used to calculate premiums for benefit volume or covered payroll based plans.
`Tier`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the employee tier that's used to determine the plan rate. Possible values are: • `Employee & Children` • `Employee & Family` • `Employee & Spouse` • `Employee Only`

Associated Objects

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

InsuranceRatePlanLineItemChangeEvent on page 1009
Change events are available for the object in API version 62.0 and later.

InsuranceRatePlanLineItemHistory on page 1021
History is available for tracked fields of the object.

IntegrationProviderAttr

Represents information about the attributes that are used in the definition for an integration provider. This object is available in API version 57.0 and later.

Supported Calls

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

Fields

Field	Details
`DataType`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies the data type of the attribute. Possible values are: • `Boolean` • `Date` • `DateTime`—Date Time • `Double` • `Integer` • `Percentage` • `String`
`DateTimeValue`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date time value of the attribute.
`DateValue`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date value of the attribute.

Field	Details
`Description`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description of the attribute.
`DeveloperName`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The developer name of the integration provider attribute.
`DoubleValue`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The double value of the attribute.
`IntegerValue`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The integer value of the attribute.
`IntegrationProviderDefId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The integration provider definition that's associated with the attribute. This field is a relationship field. **Relationship Name** IntegrationProviderDef **Relationship Type** Lookup **Refers To** IntegrationProviderDef

Field	Details
`IsRequired`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates if the attribute is required (true) or not (false). The default value is `false`.
`IsTrueOrFalseValue`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The value in the boolean field of the attribute. The default value is `false`.
`MasterLabel`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The master label of the attribute.
`PercentageValue`	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** The percentage value of the attribute.
`StringValue`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The string value of the attribute.

IntegrationProviderDef

Represents the definition that's applicable to an integration provider. This object is available in API version 57.0 and later.

Supported Calls

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

Fields

Field	Details
`ApexClassId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The apex class that's associated with the definition. This field is a relationship field. **Relationship Name** ApexClass **Relationship Type** Lookup **Refers To** ApexClass
`CanUseInIntegrationOrch`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the integration definition can be used in an integration orchestration (`true`) or not (`false`). The default value is `false`. Available in API version 61.0 and later.
`Description`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description about the integration provider definition.
`DeveloperName`	**Type** string **Properties** Create, Filter, Group, Sort, Update

Field	Details
	Description The developer name of the integration provider definition.
ExternalServiceOperationName	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The external service registration that's associated with the integration provider.
FileBasedApexClass	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The API name of the file-based apex class.
InputDataProcessorId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The input data processor that's associated with the integration provider. This field is a relationship field. **Relationship Name** InputDataProcessor **Relationship Type** Lookup **Refers To** OmniIntegrationProcConfig
IsActive	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the integration provider is active (true) or inactive (false). The default value is `false`.
IsManual	**Type** boolean

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the integration definition mode is manual (`true`) or automatic (`false`). The default value is `false`. Available in API version 61.0 and later.
`IsServiceTypeIntegration`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the integration definition mode is Service Type (True) or Process Type (False). The default value is `false`.
`Language`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The language of the integration provider definition.
`MasterLabel`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** A unique name of the integration provider definition.
`NamespacePrefix`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** Namespace prefix associated with this object.
`OmniUiCardConfigId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The FlexCard component associated with the integration provider. Available in API version 61.0 and later. This field is a relationship field. **Relationship Name** OmniUiCardConfig **Relationship Type** Lookup **Refers To** OmniUiCardConfig
`OutputDataProcessorId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The output data processor that's associated with the integration provider. This field is a relationship field. **Relationship Name** OutputDataProcessor **Relationship Type** Lookup **Refers To** OmniIntegrationProcConfig
`StorePayload`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies whether the JSON payload from the request and response must be saved in logs. Valid values are: • `DontPersistPayload`—The request and response samples aren't saved in logs. • `PersistPayload`—The request and response samples are saved in logs. The default value is `DontPersistPayload`. Available in API version 61.0 and later.
`Type`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update

Field	Details
	Description Specifies the type of definition that's defined for an integration provider. Possible values are: • `Apex` • `LowCode`—Low Code

IntegrationProviderDcsnRqmt

Represents a decision requirement used to create integration provider records. This object is available in API version 61.0 and later.

Supported Calls

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

Fields

Field	Details
`IntegrationProviderDefId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The integration definition associated with the integration provider decision requirement. This field is a relationship field. **Relationship Name** IntegrationProviderDef **Refers To** IntegrationProviderDef
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime

Field	Details
	Properties Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the party credit profile record.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the record owner. This field is a polymorphic relationship field. **Relationship Name** Owner **Refers To** Group, User
`RelatedObject`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** The object for which integration provider decision requirement is defined. Possible values are: • `Applicant` • `ApplicationActionItem`—Application Action Item • `ApplicationForm`—Application Form • `ApplicationFormProduct`—Application Form Product • `ApplicationFormProductDev`—Application Form Product Deviation • `ApplicationFormSellerItem`—Application Form Seller Item • `Deviation` • `InformationVerification`—Information Verification

Field	Details
	• PartyExpense—Party Expense • PartyFinancialAsset—Party Financial Asset • PartyFinancialLiability—Party Financial Liability • PartyIdentityVerification—Party Identity Verification • PartyIdentityVerificationStep—Party Identity Verification Step • PartyIncome—Party Income • PartyProfile—Party Profile • PartyScreeningStep—Party Screening Step • PartyScreeningSummary—Party Screening Summary • PersonEmployment—Person Employment • Product2—Product • devopsimpkg11__DRBatchQueue__c—Vlocity Omnistudio Data Mapper Batch Queue • devopsimpkg11__DRBulkData__c—Omnistudio Data Mapper Bulk Data • devopsimpkg11__DocumentTemplateSetting__mdt—Document Template Setting • devopsimpkg11__Interface_DRGeneric__c—Vlocity Omnistudio Data Mapper Object Interface • devopsimpkg11__PDFTronEncryptionKey__mdt—PDFTron Encryption Key • devopsimpkg11__TestResult__c—Test Result • devopsimpkg11__VlocityDataPack__c—Vlocity DataPack Object • devopsimpkg11__VlocityDocuSignTemplate__c—Vlocity DocuSign Template • devopsimpkg11__VlocityErrorLogEntry__c—Vlocity Error Log Entry • devopsimpkg11__VlocityScheduledJob__c—Vlocity Scheduled Job • devopsimpkg11__VlocityTrackingEntry__c—Vlocity Tracking Entry
RunAsUserId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The user associated with the integration provider decision requirement. This field is a relationship field. **Relationship Name** RunAsUser **Refers To** User

IntegrationProviderExecution

Represents the execution instance of an integration provider. This object is available in API version 61.0 and later.

Supported Calls

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

Fields

Field	Details
`ErrorCode`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The error code returned from the integration execution.
`ExecutionDateTime`	**Type** dateTime **Properties** Create, Filter, Sort, Update **Description** The date and time an integration is executed.
`ExecutionStepInstanceId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The instance of the integration execution. This field is a relationship field. **Relationship Name** ExecutionStepInstance **Refers To** FulfillmentStep
`IntegrationProviderDefId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update

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

Field	Details
`ReferenceObjectIdentifier`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The object referenced to execute an integration.
`RequestPayloadId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The content document that stores the request payload associated with the integration execution. This field is a relationship field. **Relationship Name** RequestPayload **Refers To** ContentDocument
`ResponsePayloadId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The content document that stores the response payload associated with the integration execution. This field is a relationship field. **Relationship Name** ResponsePayload **Refers To** ContentDocument
`Status`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies the status of the integration execution. Possible values are: • `Failed`

Field	Details
	• `In Progress` • `Not Started`—Pending • `Success`

Interaction

Represents an interaction (phone call, in-person meeting, or video conference) between two or more people (attendees), typically including at least one representative and one customer or partner. This object is available in API version 51.0 and later.

Supported Calls

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

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the account related to the customer or partner who attended the interaction.
`Description`	**Type** textarea **Properties** Create, Nillable, Update **Description** The description of the interaction.
`EndTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time that the interaction ended.
`InteractionType`	**Type** picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The type of interaction. Possible values are: • `Conference` • `Email` • `In Person` • `Phone Call`
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastSyncedDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time when a sync was performed to create or update an interaction from an email client or other solutions in Salesforce.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`LocationId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The location of the interaction.

Field	Details
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the interaction.
`ReferenceIdentifier`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** The unique reference ID of the interaction.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the record owner.
`RelatedRecordId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** This is a polymorphic relationship field. **Relationship Name** RelatedRecord **Relationship Type** Lookup **Refers To** FinancialDeal, Opportunity
`StartTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time that the interaction started.

Associated Objects

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

InteractionChangeEvent on page 1009
Change events are available for the object.

InteractionFeed on page 1013
Feed tracking is available for the object.

InteractionHistory on page 1021
History is available for tracked fields of the object.

InteractionOwnerSharingRule on page 1026
Sharing rules are available for the object.

InteractionShare on page 1029
Sharing is available for the object.

InteractionAttendee

Represents an attendee of an interaction. This object is available in API version 51.0 and later.

Supported Calls

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

Fields

Field	Details
`AttendeeResponse`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the response of the attendee to the interaction. Possible values are: • `Accepted` • `Declined` • `Awaiting Response`
`AttendeeType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The type of attendee. Possible values are: • `External` • `Internal`
`ContactId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The contact who attended the interaction.
`EmailAddress`	**Type** email **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The email address of the attendee.
`EventId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The event on Salesforce calendar for this attendee.
`InteractionId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The interaction for which this attendee record is created.
`IsOrganizer`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the attendee is the interaction organizer. The default value is 'false'.

Field	Details
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastSyncedDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time when a sync was performed to create or update an interaction from an email client or other solutions in Salesforce.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the interaction attendee.
`UserId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The user who attended the interaction.

Associated Objects

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

InteractionAttendeeChangeEvent on page 1009
Change events are available for the object.

InteractionAttendeeFeed on page 1013
Feed tracking is available for the object.

InteractionAttendeeHistory on page 1021
History is available for tracked fields of the object.

InteractionParticipant

Represents a user or User Group with whom the interaction is shared. This object is available in API version 52.0 and later.

Supported Calls

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

Fields

Field	Details
`Comments`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Notes about this participant.
`InteractionId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The call report that's shared with this user. This is a relationship field. **Relationship Name** Interaction **Relationship Type** Lookup **Refers To** Interaction
`IsActive`	**Type** boolean

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

Field	Details
ParticipantRoleId	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The role assigned to this participant. This is a relationship field. **Relationship Name** ParticipantRole **Relationship Type** Lookup **Refers To** ParticipantRole

Associated Objects

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

InteractionParticipantChangeEvent on page 1009
Change events are available for the object.

InteractionParticipantFeed on page 1013
Feed tracking is available for the object.

InteractionParticipantHistory on page 1021
History is available for tracked fields of the object.

InteractionRelatedAccount

Represents a junction between an interaction and account that's related to that interaction. This object is available in API version 57.0 and later.

Supported Calls

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

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The account of a company that's associated with the interaction. This field is a relationship field. **Relationship Name** Account **Relationship Type** Lookup **Refers To** Account
`AccountRole`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the role of the account in the interaction. Possible values are: • `Audit` • `Legal` • `Participating` • `Primary`
`Comment`	**Type** textarea **Properties** Create, Nillable, Update **Description** The description about the account that's associated with the interaction.
`InteractionId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update

Field	Details
	Description The interaction associated with the account. This field is a relationship field. **Relationship Name** Interaction **Relationship Type** Lookup **Refers To** Interaction
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the account that's related to the interaction.

Associated Objects

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

InteractionRelatedAccountChangeEvent on page 1009
Change events are available for the object.

InteractionRelatedAccountFeed on page 1013
Feed tracking is available for the object.

InteractionRelatedAccountHistory on page 1021
History is available for tracked fields of the object.

InteractionSumDiscussedAccount

Represents information about the companies discussed in an interaction. 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()`

Fields

Field	Details
`Comment`	**Type** textarea **Properties** Create, Nillable, Update **Description** Notes about the account that's associated with the interaction summary.
`DiscussedAccountId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The company or organization mentioned in the interaction summary. This is a relationship field. **Relationship Name** DiscussedAccount **Relationship Type** Lookup **Refers To** Account
`InteractionSummaryId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The interaction summary associated with the interaction summary account record.

Field	Details
	This is a relationship field. **Relationship Name** InteractionSummary **Relationship Type** Lookup **Refers To** InteractionSummary
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the interaction summary account.

Associated Objects

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

InteractionSumDiscussedAccountFeed on page 1013
Feed tracking is available for the object.

InteractionSumDiscussedAccountHistory on page 1021
History is available for tracked fields of the object.

InteractionSummary

Represents the summary of an interaction, including confidentiality information. This object is available in API version 51.0 and later.

Supported Calls

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

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the account related to the customer who attended the client interaction.
`ConfidentialityType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the level of confidentiality of the information that's recorded in this interaction summary. Possible values are: • `Confidential` • `Public`
`InteractionId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The client interaction related to the interaction summary.
`InteractionPurpose`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Specifies the purpose of the client interaction. Possible values are: • `Deal Execution` • `Meet and Greet` • `Quarterly Check-In`
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`MeetingNotes`	**Type** textarea **Properties** Create, Nillable, Update **Description** The detailed record of what transpired during the client interaction.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The title of the interaction summary, capturing the summary of the interaction.
`NextSteps`	**Type** textarea **Properties** Create, Nillable, Update

Field	Details
	Description The next steps that were decided during the interaction.
`Offering`	**Type** multipicklist **Properties** Create, Filter, Nillable, Update **Description** The offerings that were discussed in the client interaction. Possible values are: • `Debt Capital Markets` • `Equity Capital Markets` • `Mergers and Acquisitions Advisory`
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the record owner.
`PartnerAccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the account related to the partner who attended the client interaction.
`RelatedRecordId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the record such as an opportunity associated with a client interaction.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the status of the interaction summary.

Field	Details
	Possible values are: • `Draft` • `Published`

Associated Objects

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

InteractionSummaryFeed on page 1013
Feed tracking is available for the object.

InteractionSummaryHistory on page 1021
History is available for tracked fields of the object.

InteractionSummaryOwnerSharingRule on page 1026
Sharing rules are available for the object.

InteractionSummaryShare on page 1029
Sharing is available for the object.

InteractionSummaryParticipant

Represents a user with whom an interaction summary is shared. This object is available in API version 51.0 and later.

Supported Calls

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

Fields

Field	Details
`Comments`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Notes about this participant.
`InteractionSummaryId`	**Type** reference

Field	Details
	Properties Create, Filter, Group, Sort **Description** The interaction summary that's shared with this user.
IsActive	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether this participant is active.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
Name	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the interaction summary participant.
ParticipantId	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The user or group that the interaction summary is shared with.

Field	Details
ParticipantRoleId	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The role assigned to this participant.

Associated Objects

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

InteractionSummaryParticipantChangeEvent on page 1009
Change events are available for the object.

InteractionSummaryParticipantFeed on page 1013
Feed tracking is available for the object.

InteractionSummaryParticipantHistory on page 1021
History is available for tracked fields of the object.

IssuedCard

Represents information about the card issued to a customer, such as debit card, credit card, prepaid card, gift card, and any other card type. This object is available in API version 61.0 and later.

Supported Calls

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

Special Access Rules

This is a standard object and is available only when you turn on the Financial Account Management Standard Objects setting.

Fields

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

Field	Details
	Description The account associated with the card. This field is a relationship field. **Relationship Name** Account **Relationship Type** Lookup **Refers To** Account
BankIdentificationNumber	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The bank identification number on the card.
ExpiryDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date of expiry of the card.
FinancialAccountId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The financial account associated with the card. This field is a relationship field. **Relationship Name** FinancialAccount **Relationship Type** Lookup **Refers To** FinancialAccount
Format	**Type** picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the format of the card, such as Card, Virtual Card, or Token.
`IssueDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the card is issued.
`LastDigitsCardNumber`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description**
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date when a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date when a user viewed this record.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the record.
`NameOnCard`	**Type** string

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The name on the card.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The owner of this record. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`PaymentNetwork`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the payment network of the card.
`ProductId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The product associated with the card. This field is a relationship field. **Relationship Name** Product **Relationship Type** Lookup **Refers To** Product2

Field	Details
SourceSystemIdentifier	**Type** external lookup **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** The identifier of the financial account card in an external system.
Status	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the status of the card.
Type	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the card type.
ValidFromMonth	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The month from when the card is valid.
ValidFromYear	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The year from when the card is valid.
ValidUntilMonth	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The month until when the card is valid.

Field	Details
`ValidUntilYear`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The year until when the card is valid.

Associated Objects

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

IssuedCardChangeEvent on page 1009
Change events are available for the object.

IssuedCardFeed on page 1013
Feed tracking is available for the object.

IssuedCardHistory on page 1021
History is available for tracked fields of the object.

IssuedCardOwnerSharingRule on page 1026
Sharing rules are available for the object.

IssuedCardShare on page 1029
Sharing is available for the object.

LoanApplicant

Represents details of the borrower or co-borrower for the loan application. This object is available in API version 47.0 and later.

Supported Calls

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

Fields

Field	Details
`ApplicantExtIdentifier`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update

Field	Details
	Description ID that uniquely identifies imported data in an external data source (if applicable).
`AsianRaceSubType`	**Type** multipicklist **Properties** Create, Filter, Nillable, Update **Description** Borrower's Asian race. Possible values are: • `Asian Indian` • `Chinese` • `Filipino` • `Japanese` • `Korean` • `Other` • `Vietnamese`
`BorrowerType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Applicant's borrower type. Values are: • `Borrower` • `CoBorrower`
`CitizenshipStatus`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Borrower's citizenship status. Possible values are: • `Non-Permanent Resident Alien` • `Permanent Resident Alien` • `U.S. Citizen`

Field	Details
`ContactId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** Contact associated with this borrower.
`DependentCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Borrower's number of dependents.
`DependentsAge`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Ages of borrower's dependents in a comma-separated list.
`EthnicitySubType`	**Type** multipicklist **Properties** Create, Filter, Nillable, Update **Description** Borrower's ethnicity origin. Possible values are: • `Cuban` • `Mexican` • `Other` • `Puerto Rican`
`EthnicityType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Borrower's ethnicity. Possible values are:

Field	Details
	• `Hispanic or Latino` • `I do not wish to provide this information` • `Not Hispanic or Latino`
`GenderType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Borrower's gender. Possible values are: • `Female` • `I do not wish to provide this information` • `Male`
`HasMilitaryService`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the borrow is serving in the United States Armed Forces or the borrower or the borrower's deceased spouse served in the past.
`IsActiveMilitary`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether borrower is currently on active duty with the United States Armed Forces.
`IsJointCredit`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether borrower is applying for joint credit.
`IsSurvivingMilitarySpouse`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	Description Indicates whether borrower is a surviving spouse of a veteran.
`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.
`LoanApplicationId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** Loan application associated with this borrower.
`MaritalStatus`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Borrower's marital status. Possible values are: • `Married` • `Separated` • `Unmarried`
`MilitaryTourExpirationMonth`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Month that borrower's tour of service expires.
MilitaryTourExpirationYear	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Year that borrower's tour of service expires.
Name	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Name of the loan applicant.
OtherAsianRaceSubType	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Borrower's Asian race if other is specified.
OtherEthnicitySubType	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Borrower's ethnicity if other is selected.
OtherPacIslandSubType	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Borrower's native Hawaiian or Pacific Islander race if other is specified.
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	Description ID of the user who owns this record.
`PacIslandSubType`	**Type** multipicklist **Properties** Create, Filter, Nillable, Update **Description** Borrower's native Hawaiian or Pacific Islander race. Possible values are: • `Guamanian or Chamorro` • `Native Hawaiian` • `Other` • `Samoan`
`PreferredLanguage`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Borrower's preferred communication language. Possible values are: • `Chinese` • `English` • `I do not wish to respond` • `Korean` • `Other` • `Spanish` • `Tagalog` • `Vietnamese`
`RaceType`	**Type** multipicklist **Properties** Create, Filter, Nillable, Update **Description** Borrower's race. Possible values are: • `American Indian or Alaska Native`

Field	Details
	• `Asian` • `Black or African American` • `I do not wish to provide this information` • `Native Hawaiian or Other Pacific Islander` • `White`
`TribeName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Name of borrower's enrolled or principal tribe.
`WasActiveMilitary`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether borrower is currently retired, discharged, or separated from active military duty.
`WasNonActivatedService`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether borrower's only military service was as a non-activated Reserve soldier or as a non-activated member of the National Guard.

Associated Objects

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

LoanApplicantFeed
Feed tracking is available for the object.

LoanApplicantHistory
History is available for tracked fields of the object.

LoanApplicantOwnerSharingRule
Sharing rules are available for the object.

LoanApplicantShare
Sharing is available for the object.

LoanApplicantAddress

Represents borrower's or co-borrower's current address information. This object is available in API version XX.0 and later.

Supported Calls

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

Fields

Field	Details
`AddressExtIdentifier`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies imported data in an external data source (if applicable). This field is unique within your organization.
`AddressOwnership`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Identifies borrower's status at residence. Possible values are: • `Live Rent-Free` • `Own` • `Rent`
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort

Field	Details
	Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`LoanApplicantId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** Borrower associated with this applicant address.
`LoanApplicationId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Loan application associated with this applicant address.
`MonthlyRentPayment`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Borrower's monthly rent payment (if applicable).
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Name of the borrower's address.
`ResidenceAdditionalMonthCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Additional months borrower lived at this residence.
`ResidenceAddress`	**Type** address

Field	Details
	Properties Filter, Nillable **Description** Residence's physical address.
`ResidenceCity`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The address city.
`ResidenceCountry`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The address country.
`ResidenceGeocodeAccuracy`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The level of accuracy of a location's geographical coordinates compared with its physical address. A geocoding service typically provides this value based on the address's latitude and longitude coordinates.
`ResidenceLatitude`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Used with Longitude to specify the precise geolocation of the address. Acceptable values are numbers between –90 and 90 with up to 15 decimal places.
`ResidenceLongitude`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description Used with Latitude to specify the precise geolocation of the address. Acceptable values are numbers between –180 and 180 with up to 15 decimal places.
`ResidencePostalCode`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The address postal code.
`ResidenceState`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The address state.
`ResidenceStreet`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The address street.
`ResidenceYearCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Years borrower lived at this residence.
`ResidencyType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Identifies borrower's residency status at address. Possible values are: • `Former Residence` • `Mailing Address`

Field	Details
	• `Present Address`

Associated Objects

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

LoanApplicantAddressFeed
Feed tracking is available for the object.

LoanApplicantAddressHistory
History is available for tracked fields of the object.

LoanApplicantAsset

Represents a junction between a borrower and a loan application asset. This object is available in API version 47.0 and later.

Supported Calls

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

Fields

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

Field	Details
	Properties Create, Filter, Group, Sort **Description** ID of the borrower associated with the asset.
`LoanApplicationAssetId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** ID of the loan application associated with the asset.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** An auto-generated number assigned to this record.
`Role`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Sort, Update **Description** Identifies borrower's ownership role for the asset. Possible values are: • `Co-Holder` • `Primary` The default value is Co-Holder.

Associated Objects

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

LoanApplicantAssetHistory
History is available for tracked fields of the object.

LoanApplicantDeclaration

Represents financial issues like foreclosure, lawsuits, or defaults of the applicant or co-applicant. This object is available in API version 47.0 and later.

Supported Calls

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

Fields

Field	Details
`BankruptcyType`	**Type** multipicklist **Properties** Create, Filter, Nillable, Update **Description** Bankruptcy type or types (if applicable). Possible values are: • `Chapter 11` • `Chapter 12` • `Chapter 13` • `Chapter 7`
`BorrowedAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Amount of money borrowed for loan application transaction.
`DeclarationExtIdentifier`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies imported data in an external data source (if applicable). This field is unique within your organization.
`HasBorrowedMoney`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether borrower is borrowing money for loan application transaction.

Field	Details
HasDeclaredBankruptcy	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether borrower declared bankruptcy within the past seven years.
HasDeedSurrender	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether borrower conveyed title to a property in lieu of foreclosure in past 7 years.
HasOutstandingJudgement	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether there are one or more outstanding judgments against the borrower.
HasOwnershipInterest	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether borrower had ownership interest in a property in the last 3 years.
HasPastShortSale	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether borrower sold a property to a third party where lender agreed to accept amount less than total outstanding mortgage balance due within past 7 years.
HasPropertyForeclosed	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	Description Indicates whether borrower had property foreclosed upon in last 7 years.
`HasUndisclAddlCreditApp`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether, on or before closing, borrower applied for new undisclosed credit like a credit card or installment loan.
`HasUndisclAddlPropApp`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether, on or before closing, borrower applied for an undisclosed mortgage loan on a property other than the application property.
`IsCoSignerUndisclDebt`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether borrower is co-signer or guarantor on debt or loan that's not disclosed on loan application.
`IsPartyToLawsuit`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether borrower is party to lawsuit with potential personal financial liability.
`IsPresentlyDelinquent`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether borrower is currently delinquent or in default on any federal debt or other loan, mortgage, financial obligation, bond, or loan guarantee.

Field	Details
IsPrimaryResidence	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether property to be borrower's primary residence.
IsRelatedToSeller	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether borrower has family or business relationship with seller of property (for purchase transaction).
IsSubjectToPriorityLien	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether application property is to have a priority clean energy lien like Property Assessed Clean Energy Program financing that takes priority over the first mortgage lien.
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.
LoanApplicantId	**Type** reference **Properties** Create, Filter, Group, Sort

Field	Details
	Description ID of the borrower making these declarations.
`LoanApplicationId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the loan application associated with these declarations.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Name of the loan application declaration.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the user who owns this record.
`PriorPropertyTitleType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Identifies how borrower held title in the ownership interest property. Possible values are: • `Joint With Other Than Spouse` • `Joint With Spouse` • `Yourself`
`PriorPropertyUsageType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Identifies type of property borrower held ownership interest in.

Field	Details
	Possible values are: • `Investment Property` • `Primary Residence` • `Second Home` • `Secondary Residence`

Associated Objects

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

LoanApplicantDeclarationFeed
Feed tracking is available for the object.

LoanApplicantDeclarationHistory
History is available for tracked fields of the object.

LoanApplicantDeclarationOwnerSharingRule
Sharing rules are available for the object.

LoanApplicantDeclarationShare
Sharing is available for the object.

LoanApplicantEmployment

Represents details about the borrower's or co-borrower's current and past employment. This object is available in API version 47.0 and later.

Supported Calls

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

Fields

Field	Details
`CurrentJobAdditionalMonthCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Additional number of months employed at this job (less than 12).

Field	Details
`CurrentJobYearCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Number of full years employed at this job.
`EmployerAddress`	**Type** address **Properties** Filter, Nillable **Description** Address of borrower's employer or business.
`EmployerCity`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The address city.
`EmployerCountry`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The address country.
`EmployerGeocodeAccuracy`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The level of accuracy of a location’s geographical coordinates compared with its physical address. A geocoding service typically provides this value based on the address’s latitude and longitude coordinates.
`EmployerLatitude`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description Used with Longitude to specify the precise geolocation of the address. Acceptable values are numbers between –90 and 90 with up to 15 decimal places.
EmployerLongitude	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Used with Latitude to specify the precise geolocation of the address. Acceptable values are numbers between –180 and 180 with up to 15 decimal places.
EmployerName	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Name of borrower's employer or business.
EmployerPhone	**Type** phone **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Employer's phone number.
EmployerPostalCode	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The address postal code.
EmployerState	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The address state.
EmployerStreet	**Type** textarea

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The address street.
EmploymentExtIdentifier	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies imported data in an external data source (if applicable). This field is unique within your organization.
EndDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Borrower's last date of employment at this job.
IsLessThanQuarterShare	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether borrower owns less than 25 percent of this business (if applicable).
IsRelToTransactionParty	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether borrower is employed by a family member, propery seller, real estate agent, or other person party to the loan application transaction.
IsSelfEmployed	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether borrower is self-employed or owns the business.

Field	Details
JobTitle	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The borrowers job title or employer's business or industry type.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
LoanApplicantId	**Type** reference **Properties** Create, Filter, Group, Sort **Description** ID of the borrower associated with employment details.
LoanApplicationId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the loan application associated with this borrower's employment information.
MonthlyBaseIncomeAmount	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description Borrower's base monthly income from this job.
MonthlyBonusAmount	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Borrower's monthly bonus from this job.
MonthlyCommissionAmount	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Borrower's monthly commission from this job.
MonthlyIncome	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Borrower's monthly income or loss from this business.
MonthlyMilitaryEntlAmt	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Borrower's monthly military entitlement from this job.
MonthlyOtherIncomeAmount	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Borrower's other monthly income from this job.
MonthlyOvertimeAmount	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description Borrower's monthly overtime income from this job.
`MonthlyTotalIncomeAmount`	**Type** currency **Properties** Filter, Nillable, Sort **Description** Borrower's total monthly income from this job. **Formula** `MonthlyBaseIncomeAmount + MonthlyOvertimeAmount + MonthlyBonusAmount + MonthlyCommissionAmount + MonthlyMilitaryEntlAmt + MonthlyOtherIncomeAmount`
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Name of the loan applicant employment.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the user who owns this record.
`StartDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date borrower started working at this job.

Associated Objects

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

LoanApplicantEmploymentFeed
Feed tracking is available for the object.

LoanApplicantEmploymentHistory
History is available for tracked fields of the object.

LoanApplicantEmploymentOwnerSharingRule
Sharing rules are available for the object.

LoanApplicantEmploymentShare
Sharing is available for the object.

LoanApplicantIncome

Represents details about the borrower and co-borrower current monthly income. This object is available in API version 47.0 and later.

Supported Calls

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

Fields

Field	Details
`IncomeExtIdentifier`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies imported data in an external data source (if applicable). This field is unique within your organization.
`IncomeSourceType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Source of borrower's monthly non-employment income. Possible values are: • `Alimony` • `Automobile Allowance` • `Boarder Income` • `Capital Gains` • `Child Support` • `Disability` • `Foster Care`

Field	Details
	• Housing or Parsonage • Interest and Dividends • Mortgage Credit Certificate • Mortgage Differential Payments • Notes Receivable • Other • Public Assistance • Retirement • Royalty Payments • Separate Maintenance • Social Security • Trust • Unemployment Benefits • VA Compensation
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.
LoanApplicantId	**Type** reference **Properties** Create, Filter, Group, Sort **Description** ID of the borrower associated with this income.
LoanApplicationId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description ID of the loan application associated with this income or expense.
`MonthlyIncomeAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Amount of the borrower's monthly non-employment income from this source.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Name of the other monthly income.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the user who owns this record.

Associated Objects

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

LoanApplicantIncomeFeed
Feed tracking is available for the object.

LoanApplicantIncomeHistory
History is available for tracked fields of the object.

LoanApplicantIncomeOwnerSharingRule
Sharing rules are available for the object.

LoanApplicantIncomeShare
Sharing is available for the object.

LoanApplicantLiability

Represents a junction between a borrower and a loan application liability. This object is available in API version 47.0 and later.

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Supported Calls

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

Fields

Field	Details
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`LoanApplicantId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** ID of the borrower associated with the liability.
`LoanApplicationLiabilityId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** ID of the loan application associated with the liability.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** An auto-generated number assigned to this record.

Field	Details
`Role`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Sort, Update **Description** Identifies borrower's ownership role for the liability. Possible values are: • `Co-Holder` • `Primary` The default value is Co-Holder.

Associated Objects

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

LoanApplicantLiabilityHistory
History is available for tracked fields of the object.

LoanApplicationAsset

Represents details about the borrower's and co-borrower's current personal and real property. This object is available in API version 47.0 and later.

Supported Calls

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

Fields

Field	Details
`AccountNumber`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Account number associated with financial institution holding asset.
`AccountType`	**Type** picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** Identifies asset account type. Possible values are: • `Bonds` • `Bridge Loan Proceeds` • `Cash Value of Life Insurance` • `Certificate of Deposit` • `Checking` • `Individual Development Account` • `Money Market` • `Mutual Fund` • `Retirement` • `Stock Options` • `Stocks` • `Trust Account`
`AssetClass`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Identifies which asset class total to include the asset's value in. Possible values are: • `Financial` • `Other` • `Real Estate`
`AssetExtIdentifier`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies imported data in an external data source (if applicable). This field is unique within your organization.
`AssetType`	**Type** picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** Identifies type of other asset. Possible values are: • `Earnest Money` • `Employer Assistance` • `Other` • `Proceeds from Real Estate Property to be sold on or before closing` • `Proceeds from Sale of Non-Real Estate Asset` • `Rent Credit` • `Secured Borrowed Funds` • `Sweat Equity` • `Trade Equity` • `Unsecured Borrowed Funds`
`CashOrMarketValue`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Asset's cash or current market value.
`DispositionType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Real estate asset's planned future use. Possible values are: • `Pending Sale` • `Retained` • `Sold`
`FinancialInstitutionName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Name of financial institution where financial account is held.
GrossMonthlyRentalIncome	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Borrower's monthly rent income collected on real estate asset.
IsJointAsset	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates asset is held jointly.
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.
LoanApplicationId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the loan application associated with this asset.
Name	**Type** string

Field	Details
	Properties Create, Filter, Group, idLookup, Sort, Update **Description** Name of the loan application asset.
NetMonthlyRentalIncome	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Borrower's net monthly income on real estate asset.
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the user who owns this record.
PresentMarketValue	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Cash value of real estate asset if sold today.
RealEstateAddress	**Type** address **Properties** Filter, Nillable **Description** Real estate asset's address.
RealEstateCity	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The address city.
RealEstateCountry	**Type** string

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The address country.
RealEstateGeocodeAccuracy	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The level of accuracy of a location's geographical coordinates compared with its physical address. A geocoding service typically provides this value based on the address's latitude and longitude coordinates.
RealEstateLatitude	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Used with Longitude to specify the precise geolocation of the address. Acceptable values are numbers between –90 and 90 with up to 15 decimal places.
RealEstateLongitude	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Used with Latitude to specify the precise geolocation of the address. Acceptable values are numbers between –180 and 180 with up to 15 decimal places.
RealEstateMonthlyExpense	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Borrower's monthly real estate asset expenses including insurance, maintenance, taxes, and miscellaneous costs.
RealEstatePostalCode	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The address postal code.
`RealEstateState`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The address state.
`RealEstateStreet`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The address street.

Associated Objects

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

LoanApplicationAssetFeed
Feed tracking is available for the object.

LoanApplicationAssetHistory
History is available for tracked fields of the object.

LoanApplicationAssetOwnerSharingRule
Sharing rules are available for the object.

LoanApplicationAssetShare
Sharing is available for the object.

LoanApplicationFinancial

Represents transaction details for a loan application. This object is available in API version 47.0 and later.

Supported Calls

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

Fields

Field	Details
BorrowerClosingCostAmt	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Total closing costs due from borrower, including prepaid and initial escrow payments.
CashFromOrToBorrowerAmt	**Type** currency **Properties** Filter, Nillable, Sort **Description** Cash the borrower pays or receives at closing, not including reserves or other funds that may still require lender verification. **Formula** `PurchasePriceAmount + RemodelAndRepairsAmount + LandAcquiredSeparatelyAmount + OutstandingLoanAmount + TotalDebtPaidOffAmount + BorrowerClosingCostAmt + DiscountPointCostAmount - LoanExclFinMortInsAmt - FinancedMortgageInsAmt - CreditFromSeller - OtherCredit`
CounselingAgencyName	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Counseling provider's name if agency isn't HUD approved or if Housing Counseling Agency ID is unknown
CounselingAgencyProvName	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Education provider's name if agency isn't HUD-approved or if Housing Counseling Agency ID is unknown.
CounselingComplBorrName	**Type** string

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** Name of borrower or borrowers who completed housing counseling.
`CounselingCompletionDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** Date borrower completed housing counseling.
`CreditFromSeller`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Total amount of closing costs due from seller.
`DiscountPointCostAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Total cost of discount points purchased by the borrower due at closing.
`EdCompletedBorrowerName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Name of borrower or borrowers who completed homeownership education.
`EstFirstMortgagePmtAmt`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Proposed monthly first mortgage payment for loan application property, including principal and interest.

Field	Details
EstHomeownersInsPmtAmt	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Proposed monthly payment for homeowners insurance on application property.
EstMortgageInsPmtAmt	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Proposed monthly mortgage insurance payment on application property.
EstOtherDuesPaymentAmt	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Proposed total monthly payment on application property for payments like homeowners association, co-op, condo, or planned unit development dues.
EstOtherPaymentAmt	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Proposed total monthly payment for other housing expenses on application property.
EstPropertyTaxesPmtAmt	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Proposed monthly payment for real estate taxes on application property.
EstSubordinateLienPmtAmt	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description Proposed total monthly payment for other mortgages or liens on loan application property, including principal and interest.
`EstSuppPropertyInsPmtAmt`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Proposed monthly payment for supplemental property insurance like flood, earthquake, or umbrella policies on application property.
`FinancedMortgageInsAmt`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Total amount of financed mortgage insurance or financed mortgage insurance equivalent.
`FinancialExtIdentifier`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies imported data in an external data source (if applicable). This field is unique within your organization.
`HasCompletedCounseling`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether one or more borrowers completed housing counseling within the last 12 months.
`HasHoEducation`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether one or more borrowers completed homeownership education within the last 12 months.

Field	Details
HoEducationCompletedDate	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** Date borrower completed homeownership education.
HoEducationFormat	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Indicates the format of homeownership education attended by borrower. Possible values are: • `Attended Workshop in Person` • `Completed Web-Based Workshop`
HousingCounselingFormat	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Indicates the format of the housing counseling completed by borrower. Possible values are: • `Face-to-Face` • `Internet` • `Telephone`
HudApprAgencyIdentifier	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Home counseling provider's Housing Counseling Agency ID if agency is HUD-approved.
HudApprovedProvIdentifier	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Homeownership education provider's Housing Counseling Agency ID if agency is HUD-approved.
LandAcquiredSeparatelyAmount	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Price of land if purchased separately from the building or structure.
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.
LoanAmount	**Type** currency **Properties** Filter, Nillable, Sort **Description** Total amount of loan including financed mortgage insurance or mortgage insurance equivalent. **Formula** `LoanExclFinMortInsAmt + FinancedMortgageInsAmt`
LoanApplicationId	**Type** reference **Properties** Create, Filter, Group, Sort

Field	Details
	Description ID of the loan application associated with this loan transaction.
`LoanExclFinMortInsAmt`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Loan amount excluding financed mortgage insurance or financed mortgage insurance equivalent.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Name of the loan application financial.
`OtherCredit`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Total amount of all purchase credits like borrower credits, credits from third parties, and non-cash seller credits.
`OtherNewMortgageLoanAmt`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Total amount of other new borrower mortgages, both first lien and subordinate lien, on the application property.
`OutstandingLoanAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Total amount of all mortgage loans on application property to be paid off by refinance loan.

Field	Details
PurchasePriceAmount	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Purchase price for the property.
RemodelAndRepairsAmount	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Cost of any alterations, improvements, and repairs on the property.
TotalCashDueFromBorrower	**Type** currency **Properties** Filter, Nillable, Sort **Description** Total cash due from borrower at closing. **Formula** `PurchasePriceAmount + RemodelAndRepairsAmount + LandAcquiredSeparatelyAmount + OutstandingLoanAmount + TotalDebtPaidOffAmount + BorrowerClosingCostAmt + DiscountPointCostAmount`
TotalCredit	**Type** currency **Properties** Filter, Nillable, Sort **Description** Total borrower credits. **Formula** `CreditFromSeller + OtherCredit`
TotalDebtPaidOffAmount	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description Total amount of all non-application property liabilities borrower indicated would be paid off on or before closing.
`TotalEstPaymentAmt`	**Type** currency **Properties** Filter, Nillable, Sort **Description** Proposed total monthly payment for application property. **Formula** `EstFirstMortgagePmtAmt + EstSubordinateLienPmtAmt + EstHomeownersInsPmtAmt + EstSuppPropertyInsPmtAmt + EstPropertyTaxesPmtAmt + EstMortgageInsPmtAmt + EstOtherDuesPaymentAmt + EstOtherPaymentAmt`
`TotalMortgageLoanAndCreditAmt`	**Type** currency **Properties** Filter, Nillable, Sort **Description** Total mortgage loans plus total credits. **Formula** `LoanExclFinMortInsAmt + FinancedMortgageInsAmt + CreditFromSeller + OtherCredit`
`TotalMortgageLoansAmount`	**Type** currency **Properties** Filter, Nillable, Sort **Description** Total amount of loan. **Formula** `LoanExclFinMortInsAmt + FinancedMortgageInsAmt`

Associated Objects

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

LoanApplicationFinancialFeed
Feed tracking is available for the object.

LoanApplicationFinancialHistory
History is available for tracked fields of the object.

LoanApplicationLiability

Represents details about the borrower and co-borrower current liabilities. This object is available in API version 47.0 and later.

Supported Calls

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

Fields

Field	Details
`AccountNumber`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Borrower's account number with lender or creditor.
`AccountType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Personal debt borrower owes like credit card balances, other debts, and leases. Possible values are: • `Installment` • `Lease` • `Open 30-Day` • `Other` • `Revolving`
`CreditLimitAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Credit limit of real estate loan or line of credit.

Field	Details
`CreditorName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Lender or creditor owed the debt.
`IsJointLiability`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description**
`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.
`LiabilityClass`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Include the liability's monthly payment in this liability class monthly payment total. Possible values are: • `Financial` • `Other` • `Real Estate`
`LiabilityExtIdentifier`	**Type** string

Field	Details
	Properties Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies imported data in an external data source (if applicable). This field is unique within your organization.
`LoanApplicationAssetId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the loan application real estate asset associated with a real estate liability.
`LoanApplicationId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the loan application associated with this liability.
`LoanType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Existing real estate loan type. Possible values are: • `Conventional` • `Federal Housing Authority` • `Other` • `USDA or Rural Housing Service` • `Veterans Affairs`
`MonthlyPaymentAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Borrower's monthly payment required to keep debt account current.

Field	Details
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Name of the loan application liability.
`OtherLiabilityType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Identifies type of other borrower expense or liability. Possible values are: • `Alimony` • `Child Support` • `Job Related Expenses` • `Other` • `Separate Maintenance`
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the user who owns this record.
`ShouldBePaidInFull`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether borrower to pay off debt on or before closing.
`UnpaidBalanceAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Unpaid liability balance when borrower completed loan application.

Associated Objects

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

LoanApplicationLiabilityFeed
Feed tracking is available for the object.

LoanApplicationLiabilityHistory
History is available for tracked fields of the object.

LoanApplicationLiabilityOwnerSharingRule
Sharing rules are available for the object.

LoanApplicationLiabilityShare
Sharing is available for the object.

LoanApplicationProperty

Represents details of the property the loan application finances. This object is available in API version 47.0 and later.

Supported Calls

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

Fields

Field	Details
`ExpMonthlyRentalIncome`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Estimated gross monthly rental income per unit if application property is a two to four unit primary residence or investment property.
`ExpNetMonthlyRentalInc`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Estimated net monthly rental income per unit if application property is a two-to-four unit primary residence or investment property.
`IsManufacturedHome`	**Type** boolean

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether application property is a manufactured home.
`IsMixedUseProperty`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether application property includes commercial space set aside for business use.
`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.
`LoanApplicationId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** Loan application associated with this property.
`LoanPurposeType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** What the borrower will use the loan for.

Field	Details
	Possible values are: • `Other` • `Purchase` • `Refinance`
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Name of the loan application property.
`PropertyAddress`	**Type** address **Properties** Filter, Nillable **Description** Physical address of the property to be financed.
`PropertyCity`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The address city.
`PropertyCountry`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The address country.
`PropertyExtIdentifier`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies imported data in an external data source (if applicable). This field is unique within your organization.

Field	Details
PropertyGeocodeAccuracy	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The level of accuracy of a location's geographical coordinates compared with its physical address. A geocoding service typically provides this value based on the address's latitude and longitude coordinates.
PropertyLatitude	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Used with Longitude to specify the precise geolocation of the address. Acceptable values are numbers between –90 and 90 with up to 15 decimal places.
PropertyLongitude	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Used with Latitude to specify the precise geolocation of the address. Acceptable values are numbers between –180 and 180 with up to 15 decimal places.
PropertyPostalCode	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The address postal code.
PropertyState	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The address state.
PropertyStreet	**Type** textarea

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The address street.
`PropertyUseType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Borrower's stated use for the property. Possible values are: • `FHA Secondary Residence` • `Investment Property` • `Primary Residence` • `Secondary Residence`
`PropertyValue`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Estimated present market value of the application property.
`RequestedLoanAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Total loan amount the borrower is applying for.
`UnitsFinancedCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Number of units being financed at this address.

Associated Objects

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

LoanApplicationPropertyFeed
Feed tracking is available for the object.

LoanApplicationPropertyHistory
History is available for tracked fields of the object.

LoanApplicationTitleHolder

Represents details of borrowers who are applying to hold title to the property the loan application finances. This object is available in API version 47.0 and later.

Supported Calls

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

Fields

Field	Details
`IsCurrentTitleHolder`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether person is a current title holder on property to be refinanced.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.

Field	Details
`LoanApplicationId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** Loan application associated with this title holder.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Name of the loan application title holder.
`TitleHolderExtIdentifier`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies imported data in an external data source (if applicable). This field is unique within your organization.
`TitleHolderName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Name of the person on the title for the property associated with the loan application.

Associated Objects

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

LoanApplicationTitleHolderFeed
Feed tracking is available for the object.

LoanApplicationTitleHolderHistory
History is available for tracked fields of the object.

MultipartyInfoAuthRequest

Tracks a request for multiple parties of authorization on a Data Use Purpose. For example, consent requests to share the required documents to open a joint financial account or share mortgage disclosures to loan applicants (borrower + co-borrower). 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()`

Fields

Field	Details
`AuthorizationType`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The number of parties needed for consent- all parties must accept / majority parties need to consent or at least one party must consent. Possible values are: • `All` • `Any` • `HalfOrMajority`—Half or Majority • `Majority` The default value is 'All'.
`DataUsePurposeId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** Reference to the purpose of this request. This is a relationship field. **Relationship Name** DataUsePurpose **Relationship Type** Lookup **Refers To** DataUsePurpose

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

Field	Details
	Description The consentees' aggregate response to this request, based on the authorization type. Possible values are: • `New` • `Rejected` • `Seen` • `Signed` The default value is 'New'.
`SourceRecordId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The record from which this consent request is created. This is a relationship field. **Relationship Name** SourceRecord **Relationship Type** Lookup **Refers To** Account, BusinessMilestone, Campaign, Case, Claim, ClaimItem, Contact, Contract, DocumentChecklistItem, FinServ__AccountAccountRelation__c, FinServ__Alert__c, FinServ__AssetsAndLiabilities__c, FinServ__B2CLeadCompanyNameConfig__c, FinServ__BillingStatement__c, FinServ__Card__c, FinServ__ChargesAndFees__c, FinServ__ContactContactRelation__c, FinServ__Education__c, FinServ__Employment__c, FinServ__FinancialAccountRole__c, FinServ__FinancialAccountTransaction__c, FinServ__FinancialAccount__c, FinServ__FinancialGoal__c, FinServ__FinancialHolding__c, FinServ__IdentificationDocument__c, FinServ__IndustriesAppConfig__c, FinServ__IndustriesSettings__c, FinServ__LifeEvent__c, FinServ__NextLastInteractionSettings__c, FinServ__PolicyPaymentMethod__c, FinServ__ReciprocalRole__c, FinServ__Record_Rollup_Configuration__c, FinServ__Revenue__c, FinServ__RollupByLookupConfig__c, FinServ__RollupByLookupFilterCriteria__c, FinServ__Securities__c, FinServ__UsePersonAccount__c, FinServ__WealthAppConfig__c, FinServ__individualExcludedFields__c, InsurancePolicyCoverage, Lead, Opportunity, OpportunityLineItem, Order, OrderItem, PersonLifeEvent, Quote, QuoteLineItem, ResidentialLoanApplication, Task

Associated Objects

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

MultipartyInfoAuthRequestChangeEvent on page 1009
Change events are available for the object.

MultipartyInfoAuthRequestFeed on page 1013
Feed tracking is available for the object.

MultipartyInfoAuthRequestHistory on page 1021
History is available for tracked fields of the object.

MultipartyInfoAuthRequestShare on page 1029
Sharing is available for the object.

OpportunityParticipant

Represents information about a participant in the context of an opportunity record. This object is available in API version 50.0 and later.

Supported Calls

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

Fields

Field	Details
`Comments`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Notes about this participant.
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether this participant is active.
`LastReferencedDate`	**Type** dateTime

Field	Details
	Properties Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** An automatically generated name for the participant.
`OpportunityId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The ID of the opportunity related to the participant.
`ParticipantId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The ID of the user or group related to the participant.
`ParticipantRoleId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The ID of the object-based role for this participant.

Associated Objects

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

OpportunityParticipantChangeEvent on page 1009
Change events are available for the object.

OpportunityParticipantFeed on page 1013 (API version 52.0)
Feed tracking is available for the object.

OpportunityParticipantHistory on page 1021 (API version 52.0)
History is available for tracked fields of the object.

PartyBusinessRegion

Represents the trading regions of a party, covering both domestic and international locations, where the business entity is actively involved in trading activities. This object is available in API version 61.0 and later.

Supported Calls

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

Fields

Field	Details
`BusinessRegionName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the name of the region where business activities are conducted.
`BusinessRegionType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the type of geographical region where business activities are conducted.
`EndDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The date when the party stopped the trade activities with the country.
`IsActiveTradeRegion`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether a business entity is currently trading in the region (true) or not (false). The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** A unique number that represents the party business region.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the user who created the record. This field is a polymorphic relationship field.

Field	Details
	Relationship Name Owner **Relationship Type** Lookup **Refers To** Group, User
PartyProfileId	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The party profile associated with the party business region. This field is a relationship field. **Relationship Name** PartyProfile **Relationship Type** Lookup **Refers To** PartyProfile
RecordTypeId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the record type associated with the relationship. This field is a relationship field. **Relationship Name** RecordType **Relationship Type** Lookup **Refers To** RecordType
RegionReferenceObjectId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The country or state where the business activities are conducted.

Field	Details
	This field is a polymorphic relationship field. **Relationship Name** RegionReferenceObject **Relationship Type** Lookup **Refers To** GeoCountry, GeoState
`RegionRevenuePercent`	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** The percentage of the overall revenue contributed by the party trading region.
`StartDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the party started the trade activities with the country.
`TradeType`	**Type** multipicklist **Properties** Create, Filter, Nillable, Update **Description** Specifies the type of financial transfer associated with the party.

PartyCertifiedCapacity

Represents the information captured from the certificate of capacity, such as the party's capacity to work, a timeline for recovery, and return to work. This object is available in API version 56.0 and later.

Supported Calls

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

Fields

Field	Details
`Capacity`	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** The percentage of capacity the party is able to work.
`ClaimId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The Claim associated with the Party Certified Capacity. This field is a relationship field. **Relationship Name** Claim **Relationship Type** Lookup **Refers To** Claim
`CurrencyIsoCode`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** If multiple currencies are enabled, this field contains the currency ISO code associated with the record. Possible values are: • `AED`—UAE Dirham • `CAD`—Canadian Dollar • `GBP`—British Pound • `JPY`—Japanese Yen • `USD`—U.S. Dollar The default value is `USD`.
`EffectiveEndDate`	**Type** date

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The end date of the period the certificate is effective for.
`EffectiveStartDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The start date of the period the certificate is effective for.
`ExpectedWorkReturnDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The expected date the party returns to work.
`FullCapacityFromDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date the party has the full capacity to work.
`IssueDate`	**Type** date **Properties** Create, Filter, Group, Sort, Update **Description** The date the certificate was issued.
`IssuerId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The Issuer of the Party Certified Capacity. This field is a polymorphic relationship field.

Field	Details
	Relationship Name Issuer **Relationship Type** Lookup **Refers To** Account, Contact, HealthcareProvider
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** Create, Filter, Group, idLookup, Sort, Update **Description** Name of the party certified capacity.
NoCapacityEndDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The end date of the certified period in which the party has no capacity to work.
NoCapacityStartDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The start date of the certified period in which the party has no capacity to work.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The Owner associated with the Party Certified Capacity. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`PartialCapacityEndDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The end date of the certified period in which the party has some capacity to work.
`PartialCapacityStartDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The start date of the certified period in which the party has some capacity to work.
`PartyId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The Party associated with the Party Certified Capacity. This field is a polymorphic relationship field. **Relationship Name** Party

Field	Details
	Relationship Type Lookup **Refers To** Account, ClaimParticipant, Contact
`Status`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies the status of the certificate. Possible values are: • `Active` • `Expired` • `Pending Approval` • `Submitted`
`UsageType`	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** Internal field. Specifies the application using the entity to populate data. Possible values are: • `Claim`

Associated Objects

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

PartyCertifiedCapacityChangeEvent on page 1009
Change events are available for the object in API version 63.0 and later.

PartyCertifiedCapacityFeed on page 1013
Feed tracking is available for the object.

PartyCertifiedCapacityHistory on page 1021
History is available for tracked fields of the object.

PartyCertifiedCapacityOwnerSharingRule on page 1026
Sharing rules are available for the object.

PartyCertifiedCapacityShare on page 1029
Sharing is available for the object.

PartyCreditProfile

Represents the credit score details for a party. This object is available in API version 60 and later.

Supported Calls

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

Fields

Field	Details
`CreditBureauName`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the credit bureau providing the credit profile information.
`CreditPrflReportIdentifier`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The identifier of the credit profile report from the credit bureau for a party profile.
`CreditScore`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The credit score of the party profile.
`CreditScoreDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the credit score of the party profile was accessed.
`IsVerified`	**Type** picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** Indicates whether the party credit profile is verified (true) or not (false). Possible values are: • `Verification Unsuccessful` • `Verified`
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the party credit profile record.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the record owner. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup

Field	Details
	Refers To Group, User
`PartyProfileId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The party profile that's associated with the risk assessment. This field is a relationship field. **Relationship Name** PartyProfile **Relationship Type** Lookup **Refers To** PartyProfile
`ReferenceObjectId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** This field is a polymorphic relationship field. **Relationship Name** ReferenceObject **Refers To** Account, Applicant, Contact, PartyProfile
`TotalExposureAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The total amount of outstanding loans of applicant, from all banks.

Associated Objects

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

PartyCreditProfileChangeEvent on page 1009
Change events are available for the object.

PartyCreditProfileFeed on page 1013
Feed tracking is available for the object.

PartyCreditProfileHistory on page 1021
History is available for tracked fields of the object.

PartyCreditProfileOwnerSharingRule on page 1026
Sharing rules are available for the object.

PartyCreditProfileShare on page 1029
Sharing is available for the object.

PartyExpense

Represents the expense incurred by an individual or account. This object is available in API version 61.0 and later.

Supported Calls

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

Fields

Field	Details
`ApplicationFormId`	**Type** reference **Properties** Filter, Group, Nillable, Sort **Description** The ID of the application form. This field is a relationship field. **Relationship Name** ApplicationForm **Refers To** ApplicationForm
`CurrencyIsoCode`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** If multiple currencies are enabled, contains the currency ISO code associated with the record.

Field	Details
	Possible values are: • `USD`—U.S. Dollar The default value is `USD`.
`EndDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The end date and time of the expense.
`ExpensesAsOfDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the party expense is documented.
`IsReadOnly`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the party expense is read only (true) or not (false). The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.

Field	Details
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the expense.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the record owner. This field is a polymorphic relationship field. **Relationship Name** Owner **Refers To** Group, User
`PartyFinancialLiabilityId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The party financial liability that's associated with the party expense. This field is a relationship field. **Relationship Name** PartyFinancialLiability **Refers To** PartyFinancialLiability
`PartyId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The party associated with the expense. This field is a polymorphic relationship field. **Relationship Name** Party

Field	Details
	Refers To Account, Applicant, Contact, PartyProfile
`PartyProfileId`	**Type** reference **Properties** Filter, Group, Nillable, Sort **Description** The ID of the party profile. This field is a relationship field. **Relationship Name** PartyProfile **Refers To** PartyProfile
`RecurrenceInterval`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The interval after which the expense is incurred. Possible values are: • `Bi-Weekly` • `Monthly` • `One Time` • `Weekly` • `Yearly`
`StartDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description**
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The status of the party expense.

Field	Details
	Possible values are: • `Active` • `Inactive`
`TotalAmount`	**Type** currency **Properties** Create, Filter, Sort, Update **Description** The total expense amount.
`Type`	**Type** picklist **Properties** Create, Filter, Group, Sort, Update **Description** The type of expense. Possible values are: • `Child Care` • `Child Support` • `Clothing` • `Debt` • `Entertainment` • `Food & Dining` • `Garnishments` • `Gas` • `Gifts` • `Health and Hospitalization Insurance Premiums` • `Housing` • `Insurance` • `Medical Prescriptions and Expenses` • `Miscellaneous` • `Mobile Device` • `Mortgage` • `Personal Care` • `Reimbursement` • `Representative Payee` • `Shopping` • `Spousal Support`

Field	Details
	• `Subscriptions` • `Transportation` • `Travel` • `Utilities`
`UsageType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The usage type of the party expense. Possible values are: • `CashFlow`—Cash Flow • `Claim` • `VehicleAndAssetLoanOrigination`—Vehicle And Asset Loan Origination
`VerificationDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the party expense information was verified.
`VerificationStatus`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The verification status of the party expense.

PartyFinancialAsset

Represents information about the financial asset owned by an individual or account. This object is available in API version 61.0 and later.

Supported Calls

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

Special Access Rules

This is a standard object and is available only when you turn on the Financial Account Management Standard Objects setting.

Fields

Field	Details
`ApplicantId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The applicant associated with the financial asset. This field is a relationship field. **Relationship Name** Applicant **Relationship Type** Lookup **Refers To** Applicant
`AssetId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The asset owned by the party. This field is a polymorphic relationship field. **Relationship Name** Asset **Relationship Type** Lookup **Refers To** Asset
`CurrencyIsoCode`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** If multiple currencies are enabled, contains the currency ISO code associated with the record. Valid value is `USD`.

Field	Details
	The default value is `USD`.
`DeclarationDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date when the asset is declared.
`Description`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description of the asset.
`IsLienExisting`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicate whether there is a lien on the financial asset. The default value is `false`.
`IsReadOnly`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the party financial asset is read only (`true`) or not (`false`). The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime

Field	Details
	Properties Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record.
`MakeName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The make name of the asset.
`ModelName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The model name of the asset.
`ModelYear`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The model year of the asset.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the party financial asset.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The owner of the party financial asset record. This field is a polymorphic relationship field.

Field	Details
	Relationship Name Owner **Relationship Type** Lookup **Refers To** Group, User
`OwnershipEndDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time when the ownership of the asset ends.
`OwnershipPercent`	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** The share owned by the party in percentage.
`OwnershipStartDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time when the ownership of the asset starts.
`OwnershipType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The ownership type of the asset. Valid values are: • `Individual` • `Joint`
`PartyId`	**Type** reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The party that owns the asset. This field is a polymorphic relationship field. **Relationship Name** Party **Relationship Type** Lookup **Refers To** Account, Applicant, Contact, PartyProfile
`PartyProfileId`	**Type** reference **Properties** Filter, Group, Nillable, Sort **Description** The party profile that owns the financial asset. This field is a relationship field. **Relationship Name** PartyProfile **Refers To** PartyProfile
`PayoffDueAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The payoff due amount of the party financial asset.
`PledgeAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The amount the party pledges as a collateral against a financial asset.
`PurchaseAmount`	**Type** currency

Field	Details
	Properties Create, Filter, Nillable, Sort, Update **Description** The amount the party paid for the financial asset.
`SerialNumber`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The serial number of the financial asset.
`SourceSystemIdentifier`	**Type** external lookup **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** The unique identifier of the party asset in an external system.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The status of the asset. Valid values are: • `Active` • `Inactive`
`Type`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of asset.
`UsageType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update

Field	Details
	Description The usage type of the party financial asset. Valid values are: • `CashFlow`—Cash Flow • `Claim` • `VehicleAndAssetLoanOrigination`—Loan Origination
`ValuationAmount`	**Type** currency **Properties** Create, Filter, Sort, Update **Description** The worth of the asset after valuation.
`VerificationDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the asset valuation was done.
`ValuationDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time when the asset valuation was done.
`VerificationStatus`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The verification status of the party financial asset.

Associated Objects

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

partyfinancialassetFeed on page 1013
Feed tracking is available for the object.

partyfinancialassetHistory on page 1021
History is available for tracked fields of the object.

PartyFinancialAssetLien

Represents information about the lien of the financial asset owned by an individual or account. This object is available in API version 61.0 and later.

Supported Calls

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

Fields

Field	Details
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the lien is active. The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last viewed this record or list view.
`LienAmount`	**Type** currency

Field	Details
	Properties Create, Filter, Nillable, Sort, Update **Description** The amount of the lien.
`LienHolder`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the lien holder.
`MaturityDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The maturity date of the lien.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the party financial asset lien.
`PartyFinancialAssetId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The financial asset associated with the lien. This field is a relationship field. **Relationship Name** PartyFinancialAsset **Relationship Type** Master-detail **Refers To** PartyFinancialAsset (the master object)

Associated Objects

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

PartyFinancialAssetLienChangeEvent on page 1009
Change events are available for the object.

PartyFinancialAssetLienFeed on page 1013
Feed tracking is available for the object.

PartyFinancialAssetLienHistory on page 1021
History is available for tracked fields of the object.

PartyFinancialAssetLienOwnerSharingRule on page 1026
Sharing rules are available for the object.

PartyFinancialAssetLienShare on page 1029
Sharing is available for the object.

PartyFinancialAssetRela

Represents the relationship between financial assets. The object relates one party financial asset to another and is used for grouping assets to be pledged together as collateral. For example, an asset can be a part of multiple groups of assets, which each group being pledged for a distinct loan. This object is available in API version 65.0 and later. Available with Digital Lending permission set.

Supported Calls

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

Fields

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

Field	Details
`PartyFinancialAssetId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The primary financial asset in the relationship. For example, a standalone building that is part of a larger asset group. This field is a relationship field. **Relationship Name** PartyFinancialAsset **Relationship Type** Master-detail **Refers To** PartyFinancialAsset (the master object)
`RelatedPartyFinancialAssetId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The financial asset that the primary financial asset is associated with. For example, an asset group that includes the primary asset. This field is a relationship field. **Relationship Name** RelatedPartyFinancialAsset **Refers To** PartyFinancialAsset
`RelationshipType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the type of relationship between the party financial assets. Possible values are: • `Group` • `SoldTogether`—Sold Together

PartyFinancialAssetTerm

Represents a term or condition associated with a financial asset. Aids in identifying and tracking the terms set by a lender or the legal or regulatory terms around a financial asset's ownership, usage, maintenance, and monitoring. This object is available in API version 65.0 and later. Available with Digital Lending permission set.

Supported Calls

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

Fields

Field	Details
`AdditionalInformation`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The additional details about the term or condition.
`EffectiveEndDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date until when the party financial asset term remains effective.
`EffectiveStartDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date from which the party financial asset term becomes effective.
`IsLegallyEnforceable`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the party financial asset term is enforceable under regulations (true) or not (false).

Field	Details
	The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`PartyFinancialAssetId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The party financial asset asssociated with the party financial asset term. This field is a relationship field. **Relationship Name** PartyFinancialAsset **Relationship Type** Master-detail **Refers To** PartyFinancialAsset (the master object)
`ReferenceRecordId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The reference record associated with the party financial asset term. This field is a polymorphic relationship field. **Relationship Name** ReferenceRecord

Field	Details
	Refers To PartyFinancialAssetLien, PartyFinclAssetAddlOwner
`TermId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The term or condition associated with the party financial asset term. This field is a relationship field. **Relationship Name** Term **Refers To** Term
`Type`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the type of term associated with the party financial asset term. For example, term related to lien repayment, additional ownership, or title related. Possible values are: • `Loan to Value Ratio not to go above 75%` • `Restriction on Sale if Lien Exists`

Associated Objects

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

PartyFinancialAssetTermChangeEvent on page 1009
Change events are available for the object.

PartyFinancialAssetTermFeed on page 1013
Feed tracking is available for the object.

PartyFinancialAssetTermHistory on page 1021
History is available for tracked fields of the object.

PartyFinancialAssetTermOwnerSharingRule on page 1026
Sharing rules are available for the object.

PartyFinancialAssetTermShare on page 1029
Sharing is available for the object.

PartyFinclAssetAddlOwner

Represents information about the additional owner of an asset. This object is available in API version 61.0 and later.

Supported Calls

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

Special Access Rules

This is a standard object and is available only when you turn on the Financial Account Management Standard Objects setting.

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The account associated with the additional owner. This field is a relationship field. **Relationship Name** Account **Relationship Type** Lookup **Refers To** Account
`ApplicantId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The applicant associated with the additional owner of the financial asset. This field is a relationship field. **Relationship Name** Applicant **Relationship Type** Lookup

Field	Details
	Refers To Applicant
`ContactId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The contact associated with the additional owner. This field is a relationship field. **Relationship Name** Contact **Relationship Type** Lookup **Refers To** Contact
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date when a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date when a user viewed this record.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the record.
`OwnershipSharePercent`	**Type** percent

Field	Details
	Properties Create, Filter, Nillable, Sort, Update **Description** The percentage of the asset ownership between the primary and additional owner.
`PartyFinancialAssetId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The asset associated with the additional owner. This field is a relationship field. **Relationship Name** PartyFinancialAsset **Relationship Type** Lookup **Refers To** PartyFinancialAsset
`PartyProfileId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The party profile associated with the additional owner of the financial asset. This field is a relationship field. **Relationship Name** PartyProfile **Relationship Type** Lookup **Refers To** PartyProfile
`SourceSystemIdentifier`	**Type** external lookup **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** The unique identifier of the additional owner of the party asset in an external system.

Associated Objects

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

PartyFinclAssetAddlOwnerChangeEvent on page 1009
Change events are available for the object.

PartyFinclAssetAddlOwnerFeed on page 1013
Feed tracking is available for the object.

PartyFinclAssetAddlOwnerHistory on page 1021
History is available for tracked fields of the object.

PartyFinancialLiability

Represents information about a financial liability held by a party. This object is available in API version 61.0 and later.

Supported Calls

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

Special Access Rules

This is a standard object and is available only when you turn on the Financial Account Management Standard Objects setting.

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Filter, Group, Nillable, Sort **Description** The account associated with the party financial liability. This field is a relationship field. **Relationship Name** Account **Relationship Type** Lookup **Refers To** Account

Field	Details
ApplicantId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The applicant who submitted the application. This field is a relationship field. **Relationship Name** Applicant **Refers To** Applicant
ApplicationFormId	**Type** reference **Properties** Filter, Group, Nillable, Sort **Description** The application that's submitted for a party financial liability. This field is a relationship field. **Relationship Name** ApplicationForm **Refers To** ApplicationForm
ContactId	**Type** reference **Properties** Filter, Group, Nillable, Sort **Description** The contact associated with the party financial liability. This field is a relationship field. **Relationship Name** Contact **Relationship Type** Lookup **Refers To** Contact
CurrencyIsoCode	**Type** picklist

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** If multiple currencies are enabled, contains the currency ISO code associated with the record. Valid value is `USD`. The default value is `USD`.
`DeclarationDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date when the asset is declared.
`Description`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description of the liability.
`EndDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the obligations or responsibilities linked to the liability ends.
`EstimatedMonthlyPayment`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The estimated monthly payment.
`InterestRate`	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** The interest rate of the party financial liability.

Field	Details
`IsLienExisting`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicate whether there is a lien on the financial asset. The default value is `false`.
`IsReadOnly`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the party financial liability is read only. The default value is `false`.
`IsRepaymentActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the party financial liability is being paid. The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date when a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date when a user viewed this record.
`Lender`	**Type** string

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The branch unit that owns the party financial liability.
LiabilityAccountIdentifier	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The unique identifier of the liability account.
MakeName	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The make name of the asset.
ModelName	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The model name of the asset.
ModelYear	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The model year of the asset.
Name	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the record.
OutstandingBalance	**Type** currency

Field	Details
	Properties Create, Filter, Nillable, Sort, Update **Description** The remaining amount of the liability that the party owes.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The owner of this record. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`OwnershipEndDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time when the ownership of the asset ends.
`OwnershipPercent`	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** The share owned by the party in percentage.
`OwnershipStartDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time when the ownership of the asset starts.

Field	Details
`OwnershipType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The ownership type of the asset. Valid values are: • `Individual` • `Joint`
`PartyId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The party, such as account, contact, or party profile associated with the party financial liability. This field is a polymorphic relationship field. **Relationship Name** Party **Relationship Type** Lookup **Refers To** Account, Applicant, Contact, PartyProfile
`PartyProfileId`	**Type** reference **Properties** Filter, Group, Nillable, Sort **Description** Party profile associated with the party financial liability. This field is a relationship field. **Relationship Name** PartyProfile **Refers To** PartyProfile
`PayoffDueAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description The payoff due amount of the party financial asset.
`PledgeAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The amount the party pledges as a collateral against a financial asset.
`PurchaseAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The amount the party paid for the financial asset.
`SerialNumber`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The serial number of the financial asset.
`SharePercent`	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** The percentage of the financial liability held by the party.
`ShareType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The share type of the financial liability. Valid values are: • `Individual` • `Joint`

Field	Details
`SourceSystemIdentifier`	**Type** external lookup **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** The unique identifier of the party financial liability in an external system.
`StartDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date at which the obligations or responsibilities linked to the liability begins.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The status of the financial liability. Valid values are: • `Active` • `Inactive`
`Term`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The remaining term in months of the party financial liability.
`Type`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of financial liability. Possible values are: • `Alimony` • `Auto Loan`

Field	Details
	• `Installment` • `Personal Loan`
`UsageType`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The usage type of the party financial asset. Valid values are: • `CashFlow`—Cash Flow • `Claim` • `LoanOrigination`—Loan Origination
`ValuationAmount`	**Type** currency **Properties** Create, Filter, Sort, Update **Description** The worth of the asset after valuation.
`VerificationDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the asset valuation was done.
`ValuationDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time when the asset valuation was done.
`Value`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The value of the financial liability.

Field	Details
VerficationStatus	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The verification status of the party financial liability.
VerificationDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the party financial liability was verified.

Associated Objects

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

PartyFinancialLiabilityChangeEvent on page 1009
Change events are available for the object.

PartyFinancialLiabilityFeed on page 1013
Feed tracking is available for the object.

PartyFinancialLiabilityHistory on page 1021
History is available for tracked fields of the object.

PartyFinancialLiabilityShare on page 1029
Sharing is available for the object.

PartyFinclLiabAddlBrwr

Represents information about an additional party associated with a financial liability. This object is available in API version 61.0 and later.

Supported Calls

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

Special Access Rules

This is a standard object and is available only when you turn on the Financial Account Management Standard Objects setting.

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The account associated with the financial liability additional party. This field is a relationship field. **Relationship Name** Account **Relationship Type** Lookup **Refers To** Account
`ApplicantId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The applicant associated with the additional borrower of the financial liability. This field is a relationship field. **Relationship Name** Applicant **Relationship Type** Lookup **Refers To** Applicant
`ContactId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The contact associated with the financial liability additional party. This field is a relationship field. **Relationship Name** Contact

Field	Details
	Relationship Type Lookup **Refers To** Contact
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date when a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date when a user viewed this record.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the record.
`PartyFinancialLiabilityId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The financial liability held by the additional party. This field is a relationship field. **Relationship Name** PartyFinancialLiability **Relationship Type** Lookup **Refers To** PartyFinancialLiability

Field	Details
PartyProfileId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The party profile associated with the additional borrower of the financial liability. This field is a relationship field. **Relationship Name** PartyProfile **Relationship Type** Lookup **Refers To** PartyProfile
SharePercent	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** The percentage of the financial liability held by the additional party.
SourceSystemIdentifier	**Type** external lookup **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** The unique identifier of the additional party associated with the financial liability in an external system.

Associated Objects

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

PartyFinclLiabAddlBrwrChangeEvent on page 1009
Change events are available for the object.

PartyFinclLiabAddlBrwrFeed on page 1013
Feed tracking is available for the object.

PartyFinclLiabAddlBrwrHistory on page 1021
History is available for tracked fields of the object.

PartyIncome

Represents the income of an individual or a business entity. This income can be from salaries, commissions, fees, rental properties, and other sources. This object is available in API version 55.0 and later.

Supported Calls

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

Fields

Field	Details
`ApplicationFormId`	**Type** reference **Properties** Filter, Group, Nillable, Sort **Description** The application form that's submitted for a party income. Available with Digital Lending. This field is a relationship field. **Relationship Name** ApplicationForm **Relationship Type** Lookup **Refers To** ApplicationForm
`CalendarYear`	**Type** int **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The calendar year when the income was earned.
`ClaimId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The claim associated with the party income. This field is a relationship field.

Field	Details
	Relationship Name Claim **Relationship Type** Lookup **Refers To** Claim
`CurrencyIsoCode`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** If multiple currencies are enabled, this field contains the currency ISO code associated with the record. Valid values are: • `AED`—UAE Dirham • `CAD`—Canadian Dollar • `GBP`—British Pound • `JPY`—Japanese Yen • `USD`—U.S. Dollar The default value is `USD`.
`EmployerAddress`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The compound form of the employer's address.
`EmployerId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The employer associated with the party income. This field is a relationship field. **Relationship Name** Employer **Relationship Type** Lookup

Field	Details
	Refers To Account
EmployerName	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the employer.
EmployerPhone	**Type** phone **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The phone number of the employer.
EndDate	**Type** dateTime **Properties** Create, Filter, Sort, Update **Description** The date when the party income ends.
IncomeAmount	**Type** currency **Properties** Create, Filter, Sort, Update **Description** The amount of the party income.
IncomeAsOfDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the party income is documented. Available with Digital Lending.
IncomeFrequency	**Type** picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The frequency of the party income. Possible values are: • `Monthly` • `One Time` • `Weekly` • `Yearly`
`IncomeSourceId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The source of the income. Available with Digital Lending. This field is a polymorphic relationship field. **Relationship Name** IncomeSource **Relationship Type** Lookup **Refers To** PartyFinancialAsset, PersonEmployment
`IncomeStatus`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** The status of the party income. Possible values are: • `Active` • `Inactive`
`IncomeType`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update

Field	Details
	Description The type of the income. Valid values are: • `Salary` • `Commission—` • `Fees—` • `Rent—` • `Bonus` • `Dividend` • `Interest Income`
`IsReadOnly`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the party income is read only (`true`) or not (`false`). The default value is `false`.
`JobTitle`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The job title of the party.
`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.

Field	Details
Name	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the party income.
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The owner associated with the party income. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
PartyId	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The party associated with the party income. This field is a polymorphic relationship field. **Relationship Name** Party **Relationship Type** Lookup **Refers To** Account, Applicant, ClaimParticipant, Contact, PartyProfile
PartyProfileId	**Type** reference **Properties** Filter, Group, Nillable, Sort **Description** The party profile associated with an applicant.

Field	Details
	Available with Digital Lending This field is a relationship field. **Relationship Name** PartyProfile **Relationship Type** Lookup **Refers To** PartyProfile
`StartDate`	**Type** dateTime **Properties** Create, Filter, Sort, Update **Description** The date when the party income starts.
`UsageType`	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** Internal field. Specifies the application using the party income to populate data. Possible values are: • `CashFlow`—Cash Flow • `Claim` • `KnowYourCustomer`—Know Your Customer • `VehicleAndAssetLoanOrigination`—Vehicle And Asset Loan Origination
`VerificationDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The timestamp when the verification status is updated.
`VerificationStatus`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The verification status of the party income.

ParticipantRole

Represents details such as the name and associated default access level for a role that a participant can have in the context of a parent record. This object is available in API version 50.0 and later.

Supported Calls

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

Fields

Field	Details
`DefaultAccessLevel`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** The default sharing access granted to the participant role. Valid values are: • `Edit`—Read/Write • `None` • `Read`—Read Only
`DeveloperName`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The unique name of the object in the API.
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the participant role is activated (`true`) or not (`false`).
`Language`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update

Field	Details
	Description The language of the participant role.
`MasterLabel`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name for the participant role.
`NamespacePrefix`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** Namespace prefix associated with this object.
`ParentObject`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** The parent object for the participant role. Valid values are: • `Account` • `InteractionSummary`—Available in API version 51.0 and later. • `Opportunity`

PartyIdentityVerification

Represents information about the identity verification checks done for a party. This object is available in API version 56.0 and later.

Supported Calls

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

Fields

Field	Details
`IsResultOverridden`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the party identity verification result was overridden. The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the party identity verification record.
`OverriddenById`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The record of the user who is responsible for overriding the party identity verification result. This field is a relationship field. **Relationship Name** OverriddenBy

Field	Details
	Relationship Type Lookup **Refers To** User
`OverriddenResult`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the overridden result for a party after the party identity verification is complete. Possible values are: • `Accepted` • `On Hold` • `Rejected`
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the record owner. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`PartyProfileId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The party profile that's associated with the third-party identity verification. This field is a relationship field. **Relationship Name** PartyProfile

Field	Details
	Relationship Type Lookup **Refers To** PartyProfile
`ReportUrl`	**Type** url **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The URL of the report provided by the third-party identity verification agency.
`RequestCompletionDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date when the party identity verification request was completed.
`Result`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the result of the party identity verification. Possible values are: • `Accepted` • `On Hold` • `Rejected`
`ResultOverrideComment`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description about the party identity verification.
`ResultOverrideReason`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Specifies the reason for overriding the party identity verification request. Possible values are: • `In Person Verification` • `Manual Verification`
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the status of the party identity verification request. Possible values are: • `Completed` • `In Progress` • `Initiated`
`ThirdPartyVerfProcIdentifier`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of verification run in the third-party verification system.
`ThirdPartyVerfdentifier`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the identity verification record in the third-party identity verification system.
`ThirdPartyVerificationRunUrl`	**Type** url **Properties** Create, Filter, Nillable, Sort, Update **Description** The third-party URL to view details of the verification run on the party profile.
`VerificationRequestDate`	**Type** dateTime

Field	Details
	Properties Create, Filter, Nillable, Sort, Update **Description** The date when the party identity verification request was submitted.
`VerifiedBy`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the third-party that conducted the identity verification.

Associated Objects

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

PartyIdentityVerificationChangeEvent on page 1009
Change events are available for the object.

PartyIdentityVerificationFeed on page 1013
Feed tracking is available for the object.

PartyIdentityVerificationHistory on page 1021
History is available for tracked fields of the object.

PartyIdentityVerificationOwnerSharingRule on page 1026
Sharing rules are available for the object.

PartyIdentityVerificationShare on page 1029
Sharing is available for the object.

PartyIdentityVerificationStep

Represents information about the identity verification done for a party. This object is available in API version 56.0 and later.

Supported Calls

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

Fields

Field	Details
IdVerificationArtifactId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The artifact submitted for identity verifcation. This field is a relationship field. **Relationship Name** IdVerificationArtifact **Relationship Type** Lookup **Refers To** IdentityDocument
IntegrationProviderExecId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The integration provider execution that's associated with the party identity verification step. This field is a relationship field. **Relationship Name** IntegrationProviderExec **Refers To** IntegrationProviderExecution
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort

Field	Details
	Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the party profile verification step record.
`PartyIdentityVerificationId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The party identity verification record that's associated with the verification step. This field is a relationship field. **Relationship Name** PartyIdentityVerification **Relationship Type** Lookup **Refers To** PartyIdentityVerification
`ReportUrl`	**Type** url **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The URL of the report provided by the third-party identity verification agency.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Sort, Update **Description** Specifies the status of the third-party identity verification. Possible values are: • `Cancelled` • `Completed`

Field	Details
	• `In Progress` • `Initiated`
`Type`	**Type** picklist **Properties** Create, Filter, Group, Sort, Update **Description** Specifies the type of the third-party identity verification. Possible values are: • `Document` • `Facial Biometric` • `Other Biometric`
`VerificationDecision`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the decision taken after the third-party identity verification is completed. Possible values are: • `Accepted` • `Manual Review Required` • `Not Accepted`

Associated Objects

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

PartyIdentityVerificationStepChangeEvent on page 1009
Change events are available for the object.

PartyIdentityVerificationStepFeed on page 1013
Feed tracking is available for the object.

PartyIdentityVerificationStepHistory on page 1021
History is available for tracked fields of the object.

PartyIdentityVerificationStepOwnerSharingRule on page 1026
Sharing rules are available for the object.

PartyIdentityVerificationStepShare on page 1029
Sharing is available for the object.

PartyProfile

Represents information about the profile of a party, such as a contact, account, or lead. This object is available in API version 56.0 and later.

Supported Calls

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

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The account that's associated with the party profile. This field is a relationship field. **Relationship Name** Account **Relationship Type** Lookup **Refers To** Account
`BusLicIssAuthorityName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the business license issuing authority.
`BusinessEntityCtryofInc`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the country where the business entity was formed.

Field	Details
BusinessEntityCtryofRgstr	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the country where the business entity is registered.
BusinessEntityIncDate	**Type** date **Properties** Create, Filter, Group, Sort, Update **Description** The incorporation date of the business entity associated with the party profile.
BusinessEntityIncNumber	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The incorporation number of the business entity associated with the party profile.
BusinessEntityName	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The registered name of the business entity associated with the party profile.
BusinessEntityPreviousNames	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Any previous names of the business entity associated with the party profile.
BusinessEntityRgstrDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The registration date of the business entity associated with the party profile.

Field	Details
`BusinessEntityRgstrNumber`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The registration number of the business entity associated with the party profile.
`BusinessEntityTradeName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The trading name of the business entity associated with the party profile.
`BusinessEntityType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the type of the business entity associated with the party profile. Possible values are: • `Locally Incorporated Company` • `Sole Proprietorship` • `Foreign Company` • `Limited Partnership` • `General Partnership` • `Foundations` • `Trusts`
`ContactId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The contact that's associated with the party profile. This field is a relationship field. **Relationship Name** Contact **Relationship Type** Lookup

Field	Details
	Refers To Contact
CountryOfDomicile	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the country of domicile in the party profile.
CountryofBirth	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the country of birth in the party profile.
CreditScore	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The credit score of the party.
CreditScoreProvider	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the name of the agency that provides the credit score of the party.
CustomerReferenceNumber	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The unique identifier that the bank assigns to the customer associated with the party profile record.
DateOfBirth	**Type** date

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The date of birth of the party.
`EmploymentIndustry`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the employment industry of the party specified in the profile. Possible values are: • `Banking` • `Energy and Utilities` • `Government` • `Healthcare` • `IT` • `Mining` • `Real Estate`
`EmploymentType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the type of employment held by the party. Possible values are: • `Full Time` • `Independent Contractor` • `Part Time` • `Retired` • `Student` • `Temporary` • `Unemployed`
`FirstName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The first name of the party in the profile.
`FullName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The full name of the party profile.
`FundSource`	**Type** multipicklist **Properties** Create, Filter, Nillable, Update **Description** Specifies the source of funds for a party in the profile. Possible values are: • `Business Income` • `Commission` • `Government Benefits` • `Rental Income` • `Salary`
`Gender`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the gender of the party in the profile. Possible values are: • `Decline to Specify` • `Female` • `Male`
`HouseholdAccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The household account that's associated with the party profile.

Field	Details
	This field is a relationship field. **Relationship Name** HouseholdAccount **Relationship Type** Lookup **Refers To** Account
`Industry`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Represents the industry in which a business entity operates.
`IndustryClassificationCode`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The unique code associated with the industry in which a business entity operates.
`IsBusEntyListonStockExch`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Specifies whether the business entity is listed on a stock exchange (true) or not (false). The default value is `false`.
`IsFlaggedCustomer`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The default value is `false`.
`IsNetWorthHigh`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	Description Indicates whether the customer has a high net worth (true) or not (false). The default value is `false`.
`IsOffBoarded`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the party profile was off-boarded (true) or not (false). The default value is `false`.
`IsVerified`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Indicates whether the party profile is verified (true) or not (false).
`LastName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The last name of the party in the profile.
`LastProfileReviewDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date when the party profile was last reviewed.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.

Field	Details
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`LeadId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The lead that's associated with the party profile. This field is a relationship field. **Relationship Name** Lead **Relationship Type** Lookup **Refers To** Lead
`LegalEntityIdentifier`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The unique identifier of the business entity used in all financial transactions.
`MiddleName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The middle name of the party in the profile.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update

Field	Details
	Description The name of the party profile record.
`Nationality`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The nationalities held by the party profile.
`NextProfileReviewDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date of the next party profile review.
`OffBoardingComments`	**Type** textarea **Properties** Create, Filter, Nillable, Sort, Update **Description** The date of the next party profile review.
`OffBoardingReason`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The reason the party profile was off-boarded.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the record owner. This field is a polymorphic relationship field. **Relationship Name** Owner

Field	Details
	Relationship Type Lookup **Refers To** Group, User
`Prefix`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The prefix used by the party.
`PrimaryEmail`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The primary email address of the party that's specified in the profile.
`PrimaryIdentificationName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the primary identification document specified in the profile.
`PrimaryIdentifier`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The unique identifier for the party.
`PrimaryIdentifierType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the type of primary identification document defined in the profile. Possible values are: • `Birth Certificate`

Field	Details
	• `Driving License` • `Government ID` • `Passport`
`PrimaryPhone`	**Type** phone **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The primary phone number of the party that's specified in the profile.
`RelatedPartyProfileId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The party profile record associated with this record. This field is a relationship field. **Relationship Name** RelatedPartyProfile **Relationship Type** Lookup **Refers To** PartyProfile
`ResidentType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the type of party residency in the profile.
`ReviewDecision`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the decision taken after the party profile review is complete. Possible values are: • `Accepted` • `On Hold`

Field	Details
	• `Rejected`
`Stage`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The current stage of the party profile. Possible values are: • `Initiated` • `Risk Screening` • `Document Validation` • `Risk Assessment` • `Approval` • `Approved` • `Rejected` • `On Hold`
`StockExchangeName`	**Type** multipicklist **Properties** Create, Filter, Nillable, Update **Description** Specifies the name of the stock exchange where the business entity is listed. Possible values are: • `New York Stock Exchange` • `NASDAQ` • `London Stock Exchange` • `Tokyo Stock Exchange`
`Suffix`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The suffix used by the party.
`SurnameAtBirth`	**Type** string

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The party surname at birth specified in the profile.
`TaxpayerIdentificationNumber`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The taxpayer identifier that's used for tax purposes.
`TaxpayerIdentificationType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of taxpayer identification used for tax purposes. Possible values are: • `SSN` • `Taxpayer Identification Number`
`Type`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the type of the party profile associated with the applicant. Possible values are: • `Business` • `Individual`
`RetirementFundAccountNumber`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The retirement fund account number of the party profile

Associated Objects

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

PartyProfileChangeEvent on page 1009
Change events are available for the object.

PartyProfileFeed on page 1013
Feed tracking is available for the object.

PartyProfileHistory on page 1021
History is available for tracked fields of the object.

PartyProfileOwnerSharingRule on page 1026
Sharing rules are available for the object.

PartyProfileShare on page 1029
Sharing is available for the object.

PartyProfileAddress

Represents information about the address of the party. This object is available in API version 56.0 and later.

Supported Calls

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

Fields

Field	Details
`Address`	**Type** address **Properties** Filter, Nillable **Description** The full address.
`AddressType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the type of party address. Possible values are: • `Billing`

Field	Details
	• `Shipping` • `Temporary`
`City`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The city detail for the address. For example, this field is known as MailingCity on Contact.
`Country`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The country detail for the address. For example, this field is known as MailingCountry on Contact.
`GeocodeAccuracy`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The level of accuracy of a location's geographical coordinates compared with its physical address. A geocoding service typically provides this value based on the address's latitude and longitude coordinates. Possible values are: • `Address` • `Block` • `City` • `County` • `ExtendedZip` • `NearAddress` • `Neighborhood` • `State` • `Street` • `Unknown` • `Zip`
`IsPrimaryAddress`	**Type** boolean

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the party's address is the primary address. The default value is `false`.
`IsCurrentAddress`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the party profile address is the current address (true) or not (false). The default value is `false`.
`IsNegativeAddress`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The default value is `false`.
`IsPermanentAddress`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the address of the party profile is a permanent address (true) or not (false). The default value is `false`.
`IsVerified`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The status of the party profile address verification. Possible values are: • `In Progress` • `Not Verified` • `Verification Unsuccessful` • `Verified`

Field	Details
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
Latitude	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Used with Longitude to specify the precise geolocation of the address. For example, this field is known as MailingLatitude on Contact.
Longitude	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Used with Latitude to specify the precise geolocation of the address. For example, this field is known as MailingLongitude on Contact.
Name	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the party profile address record.
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	Description The ID of the record owner. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`PartyProfileId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The party profile that's associated with the address. This field is a relationship field. **Relationship Name** PartyProfile **Relationship Type** Lookup **Refers To** PartyProfile
`PostalCode`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The postal code for the address. For example, this field is known as MailingPostalCode on Contact.
`State`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The state detail for the address. For example, this field is known as MailingState on Contact.
`Street`	**Type** textarea

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The street detail for the address. For example, this field is known as MailingStreet on Contact.
`ValidityEndDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the party profile address becomes valid.
`ValidityStartDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date until when the party profile address is valid.
`VerificationDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the party profile address was verified.

Associated Objects

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

PartyProfileAddressChangeEvent on page 1009
Change events are available for the object.

PartyProfileAddressFeed on page 1013
Feed tracking is available for the object.

PartyProfileAddressHistory on page 1021
History is available for tracked fields of the object.

PartyProfileAddressOwnerSharingRule on page 1026
Sharing rules are available for the object.

PartyProfileAddressShare on page 1029
Sharing is available for the object.

PartyProfileParticipant

Represents information about the profile participant of a party. This object is available in API version 61.0 and later.

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

Supported Calls

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

Fields

Field	Details
`Comments`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The additional information about the participant.
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the party profile participant is active (`true`) or not (`false`). The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Timestamp for when the current user last viewed this record.

Field	Details
Name	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the party profile participant record.
ParticipantId	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The participant associated with the party profile. This field is a polymorphic relationship field. **Relationship Name** Participant **Relationship Type** Lookup **Refers To** Group, User
ParticipantRoleId	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The default access level for a role that a participant can have in the context of a parent record. This field is a relationship field. **Relationship Name** ParticipantRole **Relationship Type** Lookup **Refers To** ParticipantRole
PartyProfileId	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The party profile associated with the participant.

Field	Details
	This field is a relationship field. **Relationship Name** PartyProfile **Relationship Type** Master-detail **Refers To** PartyProfile (the master object)

Associated Objects

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

PartyProfileParticipantChangeEvent on page 1009
Change events are available for the object.

PartyProfileParticipantFeed on page 1013
Feed tracking is available for the object.

PartyProfileParticipantHistory on page 1021
History is available for tracked fields of the object.

PartyProfileRisk

Represents information about the risk assessment done for a party. This object is available in API version 56.0 and later.

Supported Calls

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

Fields

Field	Details
`ApplicantId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The applicant associated with the party profile risk. This field is a relationship field.

Field	Details
	Relationship Name Applicant **Refers To** Applicant
`IsRiskOverridden`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the risk assessment result of the party was overridden. The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the party profile risk record.
`OverridenRiskCategory`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the risk category that's overridden for a party after the assessment is complete.

Field	Details
	Possible values are: • `High` • `Low` • `Medium`
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the record owner. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`PartyProfileId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The party profile that's associated with the risk assessment. This field is a relationship field. **Relationship Name** PartyProfile **Relationship Type** Lookup **Refers To** PartyProfile
`RiskCategory`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the risk category that's assigned to a party profile after the assessment is complete. Possible values are:

Field	Details
	• `High` • `Low` • `Medium`
`RiskOverriddenById`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The user who overrode the risk assessment result of the party. This field is a relationship field. **Relationship Name** RiskOverriddenBy **Relationship Type** Lookup **Refers To** User
`RiskOverrideReason`	**Type** textarea **Properties** Create, Filter, Nillable, Sort, Update **Description** The reason for overriding the risk assessment result.
`Type`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the type of risk assessment. Possible values are: • `Final` • `Initial`

Associated Objects

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

PartyProfileRiskChangeEvent on page 1009
Change events are available for the object.

PartyProfileRiskFeed on page 1013
Feed tracking is available for the object.

PartyProfileRiskHistory on page 1021
History is available for tracked fields of the object.

PartyProfileRiskOwnerSharingRule on page 1026
Sharing rules are available for the object.

PartyProfileRiskShare on page 1029
Sharing is available for the object.

PartyScreeningStep

Represents information about the screening process conducted for a party. This object is available in API version 56.0 and later.

Supported Calls

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

Fields

Field	Details
`DisclaimerText`	**Type** textarea **Properties** Create, Filter, Nillable, Sort, Update **Description** The disclaimer text received for the party profile screening.
`IntegrationProviderExecId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The integration provider execution that's associated with the party screening step. This field is a relationship field. **Relationship Name** IntegrationProviderExec **Refers To** IntegrationProviderExecution

Field	Details
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`MatchedFieldList`	**Type** multipicklist **Properties** Create, Filter, Nillable, Update **Description** Specifies the fields that matched during the party profile screening. Possible values are: • `Address` • `First Name` • `ID` • `Last Name`
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the party screening step record.
`ResponseCodeComment`	**Type** textarea **Properties** Create, Filter, Nillable, Sort, Update **Description** The description of the response code.

Field	Details
`ResultCode`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The code received after the party profile screening is completed.
`ScreeningSummaryId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The party screening summary record associated with this screening step. This field is a relationship field. **Relationship Name** ScreeningSummary **Relationship Type** Lookup **Refers To** PartyScreeningSummary
`Status`	**Type** picklist **Properties** Create, Filter, Group, Sort, Update **Description** Specifies the status of the third-party party profile screening. Possible values are: • `Cancelled` • `Completed` • `In Progress` • `Initiated`
`Type`	**Type** picklist **Properties** Create, Filter, Group, Sort, Update **Description** Specifies the type of the third-party party profile screening. Possible values are:

Field	Details
	• Adverse Media • Global Sanctions • OFAC • PEP

Associated Objects

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

PartyScreeningStepChangeEvent on page 1009
Change events are available for the object.

PartyScreeningStepFeed on page 1013
Feed tracking is available for the object.

PartyScreeningStepHistory on page 1021
History is available for tracked fields of the object.

PartyScreeningStepOwnerSharingRule on page 1026
Sharing rules are available for the object.

PartyScreeningStepShare on page 1029
Sharing is available for the object.

PartyScreeningSummary

Represents information about the individual screening done for a party. This object is available in API version 56.0 and later.

Supported Calls

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

Fields

Field	Details
`ApplicantId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The applicant that's associated with the party screening summary. This field is a relationship field.

Field	Details
	Relationship Name Applicant **Refers To** Applicant
`IsResultOverridden`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the party profile screening result was overridden. The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the party screening summary record.
`OverriddenById`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The user who is responsible for overriding the party profile screening result.

Field	Details
	This field is a relationship field. **Relationship Name** OverriddenBy **Relationship Type** Lookup **Refers To** User
`OverriddenScreeningDecision`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the overridden result for a party after the screening is complete. Possible values are: • `Clear` • `On Hold` • `Rejected`
`OverrideDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time when the party profile screening was overridden.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the record owner. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User

Field	Details
PartyProfileId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The party profile that's associated with the third-party profile screening. This field is a relationship field. **Relationship Name** PartyProfile **Relationship Type** Lookup **Refers To** PartyProfile
ReportUrl	**Type** url **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The URL of the report provided by the third-party profile screening agency.
RequestCompletionDate	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date when the party profile screening request was completed.
ResultOverrideComment	**Type** textarea **Properties** Create, Filter, Nillable, Sort, Update **Description** The description about the party profile screening.
ResultOverrideReason	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the reason for overriding the party profile screening request.

Field	Details
	Possible values are: • `Manual Verification`
`ScreenedBy`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the third-party that conducted the profile screening.
`ScreeningDecision`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the result of the party profile screening. Possible values are: • `Clear` • `On Hold` • `Rejected`
`ScreeningRequestDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date when the screening request for the party profile was submitted.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the status of the party profile screening request. Possible values are: • `Completed` • `In Progress` • `Initiated`

Field	Details
ThirdPartyScreeningResult	**Type** textarea **Properties** Create, Nillable, Update **Description** The raw JSON or XML payload from the third-party screening system.
ThirdPartySreeningIdentifier	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the profile screening record in the third-party profile screening system.

Associated Objects

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

PartyScreeningSummaryChangeEvent on page 1009
Change events are available for the object.

PartyScreeningSummaryFeed on page 1013
Feed tracking is available for the object.

PartyScreeningSummaryHistory on page 1021
History is available for tracked fields of the object.

PartyScreeningSummaryOwnerSharingRule on page 1026
Sharing rules are available for the object.

PartyScreeningSummaryShare on page 1029
Sharing is available for the object.

PaymentMandate

Represents information about the payment mandates given by a customer to their bank or financial institution to authorize a third party to collect payments from their account. This object is available in API version 61.0 and later.

Supported Calls

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

Special Access Rules

This is a standard object and is available only when you turn on the Financial Account Management Standard Objects setting.

Fields

Field	Details
`AuthorizationType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of authorization associated with the mandate. For example, whether the authorization is for the payment or disbursement requested in the mandate.
`BankAccountNumber`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The account number of the bank that's used for the payment or disbursement.
`BankAccountType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of bank account.
`BankBranchAddress`	**Type** address **Properties** Filter, Nillable **Description** The address of the bank's branch that's selected for repayment.
`BankBranchName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the bank that's selected for repayment.

Field	Details
`BankName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the bank that's selected for repayment.
`BankRoutingNumber`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The sort code or routing number of the bank that's used for payment or disbursement.
`CurrencyIsoCode`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** If multiple currencies are enabled, contains the currency ISO code associated with the record. Valid value is `USD`. The default value is `USD`.
`DisbursementAddress`	**Type** address **Properties** Filter, Nillable **Description** The address where the disbursement check is sent.
`DisbursementCity`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The city related to the disbursement address.
`DisbursementCountry`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The country related to the disbursement address.
DisbursementGeocodeAccuracy	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The level of accuracy of a location's geographical coordinates compared with its physical address. A geocoding service typically provides this value based on the milestone location's latitude and longitude coordinates. Valid values are: • Address • Block • City • County • ExtendedZip • NearAddress • Neighborhood • State • Street • Unknown • Zip
DisbursementLatitude	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The latitude related to the disbursement address.
DisbursementLongitude	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The longitude related to the disbursement address.
DisbursementPostalCode	**Type** string

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The postal code related to the disbursement address.
`DisbursementState`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The state related to the disbursement address.
`DisbursementStreet`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The street related to the disbursement address.
`FinancialAccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The financial account associated with the payment mandate. This field is a relationship field. **Relationship Name** FinancialAccount **Relationship Type** Lookup **Refers To** FinancialAccount
`IsAccountValidated`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the account is validated (`true`) or not (`false`). The default value is `false`.

Field	Details
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the mandate is active (`true`) or not (`false`). The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record.
`MandateAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The amount of the payment or disbursement requested in the mandate.
`MandateEffectiveDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The start date of the mandate.
`MandateEndDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The end date of the mandate.
MandateExternalIdentifier	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The external registration identifier of the mandate.
MandateFrequency	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The payment frequency for the mandate.
MandateInternalIdentifier	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The unique ID of the mandate.
MandateStatus	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The status of the mandate.
MandateSubmissionDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the mandate was submitted.
MandateType	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The type of mandate.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the payment mandate.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The owner of the payment mandate record. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`PersonAccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The person account that's associated with the mandate. This field is a relationship field. **Relationship Name** PersonAccount **Relationship Type** Lookup **Refers To** Account
`Ratio`	**Type** percent

Field	Details
	Properties Create, Filter, Nillable, Sort, Update **Description** The disbursement or payment percentage across bank accounts.

Associated Objects

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

paymentmandateChangeEvent on page 1009
Change events are available for the object.

paymentmandateFeed on page 1013
Feed tracking is available for the object.

paymentmandateHistory on page 1021
History is available for tracked fields of the object.

paymentmandateShare on page 1029
Sharing is available for the object.

PaymentRequest

Represents a financial compensation request for goods or services provided by a third party. 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()`

Special Access Rules

This object is available if the add-on license for Claims Management is enabled.

Fields

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

Field	Details
	Description The claim associated with the payment request. This is a relationship field. **Relationship Name** Claim **Relationship Type** Lookup **Refers To** Claim
`DueDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The due date of the payment request.
`EndDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The end date of services represented in the payment request.
`FacilityId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The facility associated with the payment request. This is a polymorphic relationship field. **Relationship Name** Facility **Relationship Type** Lookup **Refers To** Account, Location
`InsurancePolicyId`	**Type** reference

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

Field	Details
	Relationship Name Owner **Relationship Type** Lookup **Refers To** Group, User
`ReceivedDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date on which the recipient received the payment request.
`ReceivedMethod`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The method in which the payment request was received. Possible values include: • `Electronic Submission` • `Paper Mail`
`ReferenceNumber`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** External unique identifier from the submitting party, such as an invoice number.
`RemittanceAccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The account that receives the remittance payment for the services. This is a polymorphic relationship field. **Relationship Name** RemittanceAccount

Field	Details
	Relationship Type Lookup **Refers To** Account, InsurancePolicyParticipant
`ServiceProviderId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The service provider associated with the payment request. This is a polymorphic relationship field. **Relationship Name** ServiceProvider **Relationship Type** Lookup **Refers To** Account, Contact
`ServiceRecipientId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The account that receives the services in the payment request. This is a polymorphic relationship field. **Relationship Name** ServiceRecipient **Relationship Type** Lookup **Refers To** Account, Contact, InsurancePolicyParticipant
`StartDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The start date of services represented in the payment request.

Field	Details
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Status of the payment request. Possible values include: • `Paid` • `Received`
`SubmissionType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Type of payment request submission, such as an invoice from a service provider. Possible values include: • `Invoice` • `Online Submission`
`SubmittedDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date on which the service provider submitted the payment request.
`SubmittingAccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The billing account that submits the payment to the service recipient. This is a relationship field. **Relationship Name** SubmittingAccount **Relationship Type** Lookup **Refers To** Account

Field	Details
TotalAdjustmentAmount	**Type** currency **Properties** Filter, Nillable, Sort **Description** Total amount that is adjusted, such as the collection of a copay onsite. This is a calculated field.
TotalRequestedAmount	**Type** currency **Properties** Filter, Nillable, Sort **Description** Total amount requested for reimbursement. This is a calculated field.
TotalServiceAmount	**Type** currency **Properties** Filter, Nillable, Sort **Description** Total amount of the services, such as the total services billed. This is a calculated field.

Usage

Use this object to process inbound requests for payments, such as an inbound invoice submitted to an insurance carrier.

Associated Objects

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

PaymentRequestChangeEvent on page 1009
Change events are available for the object in API version 63.0 and later.

PaymentRequestFeed on page 1013
Feed tracking is available for the object.

PaymentRequestHistory on page 1021
History is available for tracked fields of the object.

PaymentRequestOwnerSharingRule on page 1026
Sharing rules are available for the object.

PaymentRequestShare on page 1029
Sharing is available for the object.

PaymentRequestLine

Represents the line item details of the financial compensation request. 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()`

Special Access Rules

This object is available if the add-on license for Claims Management is enabled.

Fields

Field	Details
`AdjustmentAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Adjustment amount for reasons such as copay, deductible, and coinsurance.
`AdjustmentReason`	**Type** multipicklist **Properties** Create, Filter, Nillable, Update **Description** The reason for adjustment. Possible values include: • `Coinsurance` • `Copay` • `Deductible`
`BenefitName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The name of benefit associated with the payment request line, such as Physical Therapy or Ambulance Transportation.
`ClaimItemId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The claim item associated with the payment request line. This is a relationship field. **Relationship Name** ClaimItem **Relationship Type** Lookup **Refers To** ClaimItem
`DiagnosticCodeId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The diagnostic code associated with the payment request line. This is a polymorphic relationship field. **Relationship Name** DiagnosticCode **Relationship Type** Lookup **Refers To** CodeSet, CodeSetBundle
`EndDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The end date of services represented in the payment request line.
`FacilityId`	**Type** reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The facility associated with the payment request line. This is a polymorphic relationship field. **Relationship Name** Facility **Relationship Type** Lookup **Refers To** Account, Location
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the Payment Request Line.
`PaymentRequestId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The payment request associated with the payment request line. This is a relationship field.

Field	Details
	Relationship Name PaymentRequest **Relationship Type** Lookup **Refers To** PaymentRequest
`Quantity`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Number of units the payment request line represents, such as number of days in hospital.
`QuantityUnitOfMeasure`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Unit of measure for the quantity field. Possible values include: • `Days` • `Nights` • `Visits`
`RequestedAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Amount that the requestor is seeking for payment, which is the service amount minus the adjustment amount.
`ServiceAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Total service amount for the payment request line before adjustments.

Field	Details
`ServiceCodeId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The service code associated with the payment request line. This is a polymorphic relationship field. **Relationship Name** ServiceCode **Relationship Type** Lookup **Refers To** CodeSet, CodeSetBundle
`ServiceProviderId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The service provider associated with the payment request line. This is a polymorphic relationship field. **Relationship Name** ServiceProvider **Relationship Type** Lookup **Refers To** Account, Contact
`ServiceType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Type of requested service. Possible values include: • `Device` • `Medication` • `Procedure` • `Repairs`

Field	Details
StartDateTime	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The start date of services represented in the payment request line.
Status	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The status of the payment request line. Possible values include: • Paid • Partially Paid • Received
UnitPrice	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Unit Price for the quantity and quantity unit of measure.

Associated Objects

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

PaymentRequestLineChangeEvent on page 1009
Change events are available for the object in API version 63.0 and later.

PaymentRequestLineFeed on page 1013
Feed tracking is available for the object.

PaymentRequestLineHistory on page 1021
History is available for tracked fields of the object.

PersonEducation

Represents information about professional education for a person in a party role.

Supported Calls

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

Fields

Field	Details
`CompletionDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** Education's completion date.
`ContactId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the person who earned the degree and is listed as a contact.
`EducationLevel`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Level of education achieved. Example values: • Undergraduate degree • Medical school • Internship • Residency • Fellowship
`GraduationDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** Graduation date from institution.

Field	Details
`Identifier`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID issued to the recipient by the educational institution.
`IdentifierIssuer`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Educational institution's name.
`IndividualId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the person who earned the degree and is listed as an individual.
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the record is active.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.

Field	Details
`Name`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** Name of the degree earned.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the user who owns this record.
`StartDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** Education's start date.
`Status`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Sort, Update **Description** Current status of education. Valid values: • Inactive • Revoked • Draft • Verified The default value is Inactive.
`UserId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the person who earned the degree and is listed as a user.

Field	Details
VerificationStatus	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Sort, Update **Description** Current educational status. Valid values: • Authorized • None The default value is None.
VerifiedDate	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** Education was validated on this date.

Associated Objects

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

PersonEducationFeed
Feed tracking is available for the object.

PersonEducationHistory
History is available for tracked fields of the object.

PersonEducationOwnerSharingRule
Sharing rules are available for the object.

PersonEducationShare
Sharing is available for the object.

PersonEmployment

Represents information about a person's employment. This object is available in API version 57.0 and later.

Supported Calls

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

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The Account associated with the Person Employment. This field is a relationship field. **Relationship Name** Account **Relationship Type** Lookup **Refers To** Account
`AnnualIncome`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The annual income of the person.
`EmployerAddress`	**Type** address **Properties** Filter, Nillable **Description** The complete address of the employer.
`EmployerCity`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The city where the employer is located.
`EmployerCountry`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The country where the employer is located.
EmployerGeocodeAccuracy	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The level of accuracy of a location's geographical coordinates compared with its physical address. A geocoding service typically provides this value based on the address's latitude and longitude coordinates. Possible values are: • Address • Block • City • County • ExtendedZip • NearAddress • Neighborhood • State • Street • Unknown • Zip
EmployerLatitude	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Used with Longitude to specify the precise geolocation of the address. Acceptable values are numbers between –90 and 90 with up to 15 decimal places.
EmployerLongitude	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Used with Latitude to specify the precise geolocation of the address. Acceptable values are numbers between –180 and 180 with up to 15 decimal places.

Field	Details
EmployerPhone	**Type** phone **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Employer's phone number.
EmployerPostalCode	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The postal code of the employer's address.
EmployerState	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The state of the employer's address.
EmployerStreet	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The street address of the employer.
EmployerTaxAccountNumber	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The Tax Deduction and Collection Account Number (TAN) of the employer. Available in API version 61.0 and later with Financial Services Cloud.
EmploymentIndustry	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Specifies the employment industry.
`EmploymentSite`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the site of employment. Possible values are: • `Hybrid` • `Onsite`—On-site • `Remote`
`EmploymentStatus`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the employment status with the employer. Possible values are: • `Home Maker` • `Employed` • `Retired` • `Self-Employed` • `Student` • `Unemployed` • `Unemployed with Income` • `Unemployed without Income`
`EmploymentType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the employment type for the party. Possible values are: API version 61.0 and later with Financial Services Cloud: • `Contract`

Field	Details
	• `Full-Time` • `Part-Time` • `Salaried` • `Self-Employed` • `Temporary`
`EndDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The last date of employment at this job.
`HourlyWage`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The hourly wage for the party. Available in API version 61.0 and later with Financial Services Cloud.
`IsCurrentEmployment`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the person employment added is the current employer of the customer. Available in API version 61.0 and later with Financial Services Cloud. The default value is `false`.
`IsFlagged`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the employment-related information requires additional scrutiny. Available in API version 61.0 and later with Financial Services Cloud. The default value is `false`.

Field	Details
`IsLocked`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the record is locked (true) or not (false). The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last accessed this record, a record related to this record, or a list view.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last viewed this record or list view. If this value is null, the user might have only accessed this record or list view (`LastReferencedDate`) but not viewed it.
`MayEdit`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort **Description** Indicates whether the record can be edited (true) or not (false). The default value is `false`.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name for this record.

Field	Details
Occupation	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the person's occupation. Possible values are: • Actor or Entertainer • Architect or Urban Planner • Architecture and Engineering • Artist • Arts, Design, Entertainment, Sports, and Media • Business (Clerical) • Business Executive (Management, Administrator) • Business Owner or Proprietor • Business Salesperson or Buyer • Building and Grounds Cleaning/Maintenance • Clergy (Minister, Priest) • Clergy (Other Religious) • Clinical Psychologist • College Administrator or Staff • College Teacher • Community and Social Service • Computer Programmer or Analyst • Computer and Mathematical • Conservationist or Forester • Construction and Extraction • Dentist (Including Orthodontist) • Dietitian or Nutritionist • Education, Training, and Library • Engineer • Farmer or Rancher • Farming, Fishing, and Forestry • Food Preparation and Serving • Foreign Service Worker (Including Diplomat) • Healthcare Practitioners and Technical • Healthcare Support • Homemaker (Full-Time)

Field	Details
	• Interior Decorator (Including Designer) • Installation, Maintenance, and Repair • Lab Technician or Hygienist • Laborer • Law Enforcement Officer • Lawyer (Attorney) or Judge • Legal • Life, Physical, and Social Science • Management • Military Service (Career) • Musician (Performer, Composer) • Nurse • Office Admin • Optometrist • Other • Personal Care and Service • Pharmacist • Physician • Policymaker or Government • Protective Service • Production • Sales • School Counselor • School Principal or Superintendent • Scientific Researcher • Skilled Trades • Social, Welfare, or Recreation Worker • Teacher or Administrator (Elementary) • Teacher or Administrator (Secondary) • Therapist (Physical, Occupational, Speech) • Transportation and Material Moving • Veterinarian • Writer or Journalist
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	Description The user who owns this record. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`Position`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The last position of the person at this job.
`RelatedPersonId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The person associated with the employment. This field is a polymorphic relationship field. **Relationship Name** RelatedPerson **Relationship Type** Lookup **Refers To** Account, Contact
`StartDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The start date of employment at this job.
`VerificationDate`	**Type** date

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The date when the person employment was verified. Available in API version 61.0 and later with Financial Services Cloud.
`VerificationStatus`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the status of the employment verification done for the party profile. Available in API version 61.0 and later with Financial Services Cloud.
`WeeklyHourCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The number of hours per week that the party works for the employer. Available in API version 61.0 and later with Financial Services Cloud.
`WorkerType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the worker type for the party that's employed. Possible values are: • `Hourly` • `Salaried`

For more information, see PersonEmployment in Public Sector Solutions.

PersonLifeEvent

Represents the life events of an individual, such as marriage, birth of a child, birthday, engagement.

Supported Calls

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

Fields

Field	Details
`EventDate`	**Type** dateTime **Properties** Create, Filter, Sort, Update **Description** The date on which the life event occurred.
`EventDescription`	**Type** textarea **Properties** Create, Nillable, Update **Description** The description of the life event.
`EventLocation`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The location where the life event occurred. This is a compound field of type Address and combines these fields: EventLocationCity, EventLocationCountry, EventLocationGeocodeAccuracy, EventLocationLatitude, EventLocationLongitude, EventLocationPostalCode, EventLocationState, and EventLocationStreet. For more information, see Address Compound Fields.
`EventType`	**Type** picklist **Properties** Create, Filter, Group, Sort **Description** The type of the life event. For example, birth, graduation, job, marriage, relocation, car, home, baby, retirement.
`ExpirationDate`	**Type** dateTime

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

Field	Details
`Name`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The name of the life event.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the record owner.
`PrimaryPersonId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** ID of the person to whom the life event is related. This field cannot be updated using API.
`RelatedPersonId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The person related to the primary person in a life event involving two people, such as marriage.
`SourceSystem`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the source system this record was obtained from.
`SourceSystemIdentifier`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The ID of this record in the source system.

Associated Objects

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

PersonLifeEventChangeEvent on page 1009
Change events are available for the object.

PersonLifeEventFeed
Feed tracking is available for the object.

PersonLifeEventHistory
History is available for tracked fields of the object.

PersonLifeEventOwnerSharingRule
Sharing rules are available for the object.

PersonLifeEventShare
Sharing is available for the object.

ProdtAttrMappedScope

Represents a junction between the product attribute scope and the product classification attribute. This object is available in API version 65.0 and later.

Supported Calls

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

Fields

Field	Details
`AssocProdtAttrId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The product classification attribute or product attribute definition that's associated with the product attribute mapped scope.
`IsSubcoverage`	**Type** boolean

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the product attribute is associated with the subcoverage level. The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`ParentMappedScopeId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The product attribute mapped scope that's associated with the product attribute to define the parent child relationship.
`ProdtAttrScopeId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The product attribute scope that's associated with the product attribute.
`BenefitName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Benefit name that's associated with the product attribute mapped scope as a subcoverage.

Associated Objects

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

ProdtAttrMappedScopeHistory on page 1021
History is available for tracked fields of the object.

ProdtAttrMappedScopeShare on page 1029
Sharing is available for the object.

ProdtAttrScope

Represents the scope definition for a product attribute so that it can be used during claims processing. 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
`ApplicableActions`	**Type** multipicklist **Properties** Create, Filter, Nillable, Restricted picklist, Update **Description** Specifies the action type that initiates the attribute processing. Possible values are: • `Calculate Adjustment` • `Payment Attempted` • `Reserve Adjustment`
`Category`	**Type** picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the processing category of the associated attribute. Possible values are: • `Coinsurance` • `Copay` • `Deductible` • `Limit—Currency` • `Limit—Unit Count` • `Out-of-Pocket Max`
`DurationType`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the duration type over which the attribute consumption is actively monitored during claims processing. Possible values are: • `Calendar Year` • `Lifetime` • `Policy Term` • `Rolling Time Period` The default value is `Policy Term`.
`DurationUnit`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the unit of measure for the duration value. Possible values are: • `Days` • `Months` • `Weeks` • `Years` The default value is `Days`.

Field	Details
`DurationValue`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The duration when the duration type is set to Rolling Time Period.
`ItemType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the item type for the attribute processing. Possible values are: • `Any` • `Injury` • `Property`
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Name of the product attribute scope record.

Field	Details
`Scope`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the scope for tracking the associated attribute. Possible values are: • `Claim` • `Claim Coverage` • `Policy` • `Policy Coverage`
`UsageType`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the usage of the associated attribute.

Associated Objects

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

ProdtAttrScopeHistory on page 1021
History is available for tracked fields of the object.

ProdtAttrScopeShare on page 1029
Sharing is available for the object.

Producer

Represents an agent or an agency selling insurance.

Supported Calls

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

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the agency's business account.
`ContactId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the contact associated with the producer if the producer is an external agent.
`InternalUserId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** If the producer is an internal employee, this field contains the employee's user ID.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Create, Filter, Group, Sort, Update

Field	Details
	Description A unique identifier for the agent or the agency.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the record owner.
`Type`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Indicates whether the producer is an agent or an agency. If the producer reference has agency information, this field value is Agent. Otherwise, it can be an independent agent or agency.

Associated Objects

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

ProducerChangeEvent **on page 1009**
Change events are available for the object in API version 62.0 and later.

ProducerFeed
Feed tracking is available for the object.

ProducerHistory
History is available for tracked fields of the object.

ProducerOwnerSharingRule
Sharing rules are available for the object.

ProducerShare
Sharing is available for the object.

ProducerCommission

Represents a producer's commission for an insurance policy. The commission can be calculated from the commissionable transactions or can be populated from an external system. This object is available in API version 51.0 and later.

Supported Calls

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

Fields

Field	Details
CommissionAmount	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The calculated commission amount for the insurance policy transaction.
CommissionStatementLineItemId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The Commission Statement Line Item corresponds to the Producer Commission This field is a relationship field. **Relationship Name** CommissionStatementLineItem **Refers To** CommissionStatementLineItem
CommissionableAmount	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The amount on which the commission is applied. This can be a transaction amount or a portion of the premium.
CurrencyIsoCode	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** If multiple currencies are enabled, this field contains the currency ISO code associated with the record. Possible values are: • EUR—Euro • GBP—British Pound • USD—U.S. Dollar

Field	Details
	The default value is `USD`.
`InsurancePolicyAssetId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The insured item for which the commission was calculated.
`InsurancePolicyCoverageId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the policy coverage for which the commission was calculated.
`InsurancePolicyId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The insurance policy for which the commission was calculated.
`InsurancePolicyTransactionId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The transaction for which the commission record was created.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort

Field	Details
	Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the producer commission.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the record owner.
`PaymentDatetime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date on which the commission was paid.
`ProducerAllocationAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The revenue amount to be received by the producer associated with the producer commission of Book of Business type.
`ProducerId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The producer, broker, brokerage, or other user who receives the commission.
`ProducerSplitArngLineItemId`	**Type** reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The Producer Split Arrangement Line Item corresponds to the Producer Commission This field is a relationship field. **Relationship Name** ProducerSplitArngLineItem **Refers To** ProducerSplitArngLineItem
`ProducerSplitAssignmentId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The Producer Split Assignment corresponds to the Producer Commission This field is a relationship field. **Relationship Name** ProducerSplitAssignment **Refers To** ProducerSplitAssignment
`ProducerSplitRoleAssignmentId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Related Producer Split Role Assignment This field is a relationship field. **Relationship Name** ProducerSplitRoleAssignment **Refers To** ProducerSplitRoleAssignment
`SourceSystem`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The system from which the producer commission record was sourced.

Field	Details
`SourceSystemIdentifier`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** The ID of the producer commission record in the source system. This field is unique within your organization.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the status of the commission payment. Possible values are: • `Disputed` • `Paid` • `Pending` • `Reversed`
`Type`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the type of commission paid to a producer, account, or contact for a commissionable transaction. Possible values are: • `Advance` • `Bonus` • `Chargeback` • `Commission` • `Contingent Commission`

Associated Objects

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

ProducerCommissionChangeEvent **on page 1009**
Change events are available for the object in API version 62.0 and later.

ProducerCommissionFeed on page 1013
Feed tracking is available for the object.

ProducerCommissionHistory on page 1021
History is available for tracked fields of the object.

ProducerCommissionOwnerSharingRule on page 1026
Sharing rules are available for the object.

ProducerCommissionShare on page 1029
Sharing is available for the object.

ProducerPolicyAssignment

A junction object that associates the Insurance Policy object with the Producer object. This object represents the producers who are managing the same insurance policy. This object is available in API version 47.0 and later. You see this object only if you have enabled the Let Multiple Producers Work on the Same Policy org pref.

Supported Calls

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

Fields

Field	Details
`InsurancePolicyId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The insurance policy that the producer is managing.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort

Field	Details
	Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`LineOfBusiness`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The producer's line of business. Possible values are: • `Business Liability` • `Commercial Auto` • `Commercial Property`
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** An auto-generated number assigned to this record.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the record owner.
`ProducerId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The ID of one of the producers who are working on the insurance policy.

Associated Objects

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

ProducerPolicyAssignmentChangeEvent on page 1009
Change events are available for the object in API version 62.0 and later.

ProducerPolicyAssignmentFeed
Feed tracking is available for the object.

ProducerPolicyAssignmentHistory
History is available for tracked fields of the object.

ProducerPolicyAssignmentOwnerSharingRule
Sharing rules are available for the object.

ProducerPolicyAssignmentShare
Sharing is available for the object.

ProducerRelationship

Represents the relationship between producer team and associated producers. This object is available in API version 62 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** If multiple currencies are enabled, this field contains the currency ISO code associated with the record. Possible values are: • `EUR`—Euro • `GBP`—British Pound • `USD`—U.S. Dollar The default value is `USD`.
`EffectiveDate`	**Type** date **Properties** Create, Filter, Group, Sort, Update

Field	Details
	Description The date from when the relationship becomes effective.
`EndDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date until when the relationship remains effective.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last viewed this record or list view. If this value is null, and `LastReferenceDate` is not null, the user accessed this record or list view indirectly.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the producer relationship record.
`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.

Field	Details
	Relationship Name Owner **Refers To** Group, User
`ProducerId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The primary producer of the team. This field is a relationship field. **Relationship Name** Producer **Relationship Type** Master-detail **Refers To** Producer (the master object)
`RelatedProducerId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The producer that's associated with the primary producer of the team. This field is a relationship field. **Relationship Name** RelatedProducer **Refers To** Producer
`RelatedProducerRole`	**Type** picklist **Properties** Create, Filter, Group, Sort, Update **Description** Specifies the role of the producer that's associated with the primary producer of the team.
`ShouldReceiveRoundedAmount`	**Type** boolean

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the producer receives a rounded value from the split amount. The default value is `false`.
`SplitAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The amount that the producer gets paid for the split.
`SplitPercent`	**Type** percent **Properties** Create, Filter, Sort, Update **Description** The percentage of split to be earned as commission by each producer in the team.

Associated Objects

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

ProducerRelationshipChangeEvent on page 1009
Change events are available for the object in API version 62.0 and later.

ProducerRelationshipHistory on page 1021
History is available for tracked fields of the object.

ProducerRelationshipOwnerSharingRule on page 1026
Sharing rules are available for the object.

ProducerRelationshipShare on page 1029
Sharing is available for the object.

ProducerSplitArngLineItem

Represents compensation information for a producer associated with service or an item. This object is available in API version 61 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** If multiple currencies are enabled, this field contains the currency ISO code associated with the record. Possible values are: • `EUR`—Euro • `GBP`—British Pound • `USD`—U.S. Dollar The default value is `USD`.
`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

Field	Details
	Description The name of the producer split arrangement line item record.
`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 **Refers To** Group, User
`ProducerId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The producer associated with the line item. This field is a relationship field. **Relationship Name** Producer **Refers To** Producer
`ProducerRelationType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the relationship of producer with the brokerage. Possible values are: • `External` • `Internal`
`ProducerRole`	**Type** picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The role of the producer associated with the line item. Possible values are: • `Primary Producer` • `Secondary Producer` • `Tertiary Producer`
`ProducerSplitArrangementId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The parent producer split arrangement associated with the line item. This field is a relationship field. **Relationship Name** ProducerSplitArrangement **Relationship Type** Master-detail **Refers To** ProducerSplitArrangement (the master object)
`ShouldReceiveRoundedAmount`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the producer receives a rounded value from the split amount. The default value is `false`.
`SplitAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The amount that the producer gets paid for the split.
`SplitPercentage`	**Type** percent

Field	Details
	Properties Create, Filter, Nillable, Sort, Update **Description** The commission percentage associated with the split.
`SplitType`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** The type of split. Possible values are: • `Bonus` • `Book of Business` • `Commission` • `Override` • `Revenue Allocation`
`SseqProducerSplitArngId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The subsequent producer split arrangement associated with the line item. This field is a relationship field. **Relationship Name** SseqProducerSplitArng **Refers To** ProducerSplitArrangement

Associated Objects

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

ProducerSplitArngLineItemChangeEvent on page 1009
Change events are available for the object in API version 62.0 and later.

ProducerSplitArngLineItemHistory on page 1021
History is available for tracked fields of the object.

ProducerSplitArngLineItemOwnerSharingRule on page 1026
Sharing rules are available for the object.

ProducerSplitArngLineItemShare on page 1029
Sharing is available for the object.

ProducerSplitArrangement

Represents a Producer Split Arrangement definition associated with an account, service, or an item. This object is available in API version 61 and later.

Supported Calls

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

Fields

Field	Details
`AssignableEndDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date until which the producer split arrangement can be assigned.
`CurrencyIsoCode`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** If multiple currencies are enabled, this field contains the currency ISO code associated with the record. Possible values are: • `EUR`—Euro • `GBP`—British Pound • `USD`—U.S. Dollar The default value is `USD`.
`EffectiveDate`	**Type** date **Properties** Create, Filter, Group, Sort, Update

Field	Details
	Description The date from which the brokerage split is effective.
`EndDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The end date of the brokerage split.
`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.
`LineOfBusiness`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The line of business associated with the producer split arrangement. Possible values are: • `Employee Benefits` • `Property & Casualty`
`LineOfCoverage`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The line of coverage associated with the producer split arrangement.

Field	Details
Name	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the producer split arrangement record.
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the record owner. This field is a polymorphic relationship field. **Relationship Name** Owner **Refers To** Group, User
SplitArrangementType	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** The type of split arrangement.

Associated Objects

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

ProducerSplitArrangementChangeEvent on page 1009
Change events are available for the object in API version 62.0 and later.

ProducerSplitArrangementHistory on page 1021
History is available for tracked fields of the object.

ProducerSplitArrangementOwnerSharingRule on page 1026
Sharing rules are available for the object.

ProducerSplitArrangementShare on page 1029
Sharing is available for the object.

ProducerSplitAssignment

Represents information about commission split associated with a producer that's used to process commission statement. This object is available in API version 61 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** If multiple currencies are enabled, this field contains the currency ISO code associated with the record. Possible values are: • `EUR`—Euro • `GBP`—British Pound • `USD`—U.S. Dollar The default value is `USD`.
`EffectiveDate`	**Type** date **Properties** Create, Filter, Group, Sort, Update **Description** The date when the producer split assignment becomes effective.
`EndDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The end date of the producer split assignment.
`LastReferencedDate`	**Type** dateTime

Field	Details
	Properties Filter, Nillable, Sort **Description** The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last viewed this record or list view. If this value is null, and `LastReferenceDate` is not null, the user accessed this record or list view indirectly.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the producer split assignment record.
`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 **Refers To** Group, User
`ProducerSplitArrangementId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The brokerage split object that's related to the Brokerage Split Assignment. This field is a relationship field.

Field	Details
	Relationship Name ProducerSplitArrangement **Refers To** ProducerSplitArrangement
`ReferenceRecordId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The reference record to which the producer split arragment is assigned. This field is a polymorphic relationship field. **Relationship Name** ReferenceRecord **Refers To** Account, InsurancePolicy

Associated Objects

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

ProducerSplitAssignmentChangeEvent on page 1009
Change events are available for the object in API version 62.0 and later.

ProducerSplitAssignmentHistory on page 1021
History is available for tracked fields of the object.

ProducerSplitAssignmentOwnerSharingRule on page 1026
Sharing rules are available for the object.

ProducerSplitAssignmentShare on page 1029
Sharing is available for the object.

ProducerSplitRoleAssignment

Represents the revenue generating entities assocaited with an insurance policy and account. This object is available in API version 62 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** If multiple currencies are enabled, this field contains the currency ISO code associated with the record. Possible values are: • `EUR`—Euro • `GBP`—British Pound • `USD`—U.S. Dollar The default value is `USD`.
`EffectiveDate`	**Type** date **Properties** Create, Filter, Group, Sort, Update **Description** The date from when the assignment of the procucer role becomes effective.
`EndDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date until when the assignment of the procucer role remains effective.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort

Field	Details
	Description The timestamp when the current user last viewed this record or list view. If this value is null, and `LastReferenceDate` is not null, the user accessed this record or list view indirectly.
`LineOfBusiness`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The line of business associated with the producer split role assignment. Possible values are: • `Employee Benefits` • `Property & Casualty`
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the producer split role assignment record.
`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 **Refers To** Group, User
`ProducerId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The producer associated with the assigned role. This field is a relationship field.

Field	Details
	Relationship Name Producer **Refers To** Producer
`ProducerRole`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** The role of producer in the assignment. Possible values are: • `Primary Producer` • `Secondary Producer` • `Tertiary Producer`
`ReferenceRecordId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The reference record associated with the assigned producer role. This field is a polymorphic relationship field. **Relationship Name** ReferenceRecord **Refers To** Account, InsurancePolicy

Associated Objects

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

ProducerSplitRoleAssignmentChangeEvent **on page 1009**
Change events are available for the object in API version 62.0 and later.

ProducerSplitRoleAssignmentHistory **on page 1021**
History is available for tracked fields of the object.

ProducerSplitRoleAssignmentOwnerSharingRule **on page 1026**
Sharing rules are available for the object.

ProducerSplitRoleAssignmentShare **on page 1029**
Sharing is available for the object.

ProductCoverage

A junction object that associates the Product object with the CoverageType object. You see this object only if you have enabled the Access Master List of Coverage Types org pref.

Supported Calls

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

Fields

Field	Details
`CoverageTypeId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The ID of the coverage type.
`EffectiveDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date from which the coverage is in effect.
`ExpirationDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date on which the coverage expires.
`IsCovered`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether this coverage is included in the product. The default value is False.

Field	Details
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
Name	**Type** string **Properties** Autonumber, Defaulted on create, Filter, Sort **Description** An auto-generated number assigned to this record.
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the record owner.
ProductId	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The ID of the product that is covered.
SourceSystem	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The name of the source system this record was obtained from.
`SourceSystemIdentifier`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of this record in the source system.

Associated Objects

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

ProductCoverageChangeEvent on page 1009
Change events are available for the object in API version 63.0 and later.

ProductCoverageFeed
Feed tracking is available for the object.

ProductCoverageHistory
History is available for tracked fields of the object.

ProductCoverageOwnerSharingRule
Sharing rules are available for the object.

ProductCoverageShare
Sharing is available for the object.

ProductFee

Represents the base fee associated with a product. This object is available in API version 61.0 and later. Available with Digital Lending permission set.

Supported Calls

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

Fields

Field	Details
`Amount`	**Type** currency

Field	Details
	Properties Create, Filter, Sort, Update **Description** The amount of the fee.
`Frequency`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The frequency of the fee. Valid values are: • `Monthly` • `One Time`
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the product fee.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	Description The owner of the product fee record. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`ProductId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The product associated to the fee. This field is a relationship field. **Relationship Name** Product **Relationship Type** Lookup **Refers To** Product2
`Type`	**Type** picklist **Properties** Create, Filter, Group, Sort, Update **Description** The type of fee. Valid values are: • `Closing Fee` • `Origination Fee`
`ValidEndDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The end date of the fee.

Field	Details
ValidStartDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The start date of the fee.

Associated Objects

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

productfeeChangeEvent on page 1009
Change events are available for the object.

ProductFeeFeed on page 1013
Feed tracking is available for the object.

ProductFeeHistory on page 1021
History is available for tracked fields of the object.

ProductFeeShare on page 1029
Sharing is available for the object.

ProductListRate

Represents the list rate of the product. This object is available in API version 61.0 and later. Available with Digital Lending permission set.

Supported Calls

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

Fields

Field	Details
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.

Field	Details
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record.
ListRate	**Type** percent **Properties** Create, Filter, Sort, Update **Description** The representative list rate of the loan product
Name	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the product list rate.
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The owner of the product list rate record. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
ProductId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The product to which the list rate is associated.

Field	Details
	This field is a relationship field. **Relationship Name** Product **Relationship Type** Lookup **Refers To** Product2
`ValidEndDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The start date of the rate.
`ValidStartDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The end date of the rate.

Associated Objects

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

productlistrateChangeEvent on page 1009
Change events are available for the object.

ProductListRateFeed on page 1013
Feed tracking is available for the object.

ProductListRateHistory on page 1021
History is available for tracked fields of the object.

ProductListRateShare on page 1029
Sharing is available for the object.

ProductSurcharge

Represents an association between a product and a surcharge. This object is available in API version 63.0 and later.

Supported Calls

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

Fields

Field	Details
`EffectiveFromDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the product surcharge becomes active.
`EffectiveToDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the product surcharge becomes inactive.
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the product surcharge is active (true) or not (false). The default value is `false`.
`IsProrationAllowed`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the product surcharge is eligible for proration (true) or not (false). The default value is `false`.
`IsRefundAllowed`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	Description Indicates whether the product surcharge is eligible for a refund (true) or not (false). The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the product surcharge.
`ProductPath`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** A path containing the product IDs that roll up to the parent product.
`ProductRelatedComponentId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The product related component associated with the product surcharge. This field is a relationship field.

Field	Details
	Relationship Name ProductRelatedComponent **Refers To** ProductRelatedComponent
`RuleApiName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The API name of the rule that's used to trigger the surcharge.
`SurchargeId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The surcharge associated with the product surcharge. This field is a relationship field. **Relationship Name** Surcharge **Relationship Type** Master-detail **Refers To** Surcharge (the master object)
`TaxTreatmentId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The tax treatment associated with the product surcharge. This field is a relationship field. **Relationship Name** TaxTreatment **Refers To** TaxTreatment

Associated Objects

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

ProductSurchargeHistory on page 1021
History is available for tracked fields of the object in API version 64.0 and later.

QuoteLineItemGroupClass

Represents the association of a Quote Line Item to GroupClass. Use this entity for large group quoting process when multiple group classes are attributed on a single quote line item. Child object of Quote. This object is available in API version 55.0 and later.

Supported Calls

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

Fields

Field	Details
`GroupClassId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The group class associated with the quote and quote line item. This is a relationship field. **Relationship Name** GroupClass **Relationship Type** Lookup **Refers To** GroupClass
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last accessed this record, a record related to this record, or a list view.

Field	Details
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last viewed this record or list view.
Name	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the quote line item group class.
QuoteLineItemId	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The quote line item associated with the quote line item group class. This is a relationship field. **Relationship Name** QuoteLineItem **Relationship Type** Lookup **Refers To** QuoteLineItem

Associated Objects

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

QuoteLineItemGroupClassChangeEvent on page 1009
Change events are available for the object in API version 62.0 and later.

QuoteLineItemGroupClassFeed on page 1013
Feed tracking is available for the object.

QuoteLineItemGroupClassHistory on page 1021
History is available for tracked fields of the object.

QuoteLineItemRelatedObject

Represents the junction between a Quote Line Item and a related object. The values of the attributes from the related object are referenced by the relevant product attributes on the Quote LIne Item This object is available in API version 63.0 and later.

Supported Calls

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

Fields

Field	Details
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the quote line item related object record.
`QuoteLineItemId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The quote line item associated with the record of the related object. This field is a relationship field.

Field	Details
	Relationship Name QuoteLineItem **Relationship Type** Master-detail **Refers To** QuoteLineItem (the master object)
`RelatedRecordIdentifier`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The identifier of the record that's used to get the details of the quote line item.
`RelatedRecordObjectName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort **Description** The name of the object associated with the related record.
`UsageType`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort **Description** The name of the object associated with the related record. Possible values are: • `ExtendedAttribute`

Associated Objects

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

QuoteLineItemRelatedObjectChangeEvent **on page 1009**
Change events are available for the object.

QuoteLineItemRelatedObjectHistory **on page 1021**
History is available for tracked fields of the object.

RelatedRecordAssocCriteria

Defines criteria for automatically linking records like accounts, leads, opportunities, and cases with the branches that work with them. This object is available in API version 52.0 and later.

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

Supported Calls

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

Special Access Rules

To use this object, you must have the Financial Services Cloud Extension permission set.

Fields

Field	Details
`AssociationHandlerApexClassId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of a custom Apex class that handles the creation of association records for specific association criteria. (Typically in the user interface you see the class name.) This class must: • Apply to an object that the Record Association Builder doesn't directly support • Implement the `fscwmgen.BranchManagement AssociationHandler` interface • Return a list of Branch Unit Related Records • Populate at least the minimum required fields in each Branch Unit Related Record: – BranchUnitId: Represents the current branch unit of the user or contact – BusinessUnitMemberId: The Banker ID of the user or contact – RelatedRecordId: The ID of the custom object to be related This field is a relationship field. **Relationship Name** AssociationHandlerApexClass **Relationship Type** Lookup **Refers To** ApexClass

Field	Details
`AssociationType`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** The association type. Possible values are: • `BranchManagement`
`Description`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** A description of the association criteria.
`DeveloperName`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The developer name of the association criteria.
`EventType`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** The type of reference object event that triggers creation of the association. Possible values are: • `Create` • `Update`
`Language`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Supported languages for the association criteria.

Field	Details
`MasterLabel`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The master label of the association criteria. This internal label doesn't get translated.
`NamespacePrefix`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The namespace prefix of the association criteria.
`PreCondition`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** A formula that, when true, causes a new association to be created.
`ReferenceObject`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** The reference object for the association criteria. Possible values are: • `Account` • `Case` • `Contact` • `InteractionSummary` • `Lead` • `Opportunity` • Custom objects
`SelectedOwnerField`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description A field to use instead of the default Owner ID.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** The status of the association criteria. Possible values are: • `Active` • `Draft` • `Inactive`

Associated Objects

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

RelatedRecordAssocCriteriaChangeEventChangeEvent **on page 1009**
Change events are available for the object.

ResidentialLoanApplication

Represents details about a loan application from the lender. This object is available in API version 47.0 and later.

Supported Calls

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

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the account related to the loan application.

Field	Details
AmortizationTerm	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Duration of the loan in months.
AmortizationType	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Amortization type for the loan. Possible values are: • Adjustable Rate • Fixed Rate • Other
ApplicationExtIdentifier	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies imported data in an external data source (if applicable).
BalloonTermMonths	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Number of months during which the cumulative loan must be repaid.
EstateHoldType	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Lender's lien is on both land and structure (fee simple) or just structure (leasehold). Possible values are: • Fee Simple

Field	Details
	• `Leasehold`
`HasOtherLoanFeature`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether loan has other amortization feature.
`HasPrepaymentPenalty`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether penalty is incurred if borrower pays off loan balance before the loan term expires.
`ImprovementCost`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Construction costs for a construction loan or home improvement costs for a renovation loan.
`InitialBuydownRate`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Initial lesser interest rate for the loan.
`IntOnlyTermMonthCount`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Number of months that loan payments are interest only.
`InterestRate`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description Interest rate for the loan.
`IsBalloon`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether borrower is applying for a balloon payment mortgage.
`IsBorrowerCommPropState`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether at least one borrower lives in a community property state.
`IsConstructionConversion`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether loan proceeds to provide permanent financing replacing interim construction financing.
`IsContractConversion`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether loan proceeds is to pay off balance due on a contract for deed or land contract.
`IsEnergyRelImprovement`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether loan is to finance energy-related improvements.
`IsInterestOnly`	**Type** boolean

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether borrower is applying for an interest-only mortgage.
`IsNegativeAmortization`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether loan allows for negative amortization where shortfalls in interest payments are added to the outstanding loan balance.
`IsPropertyCommPropState`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether property is located in a community property state.
`IsRenovation`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether loan proceeds to finance cost of renovations to the property, and renovation value is included in the property's appraised value.
`IsSingleClosing`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether construction and permanent loans have a single combined closing. Once construction is complete, the loan converts to a traditional mortgage.
`IsSubjectToPriorityLien`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	Description Indicates whether property is currently subject to an energy-related lien that could take priority over the first mortgage lien.
IsTempIntRateBuydown	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether borrower is applying for loan with an initially reduced interest payment in exchange for an up-front cash deposit.
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.
LeaseHoldExpirationDate	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** Date when leasehold expires if land is leased.
LoanPurpose	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** What the borrower will use the loan for. Values are:

Field	Details
	• `Other` • `Purchase` • `Refinance`
`LotAcquiredDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** Date the property or land was purchased.
`LotOriginalCost`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Original property cost (refinance) or original land cost (construction).
`MonthsBeforeFirstAdj`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Number of months before the first rate adjustment for an adjustable rate loan.
`MonthsBetweenAdjustments`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Number of months between subsequent rate adjustments for an adjustable rate loan.
`MortgageLienType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Type of mortgage lien associated with this loan application. Possible values are: • `First Lien` • `Subordinate Lien`

Field	Details
`MortgageProgramType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Type of mortgage program applied for. Values are: • `Conventional` • `FHA` • `Other` • `USDARuralHousingService` • `VA`
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Name of the residential loan application.
`NativeLandTenure`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Property is located on an area reserved by or for an Indian land, village, or tribe to live on and use. Possible values are: • `Alaska Native Corporation Land` • `Fee Simple (On a Reservation)` • `Individual Trust Land (Allotted/Restricted)` • `Tribal Trust Land (Off Reservation)` • `Tribal Trust Land (On a Reservation)`
`OpportunityId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the opportunity associated with the loan application.

Field	Details
`OtherAmortizationType`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Description of other amortization type for government loans.
`OtherLoanFeature`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Description of other loan amortization feature.
`OtherLoanPurpose`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** What the borrower will use the loan for if other was specified.
`OtherMortgageProgramType`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Description of the other mortgage type.
`OtherRefinanceProgType`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Refinance program name if other was specified.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the user who owns this record.

Field	Details
`PrepayPenaltyTermMonth`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Number of months during which borrower incurs a penalty for early payoff of the loan balance.
`ProjectType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the type of project that the property belongs to. Possible values are: • `Condominium` • `Cooperative` • `Planned Unit Development(PUD)` • `Property is not located in a project`
`RefinanceProgramType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The applicable refinance program type based on the investor, guarantor, or lender guidelines. Possible values are: • `Full Documentation` • `Interest Rate Reduction` • `Other` • `Streamlined without Appraisal`
`RefinanceType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Refinance loan type. Possible values are: • `Cash Out`

Field	Details
	• `Limited Cash Out` • `No Cash Out`
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Indicates the current status of the loan application. Possible values are: • `Completed` • `New` • `Pending`
`TitleType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Way the borrower or borrowers take title for the loan. Possible values are: • `Joint Tenancy with Right of Survivorship` • `Life Estate` • `Other` • `Sole Ownership` • `Tenancy by the Entirety` • `Tenancy in Common`
`TotalFinLiabilityMonthlyAmt`	**Type** currency **Properties** Filter, Nillable, Sort **Description** Total monthly amount of borrowers' outstanding financial liabilities payments excluding real estate.
`TotalFinancialAssetAmount`	**Type** currency **Properties** Filter, Nillable, Sort

Field	Details
	Description Total amount of borrowers' financial account assets excluding real estate.
`TotalOtherAssetAmount`	**Type** currency **Properties** Filter, Nillable, Sort **Description** Total amount of borrowers' other assets excluding real estate.
`TotalOtherFinLiabilityMonthlyAmt`	**Type** currency **Properties** Filter, Nillable, Sort **Description** Total monthly amount of borrowers' other monthly liability and expense payments excluding real estate.
`TrustTitleType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Title to be held in a living trust or a land trust. Possible values are: • `Title Will be Held by a Land Trust` • `Title Will be Held by an Inter Vivos (Living) Trust`

Associated Objects

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

ResidentialLoanApplicationFeed
Feed tracking is available for the object.

ResidentialLoanApplicationHistory
History is available for tracked fields of the object.

ResidentialLoanApplicationOwnerSharingRule
Sharing rules are available for the object.

ResidentialLoanApplicationShare
Sharing is available for the object.

RetrievalSummaryDefField

Represents a table that stores the fields to retrieve from the target object of a rollup definition. This object is available in API version 61.0 and later.

Supported Calls

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

Fields

Field	Details
`Field`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** The field to retrieve.
`RetrievalSummaryDefOrObjectId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The related retrieval summary definition or node. This field is a polymorphic relationship field. **Relationship Name** RetrievalSummaryDefOrObject **Relationship Type** Master-detail **Refers To** RetrievalSummaryDefObject, RetrievalSummaryDefinition (the master object)
`SequenceNumber`	**Type** int **Properties** Create, Filter, Group, Sort, Update **Description** The order that the rollup definition shows in the setup UI and API result.

RetrievalSummaryDefinition

Represents a table that stores the header information of a retrieval definition. This object is available in API version 61.0 and later.

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

Supported Calls

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

Fields

Field	Details
`DeveloperName`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The unique name of the object in the API.
`Language`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
`MasterLabel`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The master label of the retrieval summary definition.
`NamespacePrefix`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** Namespace prefix associated with the retrieval summary definition.
`RootObject`	**Type** picklist

Field	Details
	Properties Create, Filter, Group, Restricted picklist, Sort, Update **Description** The root node object.

RetrievalSummaryDefObject

Represents a table that stores the rollup definitions of a retrieval definition. This object is available in API version 61.0 and later.

Supported Calls

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

Fields

Field	Details
`RecordAggregationDefinitionId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The rollup definition that determines the records to retrieve. This field is a relationship field. **Relationship Name** RecordAggregationDefinition **Refers To** RecordAggregationDefinition
`RetrievalSummaryDefinitionId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The ID of the related Retrieval Summary Definition. This field is a relationship field. **Relationship Name** RetrievalSummaryDefinition **Relationship Type** Master-detail

Field	Details
	Refers To RetrievalSummaryDefinition (the master object)
`SequenceNumber`	**Type** int **Properties** Create, Filter, Group, Sort, Update **Description** The order that the rollup definition shows in the setup UI and API result.

SecuritiesHolding

Represents the securities associated with an insurance policy. This object is available in API version 47.0 and later.

Supported Calls

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

Fields

Field	Details
`AssetCategory`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The subcategory of asset type. Possible values are: • `Allocation` • `Alternative` • `Commodities` • `International Equity` • `Municipal Bond` • `Sector Equity` • `Taxable Bond` • `U.S. Equity`

Field	Details
AssetCategoryName	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The market capitalization and investing style. Possible values are: • Large Blend • Large Growth • Large Value • Mid-Cap Blend • Mid-Cap Growth • Mid-Cap Value • Small Blend • Small Growth • Small Value
AssetClass	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The major category of asset type. Possible values are: • Alternative Investments • Cash Equivalents • Equities • Fixed Income
FinancialAccountId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The financial account associated with the securities holding. This field is a relationship field. **Relationship Name** FinancialAccount

Field	Details
	Relationship Type Lookup **Refers To** FinancialAccount
FinancialSecurityId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The financial security associated with the securities holding. This field is a relationship field. **Relationship Name** FinancialSecurity **Relationship Type** Lookup **Refers To** FinancialSecurity
`GainLoss`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Change in the value of this holding since its purchase.
`HouseholdId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The household this holding rolls up to. This field is a relationship field. **Relationship Name** Household **Relationship Type** Lookup **Refers To** Account

Field	Details
InsurancePolicyId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The insurance policy this holding is related to. This field is a relationship field. **Relationship Name** InsurancePolicy **Relationship Type** Lookup **Refers To** InsurancePolicy
InvestmentEndDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** End date of the investment.
InvestmentStartDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Start date of the investment.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
LastUpdated	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The timestamp for when data for this holding was last updated by an external data source.

Field	Details
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`MarketValue`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The current market value of this holding.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the holding.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the record owner.
`PercentChange`	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** The percent change in the value of this holding since its purchase.
`Price`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description Current price per share.
`PrimaryOwnerId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The primary owner of this holding.
`PurchasePrice`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Price per share at the time of purchase.
`Sector`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Group of related or common stocks.
`Shares`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The number of shares held.
`SourceSystem`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the source system this record was obtained from.
`SourceSystemIdentifier`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update

Field	Details
	Description The ID of this record in the source system. This field is unique within your organization.

Associated Objects

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

SecuritiesHoldingChangeEvent on page 1009
Change events are available for the object in API version 62.0 and later.

SecuritiesHoldingFeed
Feed tracking is available for the object.

SecuritiesHoldingHistory
History is available for tracked fields of the object.

SecuritiesHoldingShare
Sharing is available for the object.

StageTransitionEntry

Represents the information about the runtime instance of the object stage transition. This object is available in API version 60.0 and later.

Supported Calls

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

Fields

Field	Details
`FromStageValueId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the value of object state before the transition. This field is a relationship field. **Relationship Name** FromStageValue **Refers To** StageValue

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

Field	Details
	Relationship Name Owner **Refers To** Group, User
`ReferenceRecord`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The record ID of the associated stage transition.
`StageTransitionId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The object state transition associated with the object state transition instance. This field is a relationship field. **Relationship Name** StageTransition **Refers To** StageTransition
`StageTransitionPlanStatus`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The transition plan status. Possible values are: • `Completed` • `InProgress`—In Progress • `New`
`ToStageValueId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the value of object state after the transition.

Field	Details
	This field is a relationship field. **Relationship Name** ToStageValue **Refers To** StageValue

StgTrnsUndwrEvaluation

Represents the underwriting rule evaluation result. This object is available in API version 63.0 and later.

Supported Calls

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

Fields

Field	Details
`EvaluationDateTime`	**Type** dateTime **Properties** Create, Filter, Sort, Update **Description** The date and time at which rules were applied to the target object.
`EvaluationResult`	**Type** textarea **Properties** Create, Nillable, Update **Description** The result of evaluation done on all rules for a transaction.
`IsRuleEvaluationSuccessful`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the stage transition was successful (true) or not (false). The default value is `false`.

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

Field	Details
	Relationship Name ReferenceObject **Refers To** InsurancePolicy, Quote
`ReferenceObjectName`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The name of the object for which the underwriting rule was evaluated.
`ReferenceObjectStatus`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The status of the reference object after the underwriting rule evaluation is completed.
`StageTransition`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The stage transition ID for which the underwriting rule was evaluated.

Associated Objects

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

StgTrnsUndwrEvaluationHistory on page 1021
History is available for tracked fields of the object.

StgTrnsUndwrEvaluationOwnerSharingRule on page 1026
Sharing rules are available for the object.

StgTrnsUndwrEvaluationShare on page 1029
Sharing is available for the object.

Surcharge

Represents the details about a surcharge calculation. This object is available in API version 63.0 and later.

Supported Calls

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

Fields

Field	Details
`Amount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The surcharge as a flat amount.
`CalculationType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The type of calculation or process used to determine the surcharge. Possible values are: • `Amount` • `Expression Set` • `Percentage`
`Description`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description of the surcharge.
`EffectiveFromDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the surcharge becomes active.
`EffectiveToDate`	**Type** date

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The date when the surcharge becomes inactive.
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the surcharge is active (true) or not (false). The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the surcharge.
`ProcedureId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the expression set or integration procedure that's used to calculate the surcharge.

Field	Details
	This field is a relationship field. **Relationship Name** Procedure **Refers To** ExpressionSet
`Rate`	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** The surcharge amount as a percentage.
`SurchargeType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The type of the surcharge. Possible values are: • `Tax`

Associated Objects

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

SurchargeHistory on page 1021
History is available for tracked fields of the object in API version 64.0 and later.

SurchargeOwnerSharingRule on page 1026
Sharing rules are available for the object in API version 64.0 and later.

SurchargeShare on page 1029
Sharing is available for the object in API version 64.0 and later.

SvcCatalogItemAttribute

Represents pre-filled fulfillment flow inputs and user questions to ask to users in the context of a service catalog item version. This object is available in API version 57.0 and later.

Supported Calls

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

Fields

Field	Details
`AttributeType`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Type of the attribute used to determine if it's a pre-filled input or a questions to ask to users. Possible values are: • `Base` • `Extended` The default value is `Extended`.
`DataType`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update **Description** Type of the attribute value used into to render questions and validate data filled by users. Possible values are: • `Attachment` • `Checkbox` • `Currency` • `Date` • `Datetime` • `DisplayText` • `Email` • `IPAddress` • `Integer` • `ListOfBoolean` • `ListOfDouble` • `ListOfInteger` • `ListOfMaps` • `ListOfString` • `Lookup` • `Map` • `MultilineText` • `Number` • `NumericScale`

Field	Details
	• `Percentage` • `Picklist` • `Queue` • `SinglelineText` • `Text` • `URL` The default value is `Text`.
`Description`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Description of the service catalog item attribute.
`DeveloperName`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** Unique name in the scope of a Service Catalog Item Version.
`FieldIdentifier`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The unique identifier of the custom or standard field. Possible values are: • `CaseId` • `CatalogItemDescription` • `CatalogItemName` • `CloneSourceId` • `ClosedDate` • `CreatedById` • `CreatedDate` • `Id` • `IsClosed` • `IsDeleted` • `ItemFlowVersion`

Field	Details
	• ItemFlowVersionLookupId • LastModifiedById • LastModifiedDate • LastReferencedDate • LastViewedDate • Name • OwnerId • SubmitterId • SvcCatalogItemDefinitionId • SystemModstamp • UserRecordAccessId
InputVariable	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** References the input variable in which the attribute value will be forwarded.
InputVariableValue	**Type** textarea **Properties** Create, Nillable, Update **Description** Attribute value defined by the catalog builder.
IsRequired	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates if the service catalog item attribute is required. The default value is `false`.
ItemVersionStatus	**Type** picklist **Properties** Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort **Description** Specifies the status of the service catalog item version for which the attribute is defined.

Field	Details
	Possible values are: • `Active` • `Draft` • `Obsolete` The default value is `Draft`.
`Label`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** A label for the service catalog item attribute.
`ParentAttributeId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The associated record. This field is a relationship field. **Relationship Name** ParentAttribute **Relationship Type** Lookup **Refers To** SvcCatalogItemAttribute
`SortOrder`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Sort order used to display questions in a specific order.
`SvcCatalogItemDefId`	**Type** reference **Properties** Filter, Group, Nillable, Sort **Description** The service catalog item definition for which the attribute is defined. This field is a relationship field.

Field	Details
	Relationship Name SvcCatalogItemDef **Relationship Type** Lookup **Refers To** SvcCatalogItemDef

SvcCatalogItemDependency

Represents a collection of records that indicate the dependencies of a service process. This object is available in API version 57.0 and later.

Supported Calls

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

Fields

Field	Details
`DependencyReferenceId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The object that's associated with the dependency. This field is a polymorphic relationship field. **Relationship Name** DependencyReference **Relationship Type** Lookup **Refers To** ApexClass, IntegrationProviderDef, OmniScriptConfig
`ProcessStepName`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The name of the step in the creation process of the service process definition.

Field	Details
	Valid values are: • `FulfillmentFlow` • `IntegrationDefinition` • `Preprocessor` • `RequestForm` Available in API version 62.0 and later.
`Type`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** The type of dependency. Possible values are: • `FlowDefinition`—Flow Definition • `IntegrationProviderDef`—Integration Provider Definition • `OmniScriptConfig`—Omni Script Configuration • `PreprocessorApexClass`—Preprocessor Apex Class

TagCategory

Group similar interest tags together into tag categories. This object is available in API version 54.0 and later.

Supported Calls

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

Fields

Field	Details
`Description`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** A detailed description of the tag category.

Field	Details
`Icon`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Icon to visually represent your tag category.
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the tag category is still active (`true`) or has been dismissed (`false`). The default value is '`false`'.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Level`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Create a hierarchy of levels of tag categories.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update

Field	Details
	Description The name of the tag category.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the user who created the tag category. This is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`ParentCategoryId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The user, account, or contact associated with the tag category. This is a relationship field. **Relationship Name** ParentCategory **Relationship Type** Lookup **Refers To** TagCategory

Term

Represents a term or condition applied for a loan application or a collateral. This object is available in API version 62.0 and later. Available with Digital Lending permission set.

Supported Calls

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

Fields

Field	Details
`Description`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description for the term offered.
`EffectiveFromDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The effective start date of the term.
`EffectiveToDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The expiration date of the term.
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the term offered is active. The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The date the associated location was last modified.
`LastViewedDate`	**Type** dateTime

Field	Details
	Properties Filter, Nillable, Sort **Description** The date the associated location was last viewed.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Name of the term.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Owner ID of the term. This field is a polymorphic relationship field. **Relationship Name** Owner **Refers To** Group, User
`Subtype`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the subtype of a term offered.
`Type`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies the type of a term offered. Possible values are: • `Additional Details`

TermRelatedObject

Represents the relationship between a term and the object for which the term is defined. This object is available in API version 62.0 and later. Available with Digital Lending permission set.

Supported Calls

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

Fields

Field	Details
`EffectiveFromDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The effective date of the term associated with the related object.
`EffectiveToDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The expiration date of the term associated with the related object.
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the term associated with the related object is active. The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The date the associated location was last modified.

Field	Details
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The date the associated location was last viewed.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** Name of the term related object.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Owner ID of the term related object. This field is a polymorphic relationship field. **Relationship Name** Owner **Refers To** Group, User
`ReferenceObjectId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The reference object for which a term is applicable. For example, a term applicable for a financial product. This field is a polymorphic relationship field. **Relationship Name** ReferenceObject **Refers To** Product2
`TermId`	**Type** reference

Field	Details
	Properties Create, Filter, Group, Sort, Update **Description** The term applicable for the related object. This field is a relationship field. **Relationship Name** Term **Refers To** Term

Associated Objects

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

TermRelatedObjectChangeEvent on page 1009
Change events are available for the object.

TermRelatedObjectFeed on page 1013
Feed tracking is available for the object.

TermRelatedObjectHistory on page 1021
History is available for tracked fields of the object.

TermRelatedObjectOwnerSharingRule on page 1026
Sharing rules are available for the object.

TermRelatedObjectShare on page 1029
Sharing is available for the object.

UnderwritingRule

Represents details of an underwriting rule for a product. This object is available in API version 63.0 and later.

Supported Calls

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

Fields

Field	Details
`ApiName`	**Type** string

Field	Details
	Properties Filter, Group, Nillable, Sort **Description** The API name of the underwriting rule.
`Description`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description about the underwriting rule.
`DynamicRuleDefinition`	**Type** textarea **Properties** Create, Nillable, Update **Description** The scope and conditions specified for the dynamic rule.
`EffectiveFromDateTime`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The date and time from when the underwriting rule became active.
`EffectiveToDateTime`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The date and time after when the underwriting rules became inactive.
`EvaluationFailureTaskGroupId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The group of tasks related to a fulfillment plan that's executed when the rule evaluation fails. This field is a relationship field.

Field	Details
	Relationship Name EvaluationFailureTaskGroup **Refers To** FulfillmentStepDefinitionGroup
EvaluationSuccessTaskGroupId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The group of tasks related to a fulfillment plan that's executed when the rule evaluation is successful. This field is a relationship field. **Relationship Name** EvaluationSuccessTaskGroup **Refers To** FulfillmentStepDefinitionGroup
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
Name	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the underwriting rule.

Field	Details
`ProductPath`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** A path containing the product IDs that roll up to the parent product.
`Sequence`	**Type** int **Properties** Filter, Group, Nillable, Sort **Description** The sequence in which the rule is executed.
`Status`	**Type** picklist **Properties** Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort **Description** Specifies the status of the underwriting rule. Possible values are: • `Active` • `Draft` • `Inactive` The default value is `Draft`.
`UnderwritingRuleGroupId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The underwriting rule group associated with this underwriting rule. This field is a relationship field. **Relationship Name** UnderwritingRuleGroup **Relationship Type** Master-detail **Refers To** UnderwritingRuleGroup (the master object)

Associated Objects

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

UnderwritingRuleHistory on page 1021
History is available for tracked fields of the object.

UnderwritingRuleGroup

Represents the underwriting rule that's associated with a product. This object is available in API version 63.0 and later.

Supported Calls

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

Fields

Field	Details
`EvaluationCriteria`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The criteria used to evaluate the underwriting rule.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string

Field	Details
	Properties Create, Filter, Group, idLookup, Sort, Update **Description** The name of the underwriting rule.
`ObjectName`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The name of the object to which the underwriting rules apply. Possible values are: • `InsurancePolicy` • `Quote`
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** This field is a polymorphic relationship field. **Relationship Name** Owner **Refers To** Group, User
`ProductId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The product associated with the underwriting rule. This field is a relationship field. **Relationship Name** Product **Refers To** Product2
`RuleSetApiName`	**Type** string

Field	Details
	Properties Create, Filter, Group, Sort, Update **Description** The API name of the rule set that's created during the underwriting rule creation.
`StageTransition`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The ID of the stage transition to which the underwriting rules apply.
`StageTransitionName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the stage transition.

Associated Objects

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

UnderwritingRuleGroupHistory on page 1021
History is available for tracked fields of the object.

UnderwritingRuleGroupOwnerSharingRule on page 1026
Sharing rules are available for the object.

UnderwritingRuleGroupShare on page 1029
Sharing is available for the object.

UserFinancialAuthority

Represents the maximum monetary amount a user can authorize for a given financial type and product. This object is available in API version 57.0 and later.

Supported Calls

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

Fields

Field	Details
`Description`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The configuration details for the user financial authority record. This field can't be edited.
`EndDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The end date when the user financial authority is in effect.
`EvaluationMethod`	**Type** picklist **Properties** Create, Filter, Group, Sort **Description** The logic that validates the user financial authority. For example, the Claim Coverage Valuation method validates that a payment on a claim coverage doesn't exceed the maximum amount allowed for the user on that claim coverage product. Possible values are: • `Claim Coverage Valuation`
`FinancialType`	**Type** picklist **Properties** Create, Filter, Group, Sort **Description** The financial type associated with the user financial authority. Possible values are: • `Claim Expense` • `Claim Loss`
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort

Field	Details
	Description The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`MaximumApprovalAmount`	**Type** currency **Properties** Create, Filter, Sort, Update **Description** The maximum monetary amount a user can approve for a financial activity.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** The name of the financial user authority.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The owner associated with the user financial authority. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`ProductId`	**Type** reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort **Description** The product associated with the user financial authority. This field is a relationship field. **Relationship Name** Product **Relationship Type** Lookup **Refers To** Product2
`StartDate`	**Type** date **Properties** Create, Filter, Group, Sort, Update **Description** The start date when the user financial authority is in effect.
`UserId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort **Description** The user associated with the user financial authority. This field is a relationship field. **Relationship Name** User **Relationship Type** Lookup **Refers To** User

Associated Objects

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

UserFinancialAuthorityChangeEvent on page 1009
Change events are available for the object in API version 63.0 and later.

UserFinancialAuthorityHistory on page 1021
History is available for tracked fields of the object.

UserFinancialAuthorityOwnerSharingRule on page 1026
Sharing rules are available for the object.

UserFinancialAuthorityShare on page 1029
Sharing is available for the object.

VendorProject

Represents information about a vendor's proejct for which the loan was applied. This object is available in API version 61.0 and later.

Supported Calls

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

Fields

Field	Details
`ApprovalStatus`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The financial institutes approval status for the vendor project.
`ApproverId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The User associated with the vendor project. The user is from the financial institute that approves the project. This field is a relationship field. **Relationship Name** Approver **Refers To** User
`EndDate`	**Type** date

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

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the user who created the record. This field is a polymorphic relationship field. **Relationship Name** Owner **Refers To** Group, User
`PhoneNumber`	**Type** phone **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The phone number of the project's representative. For example, the phone number of project manager or site lead.
`Price`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The price of the vendor project.
`Stage`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The current stage of this project.
`StartDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The start date of the vendor project.
`VendorId`	**Type** reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The account associated with the vendor project for which the loan was applied. This field is a relationship field. **Relationship Name** Vendor **Refers To** Account
`VendorName`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The name of the vendor.
`VendorProjectContact`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the project representative.

WealthAppConfig

Represents configuration information for Financial Services Cloud functionality.

Supported Calls

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

Fields

Field	Details
`InteractionUpdateFrequency`	**Type** double

Field	Details
	Properties Create, Defaulted on create, Filter,Nillable, Sort, Update **Description** Frequency (in minutes) with which the Last Interaction and Next Interaction dates are automatically updated. Default is 15 min.
`RejectedReferralStatus`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The lead status used to identify rejected referrals.

WorkerCompCoverageClass

Represents the compensation coverage class that a worker belongs to. This object is available in API version 47.0 and later.

Supported Calls

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

Fields

Field	Details
`InsurancePolicyCoverageId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The coverages included in the insurance policy.
`InsurancePolicyId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The insurance policy that covers this compensation coverage class.

Field	Details
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
Name	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the compensation coverage class.
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the record owner.
Premium	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The premium for the insurance policy that covers this compensation coverage class.
TotalExposure	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description The payroll that the employees of this compensation coverage class belong to.
`WorkerClass`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The code that represents the compensation class of the employees. Possible values are: • `1701 Abrasive Wheel Mfg. & Drivers` • `1748 Abrasive Wheel Mfg. & Drivers` • `1860 Abrasive Paper or Cloth Preparation`
`WorkerCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The number of employees in this compensation coverage class.
`WorkerLocationId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The location where the worker is employed.

Associated Objects

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

WorkerCompCoverageClassChangeEvent on page 1009
Change events are available for the object in API version 62.0 and later.

WorkerCompCoverageClassFeed
Feed tracking is available for the object.

WorkerCompCoverageClassHistory
History is available for tracked fields of the object.

WorkerCompCoverageClassOwnerSharingRule
Sharing rules are available for the object.

WorkerCompCoverageClassShare
Sharing is available for the object.

FINANCIAL SERVICES CLOUD MANAGED PACKAGE OBJECTS

FinServ Account Custom Fields

Represents information about an individual that pertains to their dealings with your firm, such as their review frequency or service tier. Custom fields extend the standard Account object for use in Financial Services Cloud.

Fields

Field Name	Details
`AssetCategory__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The subcategory of asset type. Possible values are: • Allocation • Alternative • Commodities • International Equity • Municipal Bond • Sector Equity • Taxable Bond • U.S. Equity
`AssetCategoryName__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The market capitalization and investing style. Possible values are: • Large Growth • Large Value • Large Blend • Small Growth • Small Value • Small Blend • Mid-Cap Growth

Field Name	Details
	• Mid-Cap Value • Mid-Cap Blend
`AssetClass__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The major category of asset type. Possible values are: • Alternative Investments • Cash Equivalents • Equities • Fixed Income
`AUM__c`	**Type** currency **Properties** Filter, Nillable, Sort **Description** Value of this individual's financial accounts that your firm manages. Calculated as the sum of `TotalAUMPrimaryOwner__c` and `TotalAUMJointOwner__c`.
`BankNumber__c`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Identifies a financial institution for electronic purposes.
`BorrowingHistory__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Rating of this individual's borrowing history. Valid values: • Excellent • Moderate • Poor • Limited to No History

Field Name	Details
`IsDisputed__c`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the financial transaction is a disputed transaction.
`BorrowingPriorities__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Primary goal for loan application. Valid values: • Build Equity • Debt Consolidation • Education • Investments • Large Capital Purchases • Property Purchase • Renovations
`BranchCode__c`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Identifies an office or building of a financial institution. Code format is based on the financial institution. Record type for this account. The value is copied from `RecordType.Name` and can't be changed.
`BranchName__c`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Location name for a financial institution office. Record type for this account. The value is copied from `RecordType.Name` and can't be changed.

Field Name	Details
`ClaimsOnHouseholdPolicies__c`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The total number of claims raised for the active policies that the policyholder's primary household owns.
`ClientCategory__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Rates the value of this individual's business with your firm. Label is `Category`. Valid values: • Platinum • Gold • Silver • Bronze • Investments
`CreatedByMe__c`	**Type** integer **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Indicates whether the user contact was converted from this lead.
`CreditRating__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Assessment of creditworthiness. Valid values: • Excellent • Good • Fair • Poor

Field Name	Details
`CreditScore__c`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Numerical rating of borrower's creditworthiness.
`ConversionDateTime__c`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The time and date on which the lead was converted.
`CustomerID__c`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Financial institution's identification number for this individual (80 characters) Record type for this account. The value is copied from `RecordType.Name` and can't be changed.
`CustomerSegment__c`	**Type** multipicklist **Properties** Create, Filter, Nillable, Update **Description** Individual's market segment. Valid values: • Borrower • Long-Term Growth • Mass Affluent • Mass Market • Millennial • Transactional • Wealth Accumulation
`CustomerType__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update

Field Name	Details
	Description Individual's financial category. Valid values: • Borrower • Investor • Relational • Transaction
`DisputeReason__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Reason for the dispute. Valid values are: • Duplicate Transactions • Transaction not recognized • Suspected Fraud • Others
`EventLocation__c`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The location where the life event occurred. This is a compound field of type Address and combines these fields: • EventLocationCity • EventLocationCountry • EventLocationGeocodeAccuracy • EventLocationLatitude • EventLocationLongitude • EventLocationPostalCode • EventLocationState • EventLocationStreet
`FinancialAccount__c`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update

Field Name	Details
	Description Represents the financial account, such as an investment account, bank account, or insurance policy, that is associated with this case.
`FinancialInterests__c`	**Type** multipicklist **Properties** Create, Filter, Nillable, Update **Description** This individual's financial areas of interest. Valid values: • Municipal Bonds • Fixed Income • Energy • Technology • CRM • AAPL • GOOG • Retirement • College Planning
`Household__c`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The household with which this opportunity is associated.
`HouseholdPolicies__c`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The total number of active policies that the policyholder's primary household owns.
`IndividualId__c`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update

Field Name	Details
	Description Read only. Unique ID that relates this individual's account record to its contact record.
`IndividualType__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Type of individual. Valid values: • Individual • Group • (Blank) - If this value is blank, then the Individual Type is Business. Note: This field is for Salesforce internal-use only. This field can't be changed.
`InvestmentExperience__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** This individual's investment experience. Valid values: • Experienced • Moderately Experienced • Moderately Inexperienced • Inexperienced
`InvestmentObjectives__c`	**Type** multipicklist **Properties** Create, Filter, Nillable, Update **Description** This individual's preference for growth versus income investments. Valid values: • Conservative Income • Income • Balanced • Growth • Aggressive Growth

Field Name	Details
KYCDate__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date when the Know Your Customer compliance program was completed for this individual.
KYCStatus__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Status of the Know Your Customer compliance program for a specific individual.
LastInteraction__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date of the last meeting or call.
LastReview__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date of the last review.
LastTransactionDate__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date of the last transaction.
LastTransactionDateJointOwner__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update

Field Name	Details
	Description Date of the last transaction - joint owner.
`LastTransactionDatePrimaryOwner__c`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date of the last transaction - primary owner.
`LastUsedChannel__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Most recent contact channel. Valid values: • Branch • Call Center • Mobile • Web • Other
`LengthOfRelationship__c`	**Type** double **Properties** Filter, Nillable, Sort **Description** Individual's tenure with the financial institution.
`LifetimeValue__c`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Individual's lifetime net asset value to your financial institution.
`MarketingSegment__c`	**Type** multipicklist **Properties** Create, Filter, Nillable, Update

Field Name	Details
	Description Market segments that characterize this individual. Valid values: • Mass Affluent • High Net Worth • Female Investor • Millennial
`NetWorth__c`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Value of this individual's assets minus liabilities.
`NextInteraction__c`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date of the next meeting or call.
`NextReview__c`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date of the next review.
`NextStatementDate__c`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date of the next statement.
`Notes__c`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Important notes about the individual. Label is `Important Notes`.

Field Name	Details
`PersonalInterests__c`	**Type** multipicklist **Properties** Create, Filter, Nillable, Update **Description** Personal areas of interest. Valid values: • Cooking • College Basketball • Environment • Hiking • Biking • Wine
`PrimaryContact__c`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Read only. ID of the contact record associated with this individual's account record.
`RecordTypeName__c`	**Type** string **Properties** Filter, Nillable, Sort **Description** Record type for this account. The value is copied from `RecordType.Name` and can't be changed.
`ReferredByContact__c`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** External contact referring this individual.
`ReferredByUser__c`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update

Field Name	Details
	Description Internal Salesforce user who made the referral.
`RelationshipStartDate__c`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date this individual started working with your company.
`ReviewFrequency__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Frequency of reviews. Valid values: • Monthly • Quarterly • Annually
`RiskTolerance__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Level of risk this individual is comfortable with. Valid values: • Aggressive • Conservative • Moderate • None
`ServiceModel__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Service level assigned to this individual. Valid values: • Tier 1 • Tier 2 • Tier 3

Field Name	Details
SourceSystemId__c	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies this individual in an external data source.
Stage__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the stage of the deal. Possible values are: • Closed • Execution • Mandate • Pitch
Status__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Individual's status with your firm. Valid values: • Active • Closed • Deceased • Delinquent • Dormant • Inactive • Onboarding • Prospect
TimeHorizon__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Individual's investment time frame. Valid values: • Long Term

Field Name	Details
	• Medium Term • Short Term
`TotalAUMJointOwner__c`	**Type** currency **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update **Description** Total value of financial accounts that your company manages, for which this individual is the joint owner of jointly owned accounts.
`TotalAUMPrimaryOwner__c`	**Type** currency **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update **Description** Total value of financial accounts that your company manages, for which this individual is the primary owner of either separately owned or jointly owned accounts.
`TotalBankDeposits__c`	**Type** currency **Properties** Filter, Nillable, Sort **Description** Value of this individual's accounts. Calculated as the sum of `TotalBankDepositsPrimaryOwner__c` and `TotalBankDepositsJointOwner__c`.
`TotalBankDepositsJointOwner__c`	**Type** currency **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update **Description** Total value of accounts, for which this individual is the joint owner of jointly owned accounts.
`TotalBankDepositsPrimaryOwner__c`	**Type** currency **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update

Field Name	Details
	Description Total value of accounts, for which this individual is the primary owner of either separately owned or jointly owned accounts.
`TotalClaimAmountPaid__c`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The total amount paid for all claims for the active policies for a policyholder's primary household.
`TotalFinAcctsJointOwner__c`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Total value of financial account balances (excluding insurance policies), for which this individual is the joint owner of jointly owned accounts. Label is `Total Financial Accounts Joint Owner`.
`TotalFinAcctsPrimaryOwner__c`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Total value of financial account balances (excluding insurance policies), for which this individual is the primary owner of either separatley owned or jointly owned accounts. Label is `Total Financial Accounts Primary Owner`.
`TotalFinancialAccounts__c`	**Type** currency **Properties** Filter, Nillable, Sort **Description** Value of all financial accounts, excluding insurance policies. Calculated as the sum of `TotalBankDeposits__c` and `TotalInvestments__c`.
`TotalHeldFinAcctsJointOwner__c`	**Type** double

Field Name	Details
	Properties Create, Filter, Nillable, Sort, Update **Description** Total value of held financial account balances, for which this individual is the joint owner of jointly owned accounts. Label is `Total Held Financial Accounts Joint`.
`TotalHeldFinAcctsPrimaryOwner__c`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Total value of held financial account balances, for which this individual is the primary owner of either separately owned or jointly owned accounts. Label is `Total Held Financial Accounts Primary`.
`TotalHouseholdPremiums__c`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The total premiums for all active policies for a policyholder's primary household.
`TotalInsurance__c`	**Type** currency **Properties** Filter, Nillable, Sort **Description** Value of this individual's insurance policies. Calculated as the sum of `TotalInsurancePrimaryOwner__c` and `TotalInsuranceJointOwner__c`.
`TotalInsuranceJointOwner__c`	**Type** currency **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update **Description** Total value of insurance policies, for which the individual is the joint owner of jointly owned accounts.

Field Name	Details
`TotalInsurancePrimaryOwner__c`	**Type** currency **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update **Description** Total value of insurance policies, for which the individual is the primary owner of either separately owned or jointly owned accounts.
`TotalInvestments__c`	**Type** currency **Properties** Filter, Nillable, Sort **Description** Value of investment accounts. Calculated as the sum of `TotalInvestmentsPrimaryOwner__c` and `TotalInvestmentsJointOwner__c`.
`TotalInvestmentsJointOwner__c`	**Type** currency **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update **Description** Total value of investment accounts, for which the individual is the joint owner of jointly owned accounts.
`TotalInvestmentsPrimaryOwner__c`	**Type** currency **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update **Description** Total value of investment accounts, for which the individual is the primary owner of either separately owned or jointly owned accounts.
`TotalLiabilities__c`	**Type** currency **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update **Description** Value of individual's liabilities, stored as a negative value. Calculated as the sum of `TotalLiabilitiesPrimaryOwner__c` and `TotalLiabilitiesJointOwner__c`.

Field Name	Details
`TotalLiabilitiesJointOwner__c`	**Type** currency **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update **Description** Total value of liabilities, for which this individual is the joint owner of jointly owned liabilities.
`TotalLiabilitiesPrimaryOwner__c`	**Type** currency **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update **Description** Total value of liabilities, for which this individual is the primary owner of either separately owned or jointly owned liabilities.
`TotalNonfinancialAssets__c`	**Type** double **Properties** Filter, Nillable, Sort **Description** Value of tangible assets such as collectibles or precious metals. Calculated as the sum of `TotalNonfinancialAssetsPrimaryOwner__c` and `TotalNonfinancialAssetsJointOwner__c`.
`TotalNonfinancialAssetsJointOwner__c`	**Type** currency **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update **Description** Total value of tangible assets such as collectibles or precious metals, for which this individual is the joint owner of jointly owned assets.
`TotalNonfinancialAssetsPrimaryOwner__c`	**Type** currency **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update **Description** Total value of tangible assets such as collectibles or precious metals, for which this individual is the primary owner of either separately owned or jointly owned assets.

Field Name	Details
TotalNumberOfFinAccounts__c	**Type** Integer **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Total numbers of financial accounts that are managed by a specific firm.
TotalNumberOfFinAccountsJointOwner__c	**Type** Integer **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Total numbers of financial accounts for which the client is a joint owner.
TotalNumberOfFinAccountsPrimaryOwner__c	**Type** Integer **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Total numbers of financial accounts for which the client is the primary owner.
TotalOutstandingCredit__c	**Type** currency **Properties** Filter, Nillable, Sort **Description** Value of a client's total outstanding credit from the financial accounts that are managed by a specific firm.
TotalOutstandingCreditJointOwner__c	**Type** currency **Properties** Filter, Nillable, Sort **Description** Value of the total outstanding credit for which the client is a joint owner from the financial accounts that are managed by a specific firm.
TotalOutstandingCreditPrimaryOwner__c	**Type** currency **Properties** Filter, Nillable, Sort

Field Name	Details
	Description Value of the total outstanding credit for which the client is the primary owner from the financial accounts that are managed by a specific firm.
`TotalPremium__c`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Policyholder's total annual premium.
`TotalRevenue__c`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Total amount of revenue for a client.
`TransactionSubtype__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Subtype of transaction, such as: • Cash Deposit • On-Us Check Deposit • Transit Check Deposit • Foreign Cash Deposit • Bill Payment • EFT • ATM Deposit • ATM Withdrawal • POS withdrawal • Misc. Credit • Misc. Debit • Loan Payment • Mortgage Payment • Credit Card Payment • Credit Card Cash Advance • Internal Funds Transfer

Field Name	Details
	• Reversal • Interest Earned • Fee • Merchant Charge
`WaiverReason__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Reason for waiving the charges or fees, such as: • Duplicate fees charged • Fees Discovery • Maintain customer relationship • Notification not received • Others
`WalletShare__c`	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** Read only. Percentage of this individual'sfinancial assets that your company manages or administers. Calculated as the percent of financial accounts that are held (`FinancialAccount__c.HeldAway` is `false`).

FinServ_AccountAccountRelation__c

Represents a relationship between two accounts, such as between a household and a business account.

Supported Calls

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

Fields

Note: To avoid DML errors on insert, read-only access at minimum is required for all fields that have a default value.

Field	Details
`Account__c`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Account that `RelatedAccount__c` is related from.
`Active__c`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the relationship is active (`true`) or not (`false`). The default value is `false`.
`CurrencyIsoCode`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** If multiple currencies is enabled, contains the currency ISO code associated with the record.
`DeclarationType__c`	**Type** multipicklist **Properties** Create, Filter, Nillable, Update **Description** Specifies the formal manner or approach used to officially state the stakeholder's role or position. Possible values are: • `Official Register` • `Primary Research` • `Self declaration` • `Third Party` • `Verified`
`EndDate__c`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Date when the relationship ended.
`ExternalId__c`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies the relationship in an external data source.
`InverseRelationship__c`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Uniquely identifies the relationship between `Account` and `RelatedAccount__c` so that it can be referenced by a trigger that creates the inverse relationship record.
`IsShareholder__c`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the stakeholder is a shareholder (true) or not (false). The default value is `false`.
`Name`	**Type** string **Properties** Defaulted on create, Filter, idLookup, Sort **Description** Auto-number identifier for the relationship. Label is `Account Relation Name`.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the user who created the relationship record.
`RelatedAccount__c`	**Type** reference

Field	Details
	Properties Filter, Group, Nillable, Sort **Description** Account that `Account__c` is related to.
`Role__c`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** Role that describes how `RelatedAccount__c` is related to `Account__c`.
`ShareholderHierarchyLevel__c`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the hierarchical level between the account and the intermediate shareholder. The shareholder hierarchy level is applicable only to an intermediate share holder.
`ShareholderHierarchyRole__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the shareholder's ownership type. Possible values are: • `Domestic Ultimate Owner` • `Immediate Shareholder` • `Intermediate Shareholder` • `Ultimate Beneficial Owner`
`ShareholderType__c`	**Type** multipicklist **Properties** Create, Filter, Nillable, Update **Description** Specifies the type of the shareholder. Possible values are: • `Shareholding`

Field	Details
	• `Voting Rights` • `Beneficiary of a Trust` • `Sole Proprietor` • `Partner`
`SourceSystemId__c`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies the relationship in an external data source.
`StartDate__c`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date when the relationship started.
`TotalSharePercent__c`	**Type** percent **Properties** Create, Filter, Nillable,Sort, Update **Description** The total percentage of shares owned by the stakeholder, combining both direct and indirect ownership.

FinServ AccountContactRelation Custom Fields

Represents the relationship between an individual (specifically the contact part of the individual) and the household (account) that the individual is a member of. AccountContactRelation is a standard object that is available through the Shared Contacts feature. Custom fields extend the AccountContactRelation standard object for use in Financial Services Cloud.

Supported Calls

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

Fields

Field	Details
`DecisionMakingAuthorityType`	**Type** multipicklist **Properties** Create, Filter, Nillable, Restricted picklist, Update **Description** Specifies the type of the decision-making authority. Possible values are: • `Authorized Signatory` • `Board Member` • `Senior Managing Official`
`DeclarationType`	**Type** multipicklist **Properties** Create, Filter, Nillable, Restricted picklist, Update **Description** Specifies the formal manner or approach used to officially state the stakeholder's role or position. Possible values are: • `Official Register` • `Primary Research` • `Self declaration` • `Third Party` • `Verified`
`IsDecisionMakingAuthority`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the stakeholder is a decision-making authority (true) or not (false). The default value is `false`.
`IncludeInGroup__c`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	Description Includes this account in a related individual's primary group.
`IsShareholder`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the stakeholder is a shareholder (true) or not (false). The default value is `false`.
`Primary__c`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates the primary member of a group (`true`) or not (`false`).
`PrimaryGroup__c`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates a person's primary group. You can roll up summary fields only to a person's primary group if `PrimaryGroup__c` is set to `true`.
`Rollups__c`	**Type** multipicklist **Properties** Create, Filter, Nillable, Update **Description** Records associated with the individual that are included in household roll-up summaries. Valid values: • All • Tasks • Events • Financial Accounts • Assets and Liabilities • Financial Goals

Field	Details
`ShareholderHierarchyLevel`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the hierarchical level between the account and the intermediate shareholder. The shareholder hierarchy level is applicable only to an intermediate share holder.
`ShareholderHierarchyRole`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the shareholder's ownership type. Possible values are: • `Domestic Ultimate Owner` • `Immediate Shareholder` • `Intermediate Shareholder` • `Ultimate Beneficial Owner`
`ShareholderType`	**Type** multipicklist **Properties** Create, Filter, Nillable, Restricted picklist, Update **Description** Specifies the type of the shareholder. Possible values are: • `Shareholding` • `Voting Rights` • `Beneficiary of a Trust` • `Sole Proprietor` • `Partner`
`StartDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the relationship between the applicant and the related applicant started.

Field	Details
SourceSystemId__c	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies the individual in an external data source.
TotalSharePercent	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** The total percentage of shares owned by the stakeholder, combining both direct and indirect ownership.

FinServ_Alert__c

Represents notifications to alert advisors about their client accounts.

Supported Calls

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

Fields

Field	Details
Account__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** A lookup field to an account that alerts are related to.
Active__c	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	Description Indicates whether an alert is active.
`FinancialAccount__c`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The financial account that alerts are related to.
`Message__c`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The main content of an alert.
`MessageDescription__c`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** An optional description for the main content of an alert as specified in the `Message__c` field. This text appears below the main content.
`Priority__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** An indication of the urgency of an alert. Valid values: • High • Low • Medium
`Severity__c`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update **Description** The type of alert. Valid values:

Field	Details
	• Error • Info • Warning
`SourceSystemId__c`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of a record from the external system that triggered the alert.

FinServ_AssetsAndLiabilities__c

Represents assets or liabilities that are not represented in a client's financial accounts, such as real estate or collectibles.

Supported Calls

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

Fields

Field	Details
`Amount__c`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Amount of an asset (positive) or liability (negative).
`AssetsAndLiabilitiesSource__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Data source. Label is `Source`. Valid values: • Manual Entry • Yodlee

Field	Details
AssetsAndLiabilitiesType__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Type of asset or liability. Label is `Type`. Valid values: • Auto Loan • Mortgage • Other • Personal Loan • Real Estate • Equipment • Automobile • Collection • Gold • Jewelry • Cash
CurrencyIsoCode	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** If multiple currencies is enabled, contains the currency ISO code associated with the record.
Description__c	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Description of this asset or liability.
FinancialAccount__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Financial account that this asset or liability is related to.

Field	Details
Household__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Household that this asset or liability is associated with.
JointOwner__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Joint owner, if any, for this asset or liability.
LastReferencedDate	**Type** date **Properties** Filter, Nillable, Sort, **Description** Timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Timestamp for when the current user last viewed this record.
Name	**Type** string **Properties** Create, Defaulted on create, Filter, Group, idLookup, Nillable, Sort, Update **Description** Name of this asset or liability.
OwnerId	**Type** reference **Properties** Create, Defaulted on createFilter, Group, Sort, Update **Description** ID of the user who created the asset or liability record.

Field	Details
Ownership__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Type of ownership for this asset or liability. Valid values: • Individual • Joint • Trust
OwnerType__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Client's ownership role (primary or joint) for this asset or liability. The value is specified by a trigger.
PrimaryOwner__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Primary owner of this asset or liability.
RecordTypeId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the record type associated with this asset or liability.
SourceSystemId__c	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies the asset or liability in an external data source.

FinServ AuthorizationForm Custom Fields

Represents the specific version and effective dates of a form that is associated with consent, such as a privacy policy or terms and conditions. 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()`

Fields

Field	Details
`AssociatedRegulation__c`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The specific regulation to which this authorization form is related.
`ConsentDurationDayCount__c`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Represents the number of days for which this Authorization Form is valid for, upon providing consent.

Associated Objects

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

AuthorizationFormHistory **on page 1021**
History is available for tracked fields of the object.

AuthorizationFormShare **on page 1029**
Sharing is available for the object.

FinServ AuthorizationFormConsent Custom Fields

Represents the date and way in which a user consented to an authorization form. 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()`

Fields

Field	Details
`Browser__c`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** Collects data at the time of consent from the browser of the person providing consent.
`ConsentExpirationDateTime__c`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** Specifies the length of time for which this particular consent, if accepted, lasts. This is a formula field that adds the Consent Captured Date time and Consent Duration Days on the Auth Form entity.
`Email__c`	**Type** email **Properties** Filter, Group, Nillable, Sort **Description** Collects data at the time of consent from the email address of the person providing consent.
`InfoAuthRequestFormId__c`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Identification of the Information Authorization Request Form related to this record. This field is a relationship field. **Relationship Name** InfoAuthRequestForm **Relationship Type** Lookup

Field	Details
	Refers To InfoAuthRequestForm
IP__c	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** Collects data at the time of consent from the IP address of the person providing consent.
Location__c	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** Collects data at the time of consent from the geo location of the person providing consent.

Associated Objects

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

AuthorizationFormConsentChangeEvent on page 1009
Change events are available for the object.

AuthorizationFormConsentHistory on page 1021
History is available for tracked fields of the object.

AuthorizationFormConsentShare on page 1029
Sharing is available for the object.

FinServ AuthorizationFormText Custom Fields

Represents an authorization form's text and language settings. 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()`

Fields

Field	Details
IsActive__c	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** There can only be one Active Authorization Form Text at any given time with an Auth Form and locale combination. When a Consent Request is sent on a Data Use Purpose, all of the active authorization forms associated with the Data Use Purpose are selected, and all of the active authorization form text on the authorization forms is served to the person providing consent.
IsReadOnly__c	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The form is read only and not editable. When you make an Authorization Form Text active at any point, IsReadOnly must be permanently false.
LastActivationDateTime__c	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** You can sort the list of authorization texts based on their most recent activation date.

Associated Objects

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

AuthorizationFormTextFeed **on page 1013**
Feed tracking is available for the object.

AuthorizationFormTextHistory **on page 1021**
History is available for tracked fields of the object.

FinServ_BillingStatement__c

Represents a billing statement for an individual's financial account.

Supported Calls

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

Fields

Field	Details
`BalanceTransfers__c`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Balance transfer details.
`BillingPeriodEnd__c`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Billing period end date.
`BillingPeriodStart__c`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Billing period start date.
`CashAdvances__c`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Cash advance amount for the billing period.
`Deposits__c`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Deposit made to the account during the billing period.

Field	Details
EndingBalance__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Balance due on the account during the billing period.
FeesCharged__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Fee charged during the billing period.
FinancialAccount__c	**Type** reference **Properties** Create, Filter, Group, Sort **Description** Financial account associated with this billing statement.
InsurancePolicy__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The insurance policy associated with the billing statement
InterestThisPeriod__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Interest charged on the account during the billing period.
InterestYTD__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Interest charged year to date.

Field	Details
LastPaymentDate__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date of the last payment made on the account.
MinimumPaymentDue__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Minimum payment required by the due date.
OtherCredits__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Other credits made during the billing period.
PastDueAmount__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Amount past due as of the statement date.
PaymentDueDate__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date a payment is due.
Payments__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Payment received since the last statement.

Field	Details
PreviousBalance__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Account balance at the end of the previous billing period.
Purchases__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Total purchases made during the current billing period.
SourceSystemId__c	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies the individual in an external data source.
StatementDate__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date the current statement was generated.
Withdrawals__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Cash withdrawal made during the billing period.

FinServ_Card__c

Represents credit or debit card associated with this financial account.

Supported Calls

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

Fields

Field	Details
`AccountHolder__c`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Individual credit or debit holder associated with this card.
`Active__c`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the account is active (`true`) or inactive (`false`). Default is `true`.
`BinNumber__c`	**Type** double **Properties** CreateFilter, Nillable, SortUpdate **Description** Bank Identification number for this account.
`FinancialAccount__c`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Financial account associated with this card.
`OwnershipType__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Type of ownership for this card. Valid values:

Field	Details
	• Primary • Authorized • Other
SourceSystemId__c	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies the financial account in an external data source.
ValidUntil__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date card is no longer valid.

FinServ_ChargesAndFees__c

Represents agreed-to fees and charges for servicing an individual's financial account.

Supported Calls

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

Fields

Field	Details
AnnualAccountCharge__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Annual fee for maintaining an account.
AnnualMembershipFee__c	**Type** currency

Field	Details
	Properties Create, Filter, Nillable, Sort, Update **Description** Annual fee for credit card membership.
APR__c	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** Annual percentage rate.
APRType__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Annual percentage rate type. Valid values: • Fixed • Other • Variable
ATMFee__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** ATM fee.
BalanceTransferAPR__c	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** APR for balance transfers.
CashAdvanceFee__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description Fee for withdrawing cash from a credit card account.
CashAPR__c	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** Annual percentage rate applied to cash withdrawals.
CashAPRType__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** APR applied to cash borrowed from a credit card account. Valid values: • Fixed • Other • Variable
ForeignTransactionFee__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Fee for making a credit card purchase in a foreign currency.
InsufficientFundsFee__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Fee for attempting to make a purchase or payment from an account with insufficient funds.
InterestRate__c	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** Interest rate on a loan account (APR%).

Field	Details
LatePaymentFee__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Fee for not paying the minimum payment by the due date.
MaximumTransactionFee__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Fee for exceeding the maximum monthly transaction limit.
MonthlyServiceFee__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Monthly account maintenance charge.
OverdraftFees__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Fee for a withdrawal that exceeds the available balance.
ReplacementCardFee__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Fee for debit or credit card replacement.
ReturnedCheckFee__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Fee for writing or receiving a check returned due to insufficient funds.

Field	Details
SourceSystemId__c	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies the individual in an external data source.
StatementFee__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Fee for mailing an account statement.
StopPaymentFee__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Fee for requesting a stop payment on a check or payment that hasn't been processed yet.

FinServ Contact Custom Fields

Represents information about an individual that pertains to their personhood, irrespective of their relationship with your firm, such as their birthdate or tax ID number. Custom fields extend the Contact object for use in Financial Services Cloud.

Fields

Field Name	Details
Affiliations__c	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Memberships in clubs, organizations, and alumni associations.
Age__c	**Type** double

Field Name	Details
	Properties Filter, Nillable, Sort **Description** Age. Calculated from `Contact.Birthdate`.
`AgeAsText__c`	**Type** string **Properties** Filter, Nillable, Sort **Description** Age expressed in years, months, and days. Calculated from `Contact.Birthdate`. Label is **Age Text**.
`AnnualIncome__c`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Annual income.
`BillingAddress__c`	**Type** string **Properties** Filter, Nillable, Sort **Description** The compound form of the billing address. Based on these address fields: `Account.BillingStreet`, `Account.BillingCity`, `Account.BillingState`, `Account.BillingPostalCode`, and `Account.BillingCountry`.
`Citizenship__c`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Citizenship.
`CommunicationPreferences__c`	**Type** multipicklist **Properties** Create, Filter, Nillable, Update

Field Name	Details
	Description Preferred communication channel. Valid values: • Balance Activities:Email • Balance Activities:Phone • Balance Activities:SMS • Fraud:Email • Fraud:Phone • Fraud:SMS • Promotions:Email • Promotions:Phone • Promotions:SMS
`ContactPreference__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Preferred communication method. Valid values: • Email • Mobile • Phone
`CountryOfBirth__c`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** This individual's country of birth. Valid values: • Afghanistan • Aland Islands • Albania • Algeria • Andorra • Angola • Anguilla • Antarctica • Antigua and Barbuda

Field Name	Details
	• Argentina • Armenia • Aruba • Australia • Austria • Azerbaijan • Bahamas • Bahrain • Bangladesh • Barbados • Belarus • Belgium • Belize • Benin • Bermuda • Bhutan • Bolivia, Plurinational State of • Bonaire, Sint Eustatius and Saba • Bosnia and Herzegovina • Botswana • Bouvet Island • Brazil • British Indian Ocean Territory • Brunei Darussalam • Bulgaria • Burkina Faso • Burundi • Cambodia • Cameroon • Canada • Cape Verde • Cayman Islands • Central African Republic • Chad • Chile • China • Christmas Island • Cocos (Keeling) Islands

Field Name	Details
	• Colombia • Comoros • Congo • Congo, the Democratic Republic of the • Cook Islands • Costa Rica • Cote d'Ivoire • Croatia • Cuba • Curaçao • Cyprus • Czech Republic • Denmark • Djibouti • Dominica • Dominican Republic • Ecuador • Egypt • El Salvador • Equatorial Guinea • Eritrea • Estonia • Ethiopia • Falkland Islands (Malvinas) • Faroe Islands • Fiji • Finland • France • French Guiana • French Polynesia • French Southern Territories • Gabon • Gambia • Georgia • Germany • Ghana • Gibraltar • Greece

Field Name	Details
	• Greenland • Grenada • Guadeloupe • Guatemala • Guernsey • Guinea • Guinea-Bissau • Guyana • Haiti • Heard Island and McDonald Islands • Holy See (Vatican City State) • Honduras • Hungary • Iceland • India • Indonesia • Iran, Islamic Republic of • Iraq • Ireland • Isle of Man • Israel • Italy • Jamaica • Japan • Jersey • Jordan • Kazakhstan • Kenya • Kiribati • Korea, Democratic People's Republic of • Korea, Republic of • Kuwait • Kyrgyzstan • Lao People's Democratic Republic • Latvia • Lebanon • Lesotho • Liberia

Field Name	Details
	• Libyan Arab Jamahiriya • Liechtenstein • Lithuania • Luxembourg • Macao • Macedonia, the former Yugoslav Republic of • Madagascar • Malawi • Malaysia • Maldives • Mali • Malta • Martinique • Mauritania • Mauritius • Mayotte • Mexico • Moldova, Republic of • Monaco • Mongolia • Montenegro • Montserrat • Morocco • Mozambique • Myanmar • Namibia • Nauru • Nepal • Netherlands • New Caledonia • New Zealand • Nicaragua • Niger • Nigeria • Niue • Norfolk Island • Norway • Oman

Field Name	Details
	• Pakistan • Palestine • Panama • Papua New Guinea • Paraguay • Peru • Philippines • Pitcairn • Poland • Portugal • Qatar • Reunion • Romania • Russian Federation • Rwanda • Saint Barthélemy • Saint Helena, Ascension and Tristan da Cunha • Saint Kitts and Nevis • Saint Lucia • Saint Martin (French part) • Saint Pierre and Miquelon • Saint Vincent and the Grenadines • Samoa • San Marino • Sao Tome and Principe • Saudi Arabia • Senegal • Serbia • Seychelles • Sierra Leone • Singapore • Sint Maarten (Dutch part) • Slovakia • Slovenia • Solomon Islands • Somalia • South Africa • South Georgia and the South Sandwich Islands

Field Name	Details
	• South Sudan • Spain • Sri Lanka • Sudan • Suriname • Svalbard and Jan Mayen • Swaziland • Sweden • Switzerland • Syrian Arab Republic • Taiwan • Tajikistan • Tanzania, United Republic of • Thailand • Timor-Leste • Togo • Tokelau • Tonga • Trinidad and Tobago • Tunisia • Turkey • Turkmenistan • Turks and Caicos Islands • Tuvalu • Uganda • Ukraine • United Arab Emirates • United Kingdom • United States • Uruguay • Uzbekistan • Vanuatu • Venezuela, Bolivarian Republic of • Vietnam • Virgin Islands, British • Wallis and Futuna • Western Sahara • Yemen

Field Name	Details
	• Zambia • Zimbabwe
`CountryOfResidence__c`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Country of primary residence.
`CreatedFromLead__c`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether this individual was created from a converted lead (`true`) or not (`false`).
`CurrentEmployer__c`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Name of current employer.
`CustomerTimezone__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Primary time zone. Valid values: • Africa/Cairo • Africa/Johannesburg • Africa/Nairobi • America/Anchorage • America/Bogota • America/Buenos_Aires • America/Caracas • America/Chicago • America/Denver

Field Name	Details
	• America/El_Salvador • America/Halifax • America/Indianapolis • America/Lima • America/Los_Angeles • America/Mexico_City • America/New_York • America/Panama • America/Phoenix • America/Puerto_Rico • America/Santiago • America/Sao_Paulo • America/St_Johns • America/Tijuana • Asia/Baghdad • Asia/Bangkok • Asia/Calcutta • Asia/Colombo • Asia/Dacca • Asia/Dubai • Asia/Hong_Kong • Asia/Jakarta • Asia/Jerusalem • Asia/Kabul • Asia/Kamchatka • Asia/Karachi • Asia/Katmandu • Asia/Kuala_Lumpur • Asia/Kuwait • Asia/Manila • Asia Rangoon • Asia/Riyadh • Asia/Saigon • Asia/Seoul • Asia/Shanghai • Asia/Singapore • Asia/Taipei • Asia/Tashkent

Field Name	Details
	• Asia/Tbilisi • Asia/Tehran • Asia/Tokyo • Asia/Yekaterinburg • Atlantic/Bermuda • Atlantic/Cape_Verde • Atlantic/South_Georgia • Australia/Adelaide • Australia/Brisbane • Australia/Darwin • Australia/Lord_Howe • Australia/Perth • Australia/Sydney • Europe/Amsterdam • Europe/Athens • Europe/Berlin • Europe/Bucharest • Europe/Brussels • Europe/Dublin • Europe/Helsinki • Europe/Istanbul • Europe/Lisbon • Europe/London • Europe/Minsk • Europe/Moscow • Europe/Paris • Europe/Prague • Europe/Rome • GMT • Pacific/Auckland • Pacific/Chatham • Pacific/Enderbury • Pacific/Fiji • Pacific/Guadalcanal • Pacific/Honolulu • Pacific/Kiritimati • Pacific/Niue • Pacific/Norfolk

Field Name	Details
	• Pacific/Pago_Pago • Pacific/Tongatapu
`EmailVerified__c`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates that the individual's email address has been verified (`true`), or not (`false`).
`EmployedSince__c`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Tenure with current employer.
`Facebook__c`	**Type** url **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Facebook profile URL.
`FaxVerified__c`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates that the individual's fax number has been verified (`true`), or not (`false`).
`Gender__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Gender. Valid values: • Female • Male • Decline to Specify

Field Name	Details
	• Other
`HomeOwnership__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist Sort, Update **Description** Relationship to primary residence. Valid values: • Rent • Own • Other
`HomePhoneVerified__c`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates that the home phone number has been verified (`true`), or not (`false`).
`IndividualId__c`	**Type** string **Properties** Filter, Nillable, Sort **Description** Unique ID that relates this individual's contact record to its account record. Calculated from `Account.IndividualId__c`.
`IndividualType__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Type of individual. Valid values: • Individual
`LanguagesSpoken__c`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update

Field Name	Details
	Description Languages spoken.
`LastFourDigitSSN__c`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Last four digits of the individual's Social Security number. This field is encrypted.
`LinkedIn__c`	**Type** url **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** LinkedIn profile URL.
`MailingAddress__c`	**Type** string **Properties** Filter, Nillable, Sort **Description** The compound form of the mailing address. Based on these address fields: `MailingStreet`, `MailingCity`, `MailingState`, `MailingPostalCode`, and `MailingCountry`.
`MaritalStatus__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Marital status. Valid values: • Single • Married • Separated • Divorced • Widowed
`MarketingOptOut__c`	**Type** boolean

Field Name	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indication that the individual has opted out of receiving marketing materials. (`true`) or not (`false`).
`MobileVerified__c`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates the mobile phone number has been verified (`true`), or not (`false`).
`MostUsedChannel__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Most frequent communication channel. Valid values: • Mobile • Web • Branch • Call Center • Other
`MotherMaidenName__c`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Maiden name of the individual's mother.
`NextLifeEvent__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update

Field Name	Details
	Description Next major life event. Valid values: • Children • Critical Family Event • Enter Workforce • First Home Purchase • Higher Education • Moving • Promotion • Renovations • Retirement • Returning to Workforce
`NumberOfChildren__c`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Number of children.
`NumberOfDependents__c`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Number of dependents.
`Occupation__c`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Occupation.
`OtherAddress__c`	**Type** string **Properties** Filter, Nillable, Sort

Field Name	Details
	Description The compound form of the other address. Based on these address fields: `OtherStreet`, `OtherCity`, `OtherState`, `OtherPostalCode`, and `OtherCountry`.
`PreferredName__c`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort **Description** This individual's preferred name.
`PrimaryAddressIsBilling__c`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the billing address is the primary address (`true`) or not (`false`).
`PrimaryAddressIsMailing__c`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the mailing address is the primary address (`true`) or not (`false`).
`PrimaryAddressIsOther__c`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the other address is the primary address (`true`) or not (`false`).
`PrimaryAddressIsShipping__c`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the shipping address is the primary address (`true`) or not (`false`).

Field Name	Details
PrimaryCitizenship__	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Country of primary citizenship. Valid values: • Afghanistan • Aland Islands • Albania • Algeria • Andorra • Angola • Anguilla • Antarctica • Antigua and Barbuda • Argentina • Armenia • Aruba • Australia • Austria • Azerbaijan • Bahamas • Bahrain • Bangladesh • Barbados • Belarus • Belgium • Belize • Benin • Bermuda • Bhutan • Bolivia, Plurinational State of • Bonaire, Sint Eustatius and Saba • Bosnia and Herzegovina • Botswana • Bouvet Island • Brazil

Field Name	Details
	• British Indian Ocean Territory • Brunei Darussalam • Bulgaria • Burkina Faso • Burundi • Cambodia • Cameroon • Canada • Cape Verde • Cayman Islands • Central African Republic • Chad • Chile • China • Christmas Island • Cocos (Keeling) Islands • Colombia • Comoros • Congo • Congo, the Democratic Republic of the • Cook Islands • Costa Rica • Cote d'Ivoire • Croatia • Cuba • Curaçao • Cyprus • Czech Republic • Denmark • Djibouti • Dominica • Dominican Republic • Ecuador • Egypt • El Salvador • Equatorial Guinea • Eritrea • Estonia

Field Name	Details
	• Ethiopia • Falkland Islands (Malvinas) • Faroe Islands • Fiji • Finland • France • French Guiana • French Polynesia • French Southern Territories • Gabon • Gambia • Georgia • Germany • Ghana • Gibraltar • Greece • Greenland • Grenada • Guadeloupe • Guatemala • Guernsey • Guinea • Guinea-Bissau • Guyana • Haiti • Heard Island and McDonald Islands • Holy See (Vatican City State) • Honduras • Hungary • Iceland • India • Indonesia • Iran, Islamic Republic of • Iraq • Ireland • Isle of Man • Israel • Italy

Field Name	Details
	• Jamaica • Japan • Jersey • Jordan • Kazakhstan • Kenya • Kiribati • Korea, Democratic People's Republic of • Korea, Republic of • Kuwait • Kyrgyzstan • Lao People's Democratic Republic • Latvia • Lebanon • Lesotho • Liberia • Libyan Arab Jamahiriya • Liechtenstein • Lithuania • Luxembourg • Macao • Macedonia, the former Yugoslav Republic of • Madagascar • Malawi • Malaysia • Maldives • Mali • Malta • Martinique • Mauritania • Mauritius • Mayotte • Mexico • Moldova, Republic of • Monaco • Mongolia • Montenegro • Montserrat

Field Name	Details
	• Morocco • Mozambique • Myanmar • Namibia • Nauru • Nepal • Netherlands • New Caledonia • New Zealand • Nicaragua • Niger • Nigeria • Niue • Norfolk Island • Norway • Oman • Pakistan • Palestine • Panama • Papua New Guinea • Paraguay • Peru • Philippines • Pitcairn • Poland • Portugal • Qatar • Reunion • Romania • Russian Federation • Rwanda • Saint Barthélemy • Saint Helena, Ascension and Tristan da Cunha • Saint Kitts and Nevis • Saint Lucia • Saint Martin (French part) • Saint Pierre and Miquelon • Saint Vincent and the Grenadines

Field Name	Details
	• Samoa • San Marino • Sao Tome and Principe • Saudi Arabia • Senegal • Serbia • Seychelles • Sierra Leone • Singapore • Sint Maarten (Dutch part) • Slovakia • Slovenia • Solomon Islands • Somalia • South Africa • South Georgia and the South Sandwich Islands • South Sudan • Spain • Sri Lanka • Sudan • Suriname • Svalbard and Jan Mayen • Swaziland • Sweden • Switzerland • Syrian Arab Republic • Taiwan • Tajikistan • Tanzania, United Republic of • Thailand • Timor-Leste • Togo • Tokelau • Tonga • Trinidad and Tobago • Tunisia • Turkey • Turkmenistan

Field Name	Details
	• Turks and Caicos Islands • Tuvalu • Uganda • Ukraine • United Arab Emirates • United Kingdom • United States • Uruguay • Uzbekistan • Vanuatu • Venezuela, Bolivarian Republic of • Vietnam • Virgin Islands, British • Wallis and Futuna • Western Sahara • Yemen • Zambia • Zimbabwe
`PrimaryLanguage__c`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** This individual's primary language. Valid values: • Abkhaz • Adyghe • Afrikaans • Akan • Albanian • American Sign Language • Amharic • Arabic • Aragonese • Aramaic • Armenian • Aymara • Balinese

Field Name	Details
	• Basque • Betawi • Bosnian • Breton • Bulgarian • Cantonese • Catalan • Cherokee • Chickasaw • Chinese • Coptic • Cornish • Corsican • Crimean Tatar • Croatian • Czech • Danish • Dawro • Dutch • English • Esperanto • Estonian • Ewe • Fiji Hindi • Filipino • Finnish • French • Galician • Georgian • German • Greek, Modern • Greenlandic • Haitian Creole • Hawaiian • Hebrew • Hindi • Hungarian • Icelandic

Field Name	Details
	• Indonesian • Inuktitut • Irish (Gaelic) • Italian • Japanese • Javanese • Kabardian • Kalasha • Kannada • Kashubian • Khmer • Kinyarwanda • Korean • Kurdish/Kurdî • Ladin • Latgalian • Latin • Lingala • Livonian • Lojban • Low German • Lower Sorbian • Macedonian • Malay • Malayalam • Mandarin • Manx • Maori • Mauritian Creole • Min Nan • Mongolian • Norwegian • Oriya • Pangasinan • Papiamentu • Pashto • Persian • Pitjantjatjara

Field Name	Details
	• Polish • Portuguese • Quenya • Rapa Nui • Romanian • Russian • Scots • Scottish Gaelic • Serbian • Serbo-Croatian • Sinhalese • Slovak • Slovene • Spanish • Swahili • Swedish • Tagalog • Tajik • Tamil • Tarantino • Telugu • Thai • Tok Pisin • Turkish • Twi • Ukrainian • Upper Sorbian • Urdu • Uzbek • Venetian • Vietnamese • Vilamovian • Võrro • Welsh • Xhosa • Yiddish • Zazaki

Field Name	Details
ReferredByContact__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** External contact referring this individual.
ReferredByUser__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Internal Salesforce user who made the referral.
ReferrerScore__c	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** A value of 0 to 100. A high score reflects a high rate of referral conversion.
SecondaryCitizenship__	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Country of secondary citizenship. Valid values: • Afghanistan • Aland Islands • Albania • Algeria • Andorra • Angola • Anguilla • Antarctica • Antigua and Barbuda • Argentina • Armenia • Aruba

Field Name	Details
	• Australia • Austria • Azerbaijan • Bahamas • Bahrain • Bangladesh • Barbados • Belarus • Belgium • Belize • Benin • Bermuda • Bhutan • Bolivia, Plurinational State of • Bonaire, Sint Eustatius and Saba • Bosnia and Herzegovina • Botswana • Bouvet Island • Brazil • British Indian Ocean Territory • Brunei Darussalam • Bulgaria • Burkina Faso • Burundi • Cambodia • Cameroon • Canada • Cape Verde • Cayman Islands • Central African Republic • Chad • Chile • China • Christmas Island • Cocos (Keeling) Islands • Colombia • Comoros • Congo

Field Name	Details
	• Congo, the Democratic Republic of the • Cook Islands • Costa Rica • Cote d'Ivoire • Croatia • Cuba • Curaçao • Cyprus • Czech Republic • Denmark • Djibouti • Dominica • Dominican Republic • Ecuador • Egypt • El Salvador • Equatorial Guinea • Eritrea • Estonia • Ethiopia • Falkland Islands (Malvinas) • Faroe Islands • Fiji • Finland • France • French Guiana • French Polynesia • French Southern Territories • Gabon • Gambia • Georgia • Germany • Ghana • Gibraltar • Greece • Greenland • Grenada • Guadeloupe

Field Name	Details
	• Guatemala • Guernsey • Guinea • Guinea-Bissau • Guyana • Haiti • Heard Island and McDonald Islands • Holy See (Vatican City State) • Honduras • Hungary • Iceland • India • Indonesia • Iran, Islamic Republic of • Iraq • Ireland • Isle of Man • Israel • Italy • Jamaica • Japan • Jersey • Jordan • Kazakhstan • Kenya • Kiribati • Korea, Democratic People's Republic of • Korea, Republic of • Kuwait • Kyrgyzstan • Lao People's Democratic Republic • Latvia • Lebanon • Lesotho • Liberia • Libyan Arab Jamahiriya • Liechtenstein • Lithuania

Field Name	Details
	• Luxembourg • Macao • Macedonia, the former Yugoslav Republic of • Madagascar • Malawi • Malaysia • Maldives • Mali • Malta • Martinique • Mauritania • Mauritius • Mayotte • Mexico • Moldova, Republic of • Monaco • Mongolia • Montenegro • Montserrat • Morocco • Mozambique • Myanmar • Namibia • Nauru • Nepal • Netherlands • New Caledonia • New Zealand • Nicaragua • Niger • Nigeria • Niue • Norfolk Island • Norway • Oman • Pakistan • Palestine • Panama

Field Name	Details
	• Papua New Guinea • Paraguay • Peru • Philippines • Pitcairn • Poland • Portugal • Qatar • Reunion • Romania • Russian Federation • Rwanda • Saint Barthélemy • Saint Helena, Ascension and Tristan da Cunha • Saint Kitts and Nevis • Saint Lucia • Saint Martin (French part) • Saint Pierre and Miquelon • Saint Vincent and the Grenadines • Samoa • San Marino • Sao Tome and Principe • Saudi Arabia • Senegal • Serbia • Seychelles • Sierra Leone • Singapore • Sint Maarten (Dutch part) • Slovakia • Slovenia • Solomon Islands • Somalia • South Africa • South Georgia and the South Sandwich Islands • South Sudan • Spain • Sri Lanka

Field Name	Details
	• Sudan • Suriname • Svalbard and Jan Mayen • Swaziland • Sweden • Switzerland • Syrian Arab Republic • Taiwan • Tajikistan • Tanzania, United Republic of • Thailand • Timor-Leste • Togo • Tokelau • Tonga • Trinidad and Tobago • Tunisia • Turkey • Turkmenistan • Turks and Caicos Islands • Tuvalu • Uganda • Ukraine • United Arab Emirates • United Kingdom • United States • Uruguay • Uzbekistan • Vanuatu • Venezuela, Bolivarian Republic of • Vietnam • Virgin Islands, British • Wallis and Futuna • Western Sahara • Yemen • Zambia • Zimbabwe

Field Name	Details
SecondaryLanguage__c	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** This individual's secondary language. Valid values: • Abkhaz • Adyghe • Afrikaans • Akan • Albanian • American Sign Language • Amharic • Arabic • Aragonese • Aramaic • Armenian • Aymara • Balinese • Basque • Betawi • Bosnian • Breton • Bulgarian • Cantonese • Catalan • Cherokee • Chickasaw • Chinese • Coptic • Cornish • Corsican • Crimean Tatar • Croatian • Czech • Danish • Dawro

Field Name	Details
	• Dutch • English • Esperanto • Estonian • Ewe • Fiji Hindi • Filipino • Finnish • French • Galician • Georgian • German • Greek, Modern • Greenlandic • Haitian Creole • Hawaiian • Hebrew • Hindi • Hungarian • Icelandic • Indonesian • Inuktitut • Irish (Gaelic) • Italian • Japanese • Javanese • Kabardian • Kalasha • Kannada • Kashubian • Khmer • Kinyarwanda • Korean • Kurdish/Kurdî • Ladin • Latgalian • Latin • Lingala

Field Name	Details
	• Livonian • Lojban • Low German • Lower Sorbian • Macedonian • Malay • Malayalam • Mandarin • Manx • Maori • Mauritian Creole • Min Nan • Mongolian • Norwegian • Oriya • Pangasinan • Papiamentu • Pashto • Persian • Pitjantjatjara • Polish • Portuguese • Quenya • Rapa Nui • Romanian • Russian • Scots • Scottish Gaelic • Serbian • Serbo-Croatian • Sinhalese • Slovak • Slovene • Spanish • Swahili • Swedish • Tagalog • Tajik

Field Name	Details
	• Tamil • Tarantino • Telugu • Thai • Tok Pisin • Turkish • Twi • Ukrainian • Upper Sorbian • Urdu • Uzbek • Venetian • Vietnamese • Vilamovian • Võrro • Welsh • Xhosa • Yiddish • Zazaki
`ShippingAddress__c`	**Type** string **Properties** Filter, Nillable, Sort **Description** The compound form of the shipping address. Based on these address fields: `Account.ShippingStreet`, `Account.ShippingCity`, `Account.ShippingState`, `Account.ShippingPostalCode`, and `Account.ShippingCountry`.
`SourceSystemId__c`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies this individual in an external data source.
`TaxBracket__c`	**Type** picklist

Field Name	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** Rate at which this individual is taxed. Valid values: • 10% • 15% • 25% • 28% • 33% • 35%
`TaxId__c`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Tax Identification Number or Social Security number.
`Twitter__c`	**Type** url **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Twitter profile URL.
`WeddingAnniversary__c`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date of wedding anniversary.

FinServ_ContactContactRelation__c

Represents the relationship between any two individuals.

Supported Calls

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

Fields

Note: To avoid DML errors on insert, read-only access at minimum is required for all fields that have a default value.

Field	Details
`Active__c`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the relationship is active (`true`) or not (`false`). The default value is `true`.
`Contact__c`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Contact that `RelatedContact__c` is related from.
`CurrencyIsoCode`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** If multiple currencies is enabled, contains the currency ISO code associated with the record.
`EndDate__c`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date when the relationship ended.
`ExternalId__c`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies the relationship in an external data source.
`InverseRelationship__c`	**Type** reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** Uniquely identifies the relationship between `Contact` and `RelatedContact__c` so that it can be referenced by a trigger that creates the inverse relationship record.
`Name`	**Type** string **Properties** Defaulted on create, Filter, idLookup, Sort **Description** Auto-number identifier for the relationship. Label is `Contact Relation Name`.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the user who created the relationship record.
`RelatedContact__c`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Contact that `Contact__c` is related to.
`Role__c`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** Role that describes how `RelatedContact__c` is related to `Contact__c`
`SourceSystemId__c`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies the relationship in an external data source.

Field	Details
StartDate__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date when the relationship started.

FinServ_Education__c

Represents an individual's educational background.

Supported Calls

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

Fields

Field	Details
Contact__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The individual's contact record.
EducationLevel__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Level of education. Valid values: • Declined to Comment • Graduate • High School • Post Graduate
GraduationDate__c	**Type** date

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** Date of graduation from the corresponding education level.
`Institution__c`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Name of the educational institution that awarded the degree.
`SourceSystemId__c`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies the individual in an external data source.

FinServ_Employment__c

Represents information about an individual's employment history.

Supported Calls

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

Fields

Field	Details
`AnnualIncome__c`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Gross annual income as reported on the most recent tax return.

Field	Details
`Contact__c`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The individual's contact record.
`EmployerAddress__c`	**Type** textarea **Properties** Create, Nillable, Update **Description** Address of the individual's employer.
`EmployerPhoneNumber__c`	**Type** phone **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Phone number of the employer.
`EmploymentStatus__c`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Nillable, Sort, Update **Description** Employment status. Valid values: • Employed • Self-Employed • Homemaker • Retired • Student • Unemployed with Income • Unemployed Without Income
`EndDate__c`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** End date at former employer.

Field	Details
LengthOfEmployment__c	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Length of employment in years (to two decimal places).
Occupation__c	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Nillable, Sort, Update **Description** Job category. Valid values: • Architecture and Engineering • Arts, Design, Entertainment, Sports, and Media • Building and Grounds Cleaning or Maintenance • Community and Social Service • Computer and Mathematical • Construction and Extraction • Education, Training, and Library • Farming, Fishing, and Forestry • Food Preparation and Serving • Healthcare Practitioners and Technical • Healthcare Support • Installation, Maintenance, and Repair • Legal • Life, Physical, and Social Science • Management • Office Admin • Other • Personal Care and Service • Production • Protective Service • Sales • Transportation and Material Moving
Position__c	**Type** string

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** Job title.
SourceSystemId__c	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies the individual in an external data source.
StartDate__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date the individual began working for current employer.

Event Custom Fields

Represents an event associated with a client. Custom fields extend the standard Event object for use in Financial Services Cloud.

Fields

Field Name	Details
Expectations__c	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Client expectations that this event relates to.
Household__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the household associated with the client.

Field Name	Details
`NextSteps__c`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Next steps for this client event.
`Objectives__c`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Client objectives that this event relates to.
`Regarding__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The nature of the most recent interaction. Valid values: • Prospecting • Onboarding • Client Retention • Service

FinServ_FinancialAccountRole__c

Represents the role occupied by a person or organizational entity that is involved with a financial account, such as a beneficiary or trustee.

Supported Calls

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

Fields

Field	Details
`Active__c`	**Type** boolean

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the organizational entity or person currently occupies this role (`true`) or not (`false`).
`CurrencyIsoCode`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** If multiple currencies is enabled, contains the currency ISO code associated with the record.
`Editable__c`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether this field is editable (`true`) or not (`false`).
`EndDate__c`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** End date when the organizational entity or person relinquished this role.
`FinancialAccount__c`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** Financial account that this role is related to.
`Name`	**Type** string **Properties** Defaulted on create, Filter, idLookup, Sort **Description** Name of the financial account role.

Field	Details
`RecordTypeId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the record type associated with this financial account role.
`RelatedAccount__c`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Name of the organizational entity that is involved with the financial account.
`RelatedContact__c`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Name of the person who is involved with the financial account.
`Role__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Role that describes how the organizational entity or person is involved with the financial account. Don't manually update the role to either primary owner or secondary owner, because these roles are automatically assigned based on the primary owner and joint owner of the corresponding financial account record. Valid values: When the record type is set to Account Role: • Accountant • Additional Owner • Administrator • Advisor • Annuitant • Appoint / Remove Authority • Authorized Agent

Field	Details
	• Authorized Agent / Beneficial Owner • Authorized Individual • Authorized Signer • Beneficiary • Business Manager • Committee Member • Conservator • Control Person • Corporation • Custodian • Deceased Grantor • Decedent • Discretionary • Foundation • Full Authority • Grantor • Guardian • Insured • Interested Party • Minor Primary Owner • Original Depositor • Other • Power of Attorney • Proprietor • TOD Beneficiary • Trustee • Primary Owner • Joint Owner When the record type is set to Contact Role: • Accountant • Beneficial Owner • Beneficiary • Business Manager • Grantor • Trustee
`SourceSystemId__c`	**Type** string

Field	Details
	Properties Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies the role in an external data source.
`StartDate__c`	**Type** date **Properties** Create, Defaulted on create, Filter, Group, Nillable, Sort, Update **Description** Start date when the organizational entity or person assumed this role. The default value is the current date.

FinServ_FinancialAccount__c

Represents a financial account such as an investment account, bank account, or insurance policy.

Supported Calls

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

Fields

Field	Details
`AccrualFrequency__c`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The frequency the interest is accrued on the financial account. Possible values are: • `Annual` • `Daily` • `Monthly` • `Quarterly` The default value is `Daily`.

Field	Details
AccruedInterest__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The interest accrued on the financial account in the current statement period.
Address1__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Street address line 1 for mailing address.
Address2__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Street address line 2 for mailing address.
ApplicationDate__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date when this individual submitted the financial account application.
APY__c	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** Annual percentage yield. (Can be fractional.)
AssetRebalance__c	**Type** boolean **Properties** Create, Defaulted on create, Filter, Sort, Update

Field	Details
	Description Indicates whether automatic portfolio rebalancing applies to this financial account (`true`) or not (`false`).
`AvailableCredit__c`	**Type** currency **Properties** Create, , Filter, Nillable, Sort, Update **Description** Total current available credit for this financial account.
`AverageBalance__c`	**Type** currency **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update **Description** Average amount of money in the financial account, over a time period.
`Balance__c`	**Type** currency **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update **Description** Amount of money in the financial account.
`BalanceLastStatement__c`	**Type** currency **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update **Description** Account balance posted on last statement.
`BookedDate__c`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date charge or credit booked to account.
`BranchCode__c`	**Type** string

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The branch code of the financial account.
`BranchName__c`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The branch name of the financial account.
`CashBalance__c`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Cash available in the financial account.
`CashLimit__c`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Maximum cash withdrawal or advance amount.
`City__c`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** City for mailing address.
`CloseDate__c`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date when this financial account was closed.
`CollateralDesc__c`	**Type** string

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** Description of collateral provided for loan.
`Country__c`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Country for mailing address.
`CurrencyIsoCode`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** If multiple currencies is enabled, contains the currency ISO code associated with the record.
`CurrentPostedBalance__c`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Current posted balance in account.
`DailyWithdrawalLimit__c`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Amount that can be withdrawn in one day.
`Description__c`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Description of the financial account.

Field	Details
`Discretionary__c`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the advisor has discretionary trading authority for this financial account (`true`) or not (`false`).
`DrawPeriodMonths__c`	**Type** double **Properties** CreateFilter, Nillable, SortUpdate **Description** Number of months an individual can withdraw funds from a credit account.
`EscrowBalance__c`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Current balance in escrow account.
`ExpectedCloseDate__c`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Expected date when the debit account or loan closes.
`FinancialAccountChargesAndFees__c`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Reference to Charges and Fees record for the account.
`FinancialAccountNumber__c`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update

Field	Details
	Description ID that uniquely identifies the financial account in an external data source. Label is `Account Number`.
`FinancialAccountSource__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Data source. Label is `Source`. Valid values: • Integrator • Manual Entry • Pending
`FinancialAccountType__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Type of financial account. Label is `Type`. Valid values: • 401(a) • 401(k) • 403(b) • 529 Plan • Brokerage • Cash Management Account • CD • Checking • Credit Card • Discount Brokerage • Fixed Annuity • Individual Life • IRA • Mutual Fund • Profit Sharing • Rollover IRA • Roth IRA • Savings • Term Life

Field	Details
	• Variable Life • Whole Life
`HardwareSerial__c`	**Type** string **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The serial number of hardware associated with the account.
`HeldAway__c`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether this financial account is managed or administered externally (`true`) or in-house (`false`).
`HoldingCount__c`	**Type** double **Properties** Filter, Nillable, Sort **Description** Number of holdings within this financial account. Calculated by roll-up summary. Label is `Number of Holdings`.
`Household__c`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Household that this financial account rolls up to.
`IncomingVolume__c`	**Type** double **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The volume of transactions coming in through the service.
`InsurancePaidYearToDate__c`	**Type** currency

Field	Details
	Properties Create, Filter, Nillable, Sort, Update **Description** The total amount of insurance paid in the current tax year.
`InsuredAmount__c`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The insured value that an insurance policy covers.
`InterestBalance__c`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The interest balance on the financial account.
`InterestPaidYearToDate__c`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The total amount of interest paid in the current tax year.
`InsurancePolicy__c`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The insurance policy associated with this financial account.
`InterestRate__c`	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** Interest rate as a percent.
`InvestmentObjectives__c`	**Type** multipicklist

Field	Details
	Properties Create, Filter, Nillable, Update **Description** Purpose of this financial account. Valid values: • Safety • Income • Growth • Tax Optimization • Liquidity
`JointOwner__c`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Joint owner of this financial account.
`LastActivityDate`	**Type** date **Properties** Filter, Group, Nillable, Sort **Description** Timestamp for when this financial account last had a task or event action associated with the record.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Timestamp for when the current user last viewed a record related to this record.
`LastTransactionDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Timestamp for the last transaction on the account.
`LastUpdated__c`	**Type** date

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** Timestamp for when data for the financial account was last updated by an external data source.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Timestamp for when the current user last viewed this record.
LienHolder__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Name of lien holder on the financial account.
LoanAmount__c	**Type** currency **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update **Description** Amount of the loan.
LoanEndDate	**Type** date **Properties** Filter, Group, Nillable, Sort **Description** End date for the loan.
LoanTermMonths__c	**Type** double **Properties** CreateFilter, Nillable, SortUpdate **Description** Loan term in months.

Field	Details
`Managed__c`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether this financial account is managed or administered (`true`), or not (`false`).
`MinimumBalance__c`	**Type** currency **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update **Description** Minimum balance requirement for this financial account.
`MinimumPayment__c`	**Type** currency **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update **Description** Minimum monthly payment on account.
`ModelPortfolio__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Model asset allocation for the financial account. Valid values: • Conservative • Moderate • Balanced • Growth • Aggressive
`Name`	**Type** string **Properties** Create, Defaulted on create, Filter, Group, idLookup, Nillable, Sort, Update **Description** Name of the financial account.

Field	Details
NickName__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Nickname of the financial account.
OpenDate__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date when the financial account was opened.
OutgoingVolume__c	**Type** double **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The volume of transactions going out through the service.
OverDraftAllowed__c	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the financial account allows an overdraft (`true`) or not (`false`).
OverDraftLinkedAccount__c	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** Reference to the linked overdraft account.
OverdraftProtection__c	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	Description Indicates whether the customer accepts overdraft protection and its associated fees.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the user who created the financial account record.
`Ownership__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Type of ownership for the account. Valid values: • Individual • Joint • Trust
`OwnerType__c`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Individual's ownership role (primary or joint) for the account.
`PaperlessDelivery__c`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Account owner elects to receive electronic delivery of financial account documents (`true`) or not (`false`).
`PaymentAmount__c`	**Type** currency **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update

Field	Details
	Description Minimum monthly payment on account.
PaymentDueDate__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date when payment due on the account.
PaymentFrequency__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Frequency of payments on the account. Valid values: • Weekly • Biweekly • Monthly • Quarterly • Semiannually • Annually
PendingDeposits__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Deposits pending on the account.
PendingWithdrawals__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** WIthdrawals pending on the account.
Performance1Yr__c	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description Performance measured over the past year.
`Performance3Yr__c`	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** Performance measured over the past three years.
`PerformanceMTD__c`	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** Performance measured over the past month-to-date.
`PerformanceQTD__c`	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** Performance measured over the past quarter-to-date.
`PerformanceYTD__c`	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** Performance measured over the past calendar year-to-date.
`PolicyTerm__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The period of coverage provided by the policy.
`PostalCode__c`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Postal code for mailing address.
`Premium__c`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Amount paid to the insurer for insurance policy coverage.
`PrimaryBankerIdentifier__c`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The unique identifier of the primary banker who manages the financial account.
`PrimaryBankerName__c`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the primary banker who manages the financial account.
`PrimaryOwner__c`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Primary owner of the financial account.
`PrincipalBalance__c`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Principal balance on the loan account.
`PrincipalPaidYearToDate__c`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description The total amount paid against the principal in the current tax year.
`ProductName__c`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Policy product name.
`PropTaxPaidYearToDate__c`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The total amount of property tax paid in the current tax year.
`RebalanceFrequency__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Frequency of portfolio rebalancing for this financial account. Valid values: • Monthly • Quarterly • Semiannually • Annually
`RecordTypeId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the record type associated with this financial account.
`RecordTypeName__c`	**Type** string **Properties** Filter, Nillable, Sort

Field	Details
	Description Record type for this financial account. The value is copied from `RecordType.Name` and can't be changed. Label is `Record Type`.
`RenewalDate__c`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date when insurance policy renewal is due.
`RepaymentPeriodMonths__c`	**Type** double **Properties** CreateFilter, Nillable, SortUpdate **Description** Repayment period in months.
`RoutingNumber__c`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Bank routing number.
`SecondaryBankerIdentifier__c`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The unique identifier of the secondary banker who manages the financial account.
`SecondaryBankerName__c`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the secondary banker who manages the financial account.
`ServiceProvider__c`	**Type** string

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** Custodian or recordkeeper of this financial account.
`ServiceType__c`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The type of service undertaken.
`SourceSystemId__c`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies the financial account in an external data source.
`State__c`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** State for mailing address.
`StatementFrequency__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Frequency statements are issued. Valid values: • Monthly • Biweekly • Quarterly • Annually
`Status__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Status of this financial account. Valid values: • Open • Closed • On Hold • Pending
TargetLimit__c	**Type** double **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The limit on items or value that the service processes.
TaxID__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Tax Identification Number associated with this financial account.
TaxStatus__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Type of tax treatment this financial account qualifies for. Valid values: • Nonqualified • Qualified
TermDepositMaturityDate__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date a fixed term deposit matures.
TimeHorizon__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Investment time frame for this financial account. Valid values: • Long Term • Medium Term • Short Term
`TotalCreditLimit__c`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Total credit limit.
`TotalHoldAmountAsOfDate__c`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date the total hold amount is relevant.
`TotalHoldAmount__c`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The total hold amount on the financial account.
`Type__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Type of account. Valid values: • Brokerage • Discount Brokerage • CD • Checking • Cash Management Account • Credit Card • Savings

Field	Details
	• Mutual Fund, Fixed Annuity • Variable Annuity • Managed Account • Individual Life • Term Life • Variable Life • Whole Life

FinServ_FinancialAccountTransaction__c

Represents information about a single financial account transaction.

Supported Calls

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

Fields

Field	Details
`AllocatedEscrowPayment__c`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The amount of the payment that's allocated towards escrow.
`AllocatedFeeAmount__c`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The amount of the payment that's allocated towards fees.
`AllocatedInterestAmount__c`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description The amount of the payment that's allocated towards the interest.
AllocatedPrincipalAmount__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The amount of the payment that's allocated towards the principal.
Amount__c	**Type** currency **Properties** Create, Filter, Sort, Update **Description** Amount of the transaction.
BillingStatement__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Billing statement record associated with the account.
CardAccountID__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Card number linked to the transaction.
Claim__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The claim associated with the financial account transaction.
Description__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Description of the transaction.
DisputeReason__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Reason for the dispute. Possible values are: • Duplicate Transactions • Others • Suspected Fraud • Transaction not recognized
EscrowBalance__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The balance on the escrow amount of the financial account.
FinancialAccount__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Financial account to which the transaction pertains.
InsurancePolicy__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The insurance policy associated with the financial account transaction.
MerchantCategoryCode__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Merchant category code.
PostDate__c	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** Date the transaction posted to the account.
PrincipalBalance__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The balance on the principal amount of the financial account.
RunningBalance__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Running balance for the transaction.
SourceSystemId__c	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** Record ID from an external data source.
SourceTransactionType__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Source transaction type from an external data source.
TransactionDate__c	**Type** dateTime **Properties** Create, Filter, Sort, Update

Field	Details
	Description Date of the transaction.
`TransactionId__c`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID that uniquely identifies the transaction in an external data source.
`TransactionStatus__c`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Nillable, Sort, Update **Description** Status of the transaction. • Pending • Posted
`TransactionType__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Type of transaction. • Credit • Debit

FinServ_FinancialGoal__c

This Financial Goal object is installed in your Financial Services Cloud Salesforce org when you install the Financial Services Cloud Managed Package. It represents a client's financial goal, such as college funds or a major purchase.

Supported Calls

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

Fields

Field	Details
ActualValue__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Current amount saved toward goal.
CompletionDate__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date when the goal was reached.
CurrencyIsoCode	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** If multiple currencies is enabled, contains the currency ISO code associated with the record.
Description__c	**Type** textarea **Properties** Create, Nillable, Update **Description** Description of the goal.
Household__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Household that this goal is associated with.
InitialValue__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description Starting amount saved toward goal.
LastActivityDate	**Type** date **Properties** Filter, Group, Nillable, Sort **Description** Timestamp for when this goal last had a task or event action associated with the record.
LastReferencedDate	**Type** date **Properties** Filter, Nillable, Sort, **Description** Timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Timestamp for when the current user last viewed this record.
Name	**Type** string **Properties** Create, Defaulted on create, Filter, Group, idLookup, Nillable, Sort, Update **Description** Name of this goal.
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the user who created the financial goal record.
PrimaryOwner__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Primary owner of this goal.
SourceSystemId__c	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies the goal in an external data source.
Status__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Status of goal. Valid values: • Completed • In Progress • Not Started
TargetDate__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date when the goal is expected to be reached.
TargetValue__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Amount required for the goal.
Type__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Purpose of goal. Valid values: • Education

Field	Details
	• Home Purchase • Other • Retirement

FinServ_FinancialHolding__c

Represents a financial holding in an investment account, such as shares of stock.

Supported Calls

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

Fields

Field	Details
`AssetCategory__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Subcategory of asset type. Valid values: • U.S. Equity • Sector Equity • Allocation • International Equity • Alternative • Commodities • Taxable Bond • Municipal Bond
`AssetCategoryName__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Market capitalization and investing style. Valid values: • Large Growth

Field	Details
	• Large Value • Large Blend • Small Growth • Small Value • Small Blend • Mid-Cap Growth • Mid-Cap Value • Mid-Cap Blend
AssetClass__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Major category of asset type. Valid values: • Equities • Fixed Income • Cash Equivalents • Alternative Investments
CurrencyIsoCode	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** If multiple currencies is enabled, contains the currency ISO code associated with the record.
FinancialAccount__c	**Type** reference **Properties** Create, Filter, Group, Sort **Description** Financial account that this holding is related to.
GainLoss__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Change in value since purchase.

Field	Details
Household__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Household that this holding rolls up to.
LastActivityDate	**Type** date **Properties** Filter, Group, Nillable, Sort **Description** Timestamp for when this financial holding last had a task or event action associated with the record.
LastReferencedDate	**Type** date **Properties** Filter, Nillable, Sort, **Description** Timestamp for when the current user last viewed a record related to this record.
LastUpdated__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Timestamp for when data for this holding was last updated by an external data source.
LastViewedDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Timestamp for when the current user last viewed this record.
MarketValue__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description Current market value.
Name	**Type** string **Properties** Create, Defaulted on create, Filter, Group, idLookup, Nillable, Sort, Update **Description** Name of this holding.
PercentChange__c	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** Percent change in value since purchase.
Price__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Current price per share.
PrimaryOwner__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Primary owner of this holding.
PurchasePrice__c	**Type** currency **Properties** Create, Filter, Sort, Update **Description** Price per-share at time of purchase.
Securities__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Name of the securities held. Label is `Symbol`.
`Shares__c`	**Type** double **Properties** Create, Filter, Sort, Update **Description** Number of shares held.
`SourceSystemId__c`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies the holding in an external data source.
`Symbol__c`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Ticker symbol for the securities held. The value is copied from `Securities__c` and can't be changed.

FinServ_IdentificationDocument__c

Represents information about documents used to verify an individual's identity.

Supported Calls

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

Fields

Field	Details
`Account__c`	**Type** reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The account associated with the identification document.
DocumentNumber__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Number listed on the identification document.
DocumentType__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Type of document used to verify the person's identity. Valid values: • Green Card • License • Other • Passport • Visa
ExpirationDate__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date the document expires.
IssueDate__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date the document was issued.
IssuingCountry__c	**Type** picklist

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The country in which the document was issued. Valid values: • Afghanistan • Aland Islands • Albania • Algeria • Andorra • Angola • Anguilla • Antarctica • Antigua and Barbuda • Argentina • Armenia • Aruba • Australia • Austria • Azerbaijan • Bahamas • Bahrain • Bangladesh • Barbados • Belarus • Belgium • Belize • Benin • Bermuda • Bhutan • Bolivia, Plurinational State of • Bonaire, Sint Eustatius and Saba • Bosnia and Herzegovina • Botswana • Bouvet Island • Brazil • British Indian Ocean Territory • Brunei Darussalam • Bulgaria

Field	Details
	• Burkina Faso • Burundi • Cambodia • Cameroon • Canada • Cape Verde • Cayman Islands • Central African Republic • Chad • Chile • China • Christmas Island • Cocos (Keeling) Islands • Colombia • Comoros • Congo • Congo, the Democratic Republic of the • Cook Islands • Costa Rica • Cote d'Ivoire • Croatia • Cuba • Curaçao • Cyprus • Czech Republic • Denmark • Djibouti • Dominica • Dominican Republic • Ecuador • Egypt • El Salvador • Equatorial Guinea • Eritrea • Estonia • Ethiopia • Falkland Islands (Malvinas) • Faroe Islands

Field	Details
	• Fiji • Finland • France • French Guiana • French Polynesia • French Southern Territories • Gabon • Gambia • Georgia • Germany • Ghana • Gibraltar • Greece • Greenland • Grenada • Guadeloupe • Guatemala • Guernsey • Guinea • Guinea-Bissau • Guyana • Haiti • Heard Island and McDonald Islands • Holy See (Vatican City State) • Honduras • Hungary • Iceland • India • Indonesia • Iran, Islamic Republic of • Iraq • Ireland • Isle of Man • Israel • Italy • Jamaica • Japan • Jersey

Field	Details
	• Jordan • Kazakhstan • Kenya • Kiribati • Korea, Democratic People's Republic of • Korea, Republic of • Kuwait • Kyrgyzstan • Lao People's Democratic Republic • Latvia • Lebanon • Lesotho • Liberia • Libyan Arab Jamahiriya • Liechtenstein • Lithuania • Luxembourg • Macao • Macedonia, the former Yugoslav Republic of • Madagascar • Malawi • Malaysia • Maldives • Mali • Malta • Martinique • Mauritania • Mauritius • Mayotte • Mexico • Moldova, Republic of • Monaco • Mongolia • Montenegro • Montserrat • Morocco • Mozambique • Myanmar

Field	Details
	• Namibia • Nauru • Nepal • Netherlands • New Caledonia • New Zealand • Nicaragua • Niger • Nigeria • Niue • Norfolk Island • Norway • Oman • Pakistan • Palestine • Panama • Papua New Guinea • Paraguay • Peru • Philippines • Pitcairn • Poland • Portugal • Qatar • Reunion • Romania • Russian Federation • Rwanda • Saint Barthélemy • Saint Helena, Ascension and Tristan da Cunha • Saint Kitts and Nevis • Saint Lucia • Saint Martin (French part) • Saint Pierre and Miquelon • Saint Vincent and the Grenadines • Samoa • San Marino • Sao Tome and Principe

Field	Details
	• Saudi Arabia • Senegal • Serbia • Seychelles • Sierra Leone • Singapore • Sint Maarten (Dutch part) • Slovakia • Slovenia • Solomon Islands • Somalia • South Africa • South Georgia and the South Sandwich Islands • South Sudan • Spain • Sri Lanka • Sudan • Suriname • Svalbard and Jan Mayen • Swaziland • Sweden • Switzerland • Syrian Arab Republic • Taiwan • Tajikistan • Tanzania, United Republic of • Thailand • Timor-Leste • Togo • Tokelau • Tonga • Trinidad and Tobago • Tunisia • Turkey • Turkmenistan • Turks and Caicos Islands • Tuvalu • Uganda

Field	Details
	• Ukraine • United Arab Emirates • United Kingdom • United States • Uruguay • Uzbekistan • Vanuatu • Venezuela, Bolivarian Republic of • Vietnam • Virgin Islands, British • Wallis and Futuna • Western Sahara • Yemen • Zambia • Zimbabwe
`SourceSystemId__c`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies the financial account in an external data source.
`VerifiedBy__c`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Name of the person who verified the document.
`VerifiedOn__c`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** Date the identification document was verified.

FinServ Lead Custom Fields

Represents a lead associated with an individual. Custom fields extend the Lead object for use in Financial Services Cloud.

Fields

Field Name	Details
`CreatedByMe__c`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the current user created the contact record.
`CreatedFromLead__c`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether a contact converted from this lead sets the value of `Contact.CreatedFromLead__c` as (`true`) or not (`false`).
`Employer__c`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The lead's employer information that converts to the individual's contact record upon lead conversion.
`ExpressedInterest__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Lead's expressed area of interest. Label is `Category`. Valid values: • Mortgage • Personal Loan • Credit Card • Savings Account • Checking Account

Field Name	Details
	• HELOC • Day to Day Banking • Manage Money • Property Purchase • Investments • Education • Manage Debt
`Household__c`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the household record associated with the lead record.
`PotentialValue__c`	**Type** currency **Properties** Filter, Nillable, Sort **Description** Potential value from converting the lead.
`ProductInterest__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Lead's area of interest. This field is deprecated. Use the `ExpressedInterest__c` field instead.
`ReferredByContact__c`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** External contact who made the referral.
`ReferredByUser__c`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update

Field Name	Details
	Description Internal Salesforce user who made the referral.
`ReferrerScore__c`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** A value of 0 to 100. A high score reflects a high rate of referral conversion.
`RelatedAccount__c`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Individual or household account related to a lead.

FinServ_LifeEvent__c

Represents a client's life event, such as a birth or marriage.

Supported Calls

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

Fields

Field	Details
`Client__c`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Individual the life event is related to.
`CurrencyIsoCode`	**Type** picklist

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** If multiple currencies is enabled, contains the currency ISO code associated with the record.
DiscussionNote__c	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Notes from past discussions.
EventDate__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date of the life event.
EventType__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Type of life event. Valid values: • College • New Baby • New Business • New Home • New Job • Retirement
FinancialGoal__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Financial goal that the life event is related to.
GoalType__c	**Type** picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** Type of financial goal implied by the life event. Valid values: • Saving for College • Saving for Retirement
SourceSystemId__c	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies the goal in an external data source.

FinServ Opportunity Custom Fields

Represents an opportunity associated with an individual. Custom fields extend the Opportunity object for use in Financial Services Cloud.

Fields

Field Name	Details
FinancialAccount__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Financial account associated with this opportunity.
ReferredByContact__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** External contact referring this opportunity.
ReferredByUser__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update

Field Name	Details
	Description Internal user referring this opportunity.

FinServ_PolicyPaymentMethod__c

Represents the premium payment method for a policy, such as credit card, debit card, or internet banking. This object is available in API version 47.0 and later.

Supported Calls

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

Fields

Field	Details
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** An auto-generated number assigned to this record.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the record owner.
`EndDate__c`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date on which the financial account was removed as the active payment method.
`FinancialAccount__c`	**Type** reference

Field	Details
	Properties Create, Filter, Group, Sort, Update **Description** The financial account that is used to make any payments for the policy. For example, debit card, credit card, bank account.
`InsurancePolicy__c`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The policy for which this payment setup is done.
`IsActive__c`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether this financial account and its billing configuration are active.
`IsPrimaryAccount__c`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the financial account is the primary billing account for the policy.
`PaymentPercentage__c`	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** The percentage of the total bill amount that is charged to this financial account.
`StartDate__c`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date on which the financial account was added as an active payment method.

FinServ_ReciprocalRole__c

Represents the other entity's corresponding role in a one-to-one relationship between entities.

Supported Calls

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

Fields

Field	Details
`CreateInverseRole__c`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the corresponding reciprocal role record is created automatically for the inverse role (`true`) or not (`false`).
`CurrencyIsoCode`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** If multiple currencies is enabled, contains the currency ISO code associated with the record.
`InverseRelationship__c`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Uniquely identifies the relationship between `Role` and `InverseRole__c` so that it can be referenced by a trigger that creates the inverse relationship record.
`InverseRole__c`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The role that the other entity occupies in the relationship, such as a grandparent to a grandchild, or an owned business to a proprietor.

Field	Details
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Timestamp for when the current user last viewed this record.
Name	**Type** string **Properties** Create, Defaulted on create, Filter, Group, idLookup, Nillable, Sort, Update **Description** Name of this reciprocal role.
OwnerId	**Type** reference **Properties** Create, Defaulted on createFilter, Group, Sort, Update **Description** ID of the user who created the reciprocal role record.
RecordTypeId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the record type associated with this reciprocal role.
RelationshipType__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Type of entities involved in the relationship. Valid values:

Field	Details
	• All • Contact Contact Relation • Account Account Relation
`SourceSystemId__c`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies the reciprocal role in an external data source.

FinServ_Revenue__c

Represents data from Financial Services Cloud and external systems to aggregate revenue streams for an advisor's book of business.

Supported Calls

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

Fields

Field	Details
`Account__c`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Account that `Revenue__c` is related from. This field or `FinancialAccount__c` requires an entry but not both.
`Amount__c`	**Type** currency **Properties** Create, Filter Sort, Update **Description** Revenue amount.
`Date__c`	**Type** date

Field	Details
	Properties Create, Filter, Group, Sort, Update **Description** Date when this revenue was made.
`FinancialAccount__c`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Financial Account that `Revenue__c` is related from. This field or `Account__c` requires an entry but not both.
`SourceSystemId__c`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** A value that uniquely identifies the revenue in an external data source.
`SubType__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The subtype of revenues. Valid values: Transaction, Advisory, Investment, Custodian, Planning.
`Type__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of revenues. Valid values: Fees, Commission.

FinServ_Securities__c

Represents a security, such as a stock or bond.

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** If multiple currencies is enabled, contains the currency ISO code associated with the record.
`CUSIP__c`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Committee on Uniform Securities Identification Procedures identification number for the securities.
`Exchange__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Exchange on which the securities are traded. Valid values: • NYSE • NASDAQ
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Timestamp for when the current user last viewed a record related to this record.
`LastUpdated__c`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Timestamp for when data for the securities was last updated by an external data source.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Timestamp for when the current user last viewed this record.
`Name`	**Type** string **Properties** Create, Defaulted on create, Filter, Group, idLookup, Nillable, Sort, Update **Description** Name of the securities. Label is `Symbol`.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the user who created the securities record.
`Price__c`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Current price of the securities.
`SecuritiesName__c`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Name that uniquely identifies the securities.
`SecurityId__c`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description ID of the securities.
`SourceSystemId__c`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies the securities in an external data source.

FinServ SvcCatalogRequest Custom Fields

Represents a request made by a user using the Service Catalog. The CaseId custom field extends the SvcCatalogRequest object for use in Financial Services Cloud.

Fields

Field	Details
`CaseId__c`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The case associated with a service process request. This field is available in API version 57.0 and later. This field is a relationship field. **Relationship Name** Case **Relationship Type** Lookup **Refers To** Case

FinServ Task Custom Fields

Represents a task associated with a client. Custom fields extend the standard Task object for use in Financial Services Cloud.

Fields

Field Name	Details
`Expectations__c`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Expectations that this task relates to.
`Household__c`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the household associated with the individual.
`NextSteps__c`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Next steps for this task.
`Objectives__c`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Objectives that this task relates to.
`Regarding__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The nature of this task. Valid values: • Prospecting • Onboarding • Client Retention • Service

FinServ User Custom Fields

Represents a user in your organization. Custom fields extend the standard User object for use in Financial Services Cloud.

Represents a user in your organization.

Supported Calls

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

Fields

Field	Details
`ReferrerScore__c`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** A value of 0 to 100. A high score reflects a high rate of referral conversion.

FINANCIAL SERVICES CLOUD ASSOCIATED OBJECTS

This section and its subtopics provide a list of associated objects and their standard fields.

Each Financial Services Cloud object has different associated objects. For example, the Claim object has the associated objects ClaimFeed, ClaimHistory, ClaimOwnerSharingRule, and ClaimShare, but there's no ClaimChangeEvent object.

Some fields aren't listed for some objects. To see the system fields for each object, see System Fields in the *Object Reference for Salesforce and Lightning Platform*.

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

*StandardObjectName*ChangeEvent

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

Supported Calls

`describeSObjects()`

Special Access Rules

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

Change Event Support

Change events are available for all custom objects and a subset of standard objects. Change events that correspond to custom settings are partially supported. They aren't supported in Apex triggers but are supported in other types of subscribers.

Change Event Name

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

Standard Object Change Event Name

```
<Standard_Object_Name>ChangeEvent
```

Example: `AccountChangeEvent`

Custom Object Change Event Name

```
<Custom_Object_Name>__ChangeEvent
```

Example: `MyCustomObject__ChangeEvent`

Change Event Fields

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

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

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

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

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

Event Message Example

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

```
{
  "schema": "IeRuaY6cbI_HsV8Rv1Mc5g",
  "payload": {
    "ChangeEventHeader": {
      "entityName": "Account",
      "recordIds": [
        "<record_ID>"
      ],
      "changeType": "CREATE",
      "changeOrigin": "com/salesforce/api/soap/51.0;client=SfdcInternalAPI/",
      "transactionKey": "0002343d-9d90-e395-ed20-cf416ba652ad",
      "sequenceNumber": 1,
      "commitTimestamp": 1612912679000,
      "commitNumber": 10716283339728,
      "commitUser": "<User_ID>"
    },
    "Name": "Acme",
    "Description": "Everyone is talking about the cloud. But what does it mean?",
    "OwnerId": "<Owner_ID>",
    "CreatedDate": "2021-02-09T23:17:59Z",
    "CreatedById": "<User_ID>",
    "LastModifiedDate": "2021-02-09T23:17:59Z",
    "LastModifiedById": "<User_ID>"
  },
  "event": {
    "replayId": 6
  }
}
```

API Version and Schema

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

Usage

For more information about Change Data Capture, see Change Data Capture Developer Guide.

Objects That Support Change Events

The following object has associated ChangeEvent objects.

- AccountParticipant
- AppFormProdtPrpsAttribute
- AppFormProductParticipant
- ApplicationActionItem
- ApplicationForm
- ApplicationFormParticipant
- ApplicationFormProduct
- ApplicationFormProductFee
- ApplicationFormSellerItem
- AuthorizationFormConsent
- Award
- Banker
- BranchUnit
- BranchUnitBusinessMember
- BranchUnitCustomer
- BranchUnitRelatedRecord
- BrokerOfRecord
- BusinessLicense
- ClaimCase
- Claim
- ClaimCovPaymentAdjustment
- ClaimCovReserveAdjustment
- ClaimCoverage
- ClaimCoveragePaymentDetail
- ClaimCoverageReserveDetail
- ClaimItem
- ClaimParticipant
- ClaimPaymentSummary
- ClaimPayoutPlan
- ClaimRecovery

- CommissionStatement
- CommissionStatementLineItem
- ContractGroupPlan
- ContractGroupPlanGroupClass
- CustomObjectParticipant
- FinancialGoal
- FinancialGoalFunding
- FinancialGoalParty
- FinancialPlan
- FinancialSecurity
- FinAssetPortfolioTgtAlloc
- GroupCensus
- GroupCensusMember
- GroupCensusMemberPlan
- GroupClass
- GroupClassContribution
- IdentityDocument
- IndexRate
- InfoAuthorizationRequest
- InsBnftEligDefinition
- InsContributionPlnGroupCls
- InsContributionPlnLineItem
- InsPolicyBenefitEligibility
- InsPolicyCoverageBenefit
- InsPolicyCoverageNetwork
- InsuranceContract
- InsuranceContributionPlan
- InsurancePolicy
- InsurancePolicyTeamMember
- InsuranceRatePlan
- InsuranceRatePlanCommission
- InsuranceRatePlanLineItem
- InteractionSummary
- MultipartyInfoAuthRequest
- OpportunityParticipant
- PartyCertifiedCapacity
- PartyFinancialAssetLien
- PartyScreeningSummary
- PartyProfileParticipant
- PaymentRequest

- PaymentRequestLine
- PersonLifeEvent
- ProducerRelationship
- ProducerSplitArngLineItem
- ProducerSplitArrangement
- ProducerSplitAssignment
- ProducerSplitRoleAssignment
- ProductFee
- ProductListRate
- QuoteLineItemGroupClass
- RelatedRecordAssocCriteria
- SecuritiesHolding
- TagCategory
- UserFinancialAuthority

*StandardObjectName*Feed

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

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

Supported Calls

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

Special Access Rules

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

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

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

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

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

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

Fields

Field	Details
`BestCommentId`	**Type** reference **Properties** Filter, Group, Nillable, Sort **Description** The ID of the comment marked as best answer on a question post.
`Body`	**Type** textarea **Properties** Nillable, Sort **Description** The body of the post. Required when `Type` is `TextPost`. Optional when `Type` is `ContentPost` or `LinkPost`.
`CommentCount`	**Type** int **Properties** Filter, Group, Sort **Description** The number of comments associated with this feed item.
`ConnectionId`	**Type** reference **Properties** Filter, Group, Nillable, Sort **Description** When a PartnerNetworkConnection modifies a record that is tracked, the `CreatedBy` field contains the ID of the system administrator. The `ConnectionId` contains the ID of the PartnerNetworkConnection. Available if Salesforce to Salesforce is enabled for your organization.
`InsertedById`	**Type** reference **Properties** Group, Nillable, Sort **Description** ID of the user who added this item to the feed. For example, if an application migrates posts and comments from another application into a feed, the `InsertedBy` value is set to the ID of the context user.

Field	Details
`isRichText`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort **Description** Indicates whether the feed item `Body` contains rich text. If you post a rich text feed comment using SOAP API, set `IsRichText` to `true` and escape HTML entities from the body. Otherwise, the post is rendered as plain text. Rich text supports the following HTML tags: • `<p>` Tip: Though the ` ` tag isn't supported, you can use `<p> </p>` to create lines. • `<a>` • `<b>` • `<code>` • `<i>` • `<u>` • `<s>` • `<ul>` • `<ol>` • `<li>` • `<img>` The `<img>` tag is accessible only through the API and must reference files in Salesforce similar to this example: `<img src="sfdc://069B0000000omjh"></img>` Note: In API version 35.0 and later, the system replaces special characters in rich text with escaped HTML. In API version 34.0 and prior, all rich text appears as a plain-text representation.
`LikeCount`	**Type** int **Properties** Filter, Group, Sort **Description** The number of likes associated with this feed item.
`LinkUrl`	**Type** url **Properties** Nillable, Sort

Field	Details
	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 **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

Field	Details
	Description The title of the feed item. When the `Type` is `LinkPost`, the `LinkUrl` is the URL and this field is the link name.
`Type`	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** The type of feed item. Values are: • `ActivityEvent`—indirectly generated event when a user or the API adds a Task associated with a feed-enabled parent record (excluding email tasks on cases). Also occurs when a user or the API adds or updates a Task or Event associated with a case record (excluding email and call logging). For a recurring Task with CaseFeed disabled, one event is generated for the series only. For a recurring Task with CaseFeed enabled, events are generated for the series and each occurrence. • `AdvancedTextPost`—created when a user posts a group announcement and, in Lightning Experience as of API version 39.0 and later, when a user shares a post. • `AnnouncementPost`—Not used. • `ApprovalPost`—generated when a user submits an approval. • `BasicTemplateFeedItem`—Not used. • `CanvasPost`—a post made by a canvas app posted on a feed. • `CollaborationGroupCreated`—generated when a user creates a public group. • `CollaborationGroupUnarchived`—Not used. • `ContentPost`—a post with an attached file. • `CreatedRecordEvent`—generated when a user creates a record from the publisher. • `DashboardComponentAlert`—generated when a dashboard metric or gauge exceeds a user-defined threshold. • `DashboardComponentSnapshot`—created when a user posts a dashboard snapshot on a feed. • `LinkPost`—a post with an attached URL. • `PollPost`—a poll posted on a feed. • `ProfileSkillPost`—generated when a skill is added to a user's Chatter profile. • `QuestionPost`—generated when a user posts a question. • `ReplyPost`—generated when Chatter Answers posts a reply. • `RypplePost`—generated when a user creates a Thanks badge in WDC. • `TextPost`—a direct text entry on a feed. • `TrackedChange`—a change or group of changes to a tracked field. • `UserStatus`—automatically generated when a user adds a post. Deprecated.

Field	Details
`Visibility`	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** Specifies whether this feed item is available to all users or internal users only. This field is available if Salesforce Communities are enabled for your organization. `Visibility` can have the following values: • `AllUsers`—The feed item is available to all users who have permission to see the feed item. • `InternalUsers`—The feed item is available to internal users only. Note the following exceptions for `Visibility`: • For record posts, `Visibility` is set to `InternalUsers` for all internal users by default. • External users can set `Visibility` only to `AllUsers`. • On user and group posts, only internal users can set `Visibility` to `InternalUsers`.

Usage

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

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

Objects That Follow This Model

These objects follow the standard pattern for associated feed objects.

- AppFormProductParticipantFeed
- ApplicationActionItemFeed
- ApplicationFormFeed
- ApplicationFormParticipantFeed
- ApplicationFormProductFeeFeed
- ApplicationFormProductProposalFeed
- ApplicationFormSellerItemFeed
- AuthFormRequestRecordFeed
- AuthorizationFormTextFeed
- AwardFeed

- BankerFeed
- BatchJobFeed
- BatchJobPartFailedRecordFeed
- BatchJobPartFeed
- BranchUnitFeed
- BranchUnitBusinessMemberFeed
- BranchUnitCustomerFeed
- BusinessLicenseFeed
- BusinessMilestoneFeed
- BusinessProfileFeed
- ClaimCaseFeed
- ClaimFeed
- ClaimItemFeed
- ClaimParticipantFeed
- ClaimPayoutPlanFeed
- ClaimRecovery
- ClaimTeamMemberFeed
- ContractGroupPlanFeed
- ContractGroupPlanGroupClassFeed
- CoverageTypeFeed
- CustomerPropertyFeed
- CustomObjectParticipantFeed
- DocumentChecklistItemFeed
- FinancialDealAssetFeed
- FinancialDealBid
- FinancialDealInteractionFeed
- FinancialDealParticipantFeed
- FinancialDealPartyFeed
- FinancialDealProductFeed
- FinancialSecurityFeed
- FinAssetPortfolioTgtAllocFeed
- FinclDealInteractionSummaryFeed
- GroupCensusFeed
- GroupCensusMemberFeed
- GroupCensusMemberPlanFeed
- IndexRateFeed
- InfoAuthorizationRequestFeed
- InfoAuthRequestFormFeed
- InsPolicyAssetRelatedObj
- InsPolicyCvrRelatedObj

- InsPolicyPtcpRelatedObj
- InsPolicyRelatedObject
- InsPolicyTransactionDetailFeed
- InsuranceClaimAssetFeed
- InsuranceContractFeed
- InsurancePolicyAssetFeed
- InsurancePolicyCoverageFeed
- InsurancePolicyFeed
- InsurancePolicyMemberAssetFeed
- InsurancePolicyParticipantFeed
- InsuranceProfileFeed
- InteractionRelatedAccountFeed
- InteractionSumDiscussedAccountFeed
- LoanApplicantAddressFeed
- LoanApplicantDeclarationFeed
- LoanApplicantEmploymentFeed
- LoanApplicantFeed
- LoanApplicantIncomeFeed
- LoanApplicationAssetFeed
- LoanApplicationFinancialFeed
- LoanApplicationLiabilityFeed
- LoanApplicationPropertyFeed
- LoanApplicationTitleHolderFeed
- MultipartyInfoAuthRequestFeed
- PartyCertifiedCapacityFeed
- PartyExpenseFeed
- PartyIdentityVerificationFeed
- PartyIdentityVerificationStepFeed
- PartyProfileFeed
- PartyProfileAddressFeed
- PartyProfileParticipantFeed
- PartyProfileRiskFeed
- PartyScreeningStepFeed
- PartyScreeningSummaryFeed
- PaymentRequest
- PaymentRequestLine
- PersonLifeEventFeed
- ProducerFeed
- ProducerPolicyAssignmentFeed
- ProductCoverageFeed

- ProductFeeFeed
- ProductListRateFeed
- QuoteLineItemGroupClassFeed
- RecordAlertFeed
- ResidentialLoanApplicationFeed
- SecuritiesHoldingFeed
- TagCategoryFeed
- WorkerCompCoverageClassFeed

*StandardObjectName*History

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

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

Supported Calls

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

Special Access Rules

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

Fields

Field Name	Details
*StandardObjectName*Id	**Type** reference **Properties** Filter, Group, Sort **Description** ID of the standard object.
DataType	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** Data type of the field that was changed.

Field Name	Details
`Field`	**Type** picklist **Properties** Filter, Group, Restricted picklist, Sort **Description** Name of the field that was changed.
`NewValue`	**Type** anyType **Properties** Nillable, Sort **Description** New value of the field that was changed.
`OldValue`	**Type** anyType **Properties** Nillable, Sort **Description** Old value of the field that was changed.

Objects That Follow This Model

These objects follow the standard pattern for associated feed objects.

- AccountParticipantHistory
- AppFormProductParticipantHistory
- ApplicationActionItemHistory
- ApplicantHistory
- ApplicationFormHistory
- ApplicationFormParticipantHistory
- ApplicationFormProductHistory
- ApplicationFormProductFeeHistory
- ApplicationFormProductProposalHistory
- ApplicationFormSellerItemHistory
- AuthFormRequestRecordHistory
- AuthorizationFormConsentHistory
- AuthorizationFormHistory
- AuthorizationFormTextHistory
- AwardHistory

- BankerHistory
- BatchJobHistory
- BatchJobPartFailedRecordHistory
- BatchJobPartHistory
- BranchUnitHistory
- BranchUnitBusinessMemberHistory
- BranchUnitCustomerHistory
- BrokerOfRecordHistory
- BusinessLicenseHistory
- BusinessMilestoneHistory
- BusinessProfileHistory
- ClaimCaseHistory
- ClaimHistory
- ClaimItemHistory
- ClaimItemRelatedObject
- ClaimParticipantHistory
- ClaimPayoutPlanHistory
- ClaimRecoveryHistory
- ClaimTeamMemberHistory
- CmsnProcUsageTrackingHistory
- CommissionStatementHistory
- CommissionStatementLineItemHistory
- ContractGroupPlanHistory
- ContractGroupPlanGroupClassHistory
- CoverageTypeHistory
- CustomerPropertyHistory
- CustomObjectParticipantHistory
- DataUsePurposeHistory
- DisputeHistory
- DisputeItemHistory
- DocChkItemValidatedTargetHistory
- DocumentCategoryHistory
- FlowOrchestrationInstRelaObjHistory
- DocumentChecklistItemHistory
- FinancialDealInteractionHistory
- FinancialDealAssetHistory
- FinancialDealBidHistory
- FinancialDealParticipantHistory
- FinancialDealPartyHistory
- FinancialDealProductHistory

- FinancialGoalHistory
- FinancialPlanHistory
- FinancialSecurityHistory
- FinAssetPortfolioTgtAllocHistory
- FinclDealInteractionSummaryHistory
- GroupCensusHistory
- GroupCensusMemberHistory
- GroupCensusMemberPlanHistory
- GroupClassHistory
- GroupClassContributionHistory
- GrpCensusGrpClassSummary
- IndexRateHistory
- InfoAuthorizationRequestHistory
- InfoAuthRequestFormHistory
- InsBnftEligDefinitionHistory
- InsContributionPlnGroupClsHistory
- InsContributionPlnLineItemHistory
- InsPlcyLimit
- InsPlcyLimitTracking
- InsPolicyAssetRelatedObj
- InsPolicyBenefitEligibilityHistory
- InsPolicyCoverageBenefitHistory
- InsPolicyCoverageNetworkHistory
- InsPolicyCvrRelatedObj
- InsPolicyPtcpRelatedObj
- InsPolicyRelatedObject
- InsPolicyTransactionDetailHistory
- InsuranceClaimAssetHistory
- InsuranceContractHistory
- InsuranceContributionPlanHistory
- InsurancePolicyAssetHistory
- InsurancePolicyCoverageHistory
- InsurancePolicyHistory
- InsurancePolicyMemberAssetHistory
- InsurancePolicyParticipantHistory
- InsuranceProfileHistory
- InsuranceRatePlanHistory
- InsuranceRatePlanCommissionHistory
- InsuranceRatePlanLineItemHistory
- InteractionRelatedAccountHistory

- InteractionSumDiscussedAccountHistory
- LoanApplicantAddressHistory
- LoanApplicantAssetHistory
- LoanApplicantDeclarationHistory
- LoanApplicantEmploymentHistory
- LoanApplicantHistory
- LoanApplicantIncomeHistory
- LoanApplicantLiabilityHistory
- LoanApplicationAssetHistory
- LoanApplicationFinancialHistory
- LoanApplicationLiabilityHistory
- LoanApplicationPropertyHistory
- LoanApplicationTitleHolderHistory
- MultipartyInfoAuthRequestHistory
- PartyCertifiedCapacityHistory
- PartyExpenseHistory
- PartyIdentityVerificationHistory
- PartyIdentityVerificationStepHistory
- PartyProfileHistory
- PartyProfileAddressHistory
- PartyProfileParticipantHistory
- PartyProfileRiskHistory
- PartyScreeningStepHistory
- PartyScreeningSummaryHistory
- PaymentRequestHistory
- PaymentRequestLineHistory
- PersonEducationHistory
- PersonLifeEventHistory
- ProdtAttrMappedScope
- ProdtAttrScope
- ProducerHistory
- ProducerPolicyAssignmentHistory
- ProducerSplitArngLineItemHistory
- ProducerSplitArrangementHistory
- ProducerSplitAssignmentHistory
- ProducerSplitRoleAssignmentHistory
- ProducerRelationshipHistory
- ProductCoverageHistory
- ProductFeeHistory
- ProductListRateHistory

- ProductSurcharge
- QuoteLineItemGroupClassHistory
- RecordAlertHistory
- ResidentialLoanApplicationHistory
- SecuritiesHoldingHistory
- Surcharge
- TagCategoryHistory
- UserFinancialAuthority
- WorkerCompCoverageClassHistory

*StandardObjectName*OwnerSharingRule

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

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

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

Supported Calls

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

Special Access Rules

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

Fields

Field Name	Details
`AccessLevel`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Determines the level of access users have to records. Values are: • `Read` (read only)

Field Name	Details
	• `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 object's name in a managed package and the changes are reflected in a subscriber's organization. Note: When creating large sets of data, always specify a unique `DeveloperName` for each record. If no `DeveloperName` is specified, performance slows down while Salesforce generates one for each record.
`GroupId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** ID of the source group. Records that are owned by users in the source group trigger the rule to give access.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Label of the sharing rule as it appears in the UI. Maximum length is 80 characters.
`UserOrGroupId`	**Type** reference

Field Name	Details
	Properties Create, Filter, Group, Sort **Description** ID of the user or group that you are granting access to.

Objects That Follow This Model

These objects follow the standard pattern for associated feed objects.

- ActionPlanOwnerSharingRule
- ActionPlanTemplateOwnerSharingRule
- ApplicationFormOwnerSharingRule
- ApplicationFormProductOwnerSharingRule
- AwardOwnerSharingRule
- BranchUnitOwnerSharingRule
- BrokerOfRecordOwnerSharingRule
- BusinessLicenseOwnerSharingRule
- ClaimOwnerSharingRule
- ClaimRecoveryOwnerSharingRule
- CommissionStatementOwnerSharingRule
- CommissionStatementLineItemOwnerSharingRule
- ContractGroupPlanGroupClassOwnerSharingRule
- CoverageTypeOwnerSharingRule
- CustomerPropertyOwnerSharingRule
- DisputeOwnerSharingRule
- DocumentChecklistItemOwnerSharingRule
- FinancialDealOwnerSharingRule
- FinancialDealPartyOwnerSharingRule
- FinancialDealProductOwnerSharingRule
- FinancialGoalOwnerSharingRule
- FinancialPlanOwnerSharingRule
- FlowOrchestrationInstRelaObjOwnerSharingRule
- GroupCensusOwnerSharingRule
- GroupCensusmemberPlanOwnerSharingRule
- GroupClassOwnerSharingRule
- InsContributionPlnGroupClsOwnerSharingRule
- InsPolicyBenefitEligibilityOwnerSharingRule
- InsuranceContractOwnerSharingRule
- InsuranceContributionPlanOwnerSharingRule

- InsurancePolicyAssetOwnerSharingRule
- InsurancePolicyOwnerSharingRule
- InsuranceRatePlanOwnerSharingRule
- InteractionOwnerSharingRule
- InteractionSummaryOwnerSharingRule
- LoanApplicantDeclarationOwnerSharingRule
- LoanApplicantEmploymentOwnerSharingRule
- LoanApplicantIncomeOwnerSharingRule
- LoanApplicantOwnerSharingRule
- LoanApplicationAssetOwnerSharingRule
- LoanApplicationLiabilityOwnerSharingRule
- PartyCertifiedCapacityOwnerSharingRule
- PaymentRequestOwnerSharingRule
- PersonEducationOwnerSharingRule
- PersonLifeEventOwnerSharingRule
- ProducerOwnerSharingRule
- ProducerPolicyAssignmentOwnerSharingRule
- ProducerSplitArngLineItemOwnerSharingRule
- ProducerSplitArrangementOwnerSharingRule
- ProducerSplitAssignmentOwnerSharingRule
- ProducerSplitRoleAssignmentOwnerSharingRule
- ProductCoverageOwnerSharingRule
- ResidentialLoanApplicationOwnerSharingRule
- SecuritiesHoldingOwnerSharingRule
- Surcharge
- UserFinancialAuthorityOwnerSharingRule
- WorkerCompCoverageClassOwnerSharingRule

*StandardObjectName*Share

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

The object name is variable and uses *StandardObjectName*Share syntax. For example, AccountBrandShare is a sharing entry on an account brand. We list the available associated share objects at the end of this topic. For specific version information, see the standard object documentation.

Supported Calls

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

Special Access Rules

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

Fields

Field Name	Details
`AccessLevel`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** The level of access allowed. Values are: • `All` (owner) • `Edit` (read/write) • `Read` (read only)
`ParentId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** ID of the parent record.
`RowCause`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort **Description** Reason that the sharing entry exists.
`UserOrGroupId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** ID of the user or group that has been given access to the object.

Objects That Follow This Model

These objects follow the standard pattern for associated feed objects.

- ApplicationActionItemShare
- ApplicationFormShare
- ActionPlanShare
- ActionPlanTemplateShare
- ApplicationFormProductShare
- ApplicationFormShare
- AuthorizationFormConsentShare
- AuthorizationFormShare
- AwardShare
- BankerShare
- BranchUnitShare
- BrokerOfRecordShare
- BusinessLicenseShare
- ClaimRecoveryShare
- ClaimShare
- CommissionStatementShare
- CommissionStatementLineItemShare
- ContractGroupPlanGroupClassShare
- CoverageTypeShare
- CustomerPropertyShare
- CustomObjectParticipantShare
- DataUsePurposeShare
- DisputeShare
- DocumentChecklistItemShare
- FinancialDealShare
- FinancialDealPartyShare
- FinancialDealProductShare
- FinancialGoalShare
- FinancialPlanShare
- FinancialSecurityShare
- FinAssetPortfolioTgtAllocShare
- FlowOrchestrationInstRelaObjShare
- GroupCensusShare
- GroupCensusMemberPlanShare
- GroupClassShare
- IndexRateShare
- InfoAuthorizationRequestShare
- InsContributionPlnGroupClsShare
- InsPlcyLimitTracking
- InsuranceContractShare

- InsuranceContributionPlanShare
- InsurancePolicyAssetShare
- InsPolicyBenefitEligibilityShare
- InsurancePolicyShare
- InsuranceRatePlanShare
- InteractionShare
- InteractionSummaryShare
- LoanApplicantDeclarationShare
- LoanApplicantEmploymentShare
- LoanApplicantIncomeShare
- LoanApplicantShare
- LoanApplicationAssetShare
- LoanApplicationLiabilityShare
- MultipartyInfoAuthRequestShare
- PartyCertifiedCapacityShare
- PartyExpenseShare
- PartyIdentityVerificationShare
- PartyProfileShare
- PartyProfileAddressShare
- PartyProfileRiskShare
- PartyScreeningSummaryShare
- PaymentRequestShare
- PersonEducationShare
- PersonLifeEventShare
- ProdtAttrMappedScope
- ProdtAttrScope
- ProducerSplitArngLineItemShare
- ProducerSplitAssignmentShare
- ProducerSplitRoleAssignmentShare
- ProducerPolicyAssignmentShare
- ProducerSplitArrangementShare
- ProducerShare
- ProductCoverageShare
- ProductFeeShare
- ProductListRateShare
- RecordAlertShare
- ResidentialLoanApplicationShare
- SecuritiesHoldingShare
- Surcharge
- TagCategoryShare

- UserFinancialAuthorityShare
- WorkerCompCoverageClassShare

APEX REFERENCE

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

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

ConnectApi Namespace

The `ConnectApi` namespace (also called Connect in Apex) provides classes for accessing the same data available in Connect REST API. Use Connect in Apex to create custom experiences in Salesforce.

commonserviceexcellence Namespace

The `commonserviceexcellence` namespace provides classes used in financial account FlexCards.

disputemanagement Namespace

The `disputemanagement` namespace classes provide services for Integration Procedures that the Transaction Dispute Management OmniScript calls.

fsccashflow Namespace

The `fsccashflow` namespace provides classes used in the FSCCashFlow Flexcards and its child Flexcards.

fsccomplaintmanagement Namespace

The `fsccomplaintmanagement` namespace classes provide data helper functions for use in complaint management.

fschousehold Namespace

The `fschousehold` namespace provides classes used in the Financial Goals and Plans FlexCards.

fscserviceprocesses Namespace

The `fscserviceprocesses` namespace provides classes used in Service Process OmniScripts.

fscwmgen Namespace

The `fscwmgen` namespace provides an interface used for Record Alerts.

industriespersonalizedfinance Namespace

The `industriespersonalizedfinance` namespace classes provide data helper functions for use in personalized finance.

`ConnectApi` Namespace

The `ConnectApi` namespace (also called Connect in Apex) provides classes for accessing the same data available in Connect REST API. Use Connect in Apex to create custom experiences in Salesforce.

For information about working with the `ConnectApi` classes, see Connect in Apex.

Dispute Management Methods

These are `IDisputeManagementConnectFamily` methods for Financial Services Cloud.

Public Complaint Methods

These are `createComplaint(complaintMgmtRequestData)` methods for Financial Services Cloud.

RecordAlert Methods

These are `RecordAlert` methods for Financial Services Cloud.

Input Classes

These are Apex input classes in Financial Services Cloud.

Output Classes

These are Apex output classes in Financial Services Cloud.

ConnectApi Enums

Enums specific to the `ConnectApi` namespace and Industries features.

Dispute Management Methods

These are `IDisputeManagementConnectFamily` methods for Financial Services Cloud.

ethocaAlertCallback(disputeManagementRequestData)

Send an Ethoca alert callback for transaction dispute management.

`ethocaAlertCallback(disputeManagementRequestData)`

Send an Ethoca alert callback for transaction dispute management.

API Version

60.0

Requires Chatter

No

Signature

```
public static ConnectApi.EthocaAlertCallbackOutputRepresentation
ethocaAlertCallback(ConnectApi.EthocaAlertCallbackInputRepresentation
disputeManagementRequestData)
```

Parameters

`disputeManagementRequestData`

Type: ConnectApi.EthocaAlertCallbackInputRepresentation

Description: Ethoca alert input class for transaction dispute management.

Return Value

Type: ConnectApi.EthocaAlertCallbackOutputRepresentation

Public Complaint Methods

These are `createComplaint(complaintMgmtRequestData)` methods for Financial Services Cloud.

createComplaint(complaintMgmtRequestData)

Create a customer complaint.

createComplaint(complaintMgmtRequestData)

Create a customer complaint.

API Version

58.0

Requires Chatter

No

Signature

```
public static ConnectApi.ComplaintMgmtOutputRepresentation
createComplaint(ConnectApi.ComplaintMgmtRequestInputRepresentation
complaintMgmtRequestData)
```

Parameters

complaintMgmtRequestData

Type: ConnectApi.ComplaintMgmtRequestInputRepresentation

Input representation of the request to create a public complaint.

Return Value

Type: ConnectApi.ComplaintMgmtOutputRepresentation

Example

```
ConnectApi.ComplaintMgmtRequestInputRepresentation input = new
ConnectApi.ComplaintMgmtRequestInputRepresentation();
input.assessmentId='0U3RO0000000Cp20AE';

//caseInfo
ConnectApi.CaseInfoWrapper caseInfo=new ConnectApi.CaseInfoWrapper();
caseInfo.additionalInfo = new Map<String, ConnectApi.GenericObjectWrapper>();
ConnectApi.GenericObjectWrapper caseReason= new ConnectApi.GenericObjectWrapper();
                  caseReason.value='case reason';
                  caseInfo.additionalInfo.put('Reason', caseReason);
caseInfo.accountId='001RO0000004WKi1YAG';
caseInfo.subject='Reversal of Account Annual Maintenance Charges';
caseInfo.status='Pending';
caseInfo.description='Annual maintenance charges to be reversed';
caseInfo.origin='Email';
caseInfo.reason='Other';
input.caseInfo = new ConnectApi.CaseInfoWrapper();
```

```
//complaintInfo
ConnectApi.ComplaintInfoWrapper complaintInfo=new ConnectApi.ComplaintInfoWrapper();
complaintInfo.incidentDate = '2022-04-07';
complaintInfo.type = 'Information, sums/charges or product performance';
complaintInfo.subType = 'Product disclosure information';
complaintInfo.status = 'In Progress';
complaintInfo.subject = 'Account Annual Maintenance Charges';
complaintInfo.priority = 'High';
complaintInfo.description = 'Annual maintenance charges not disclosed upfront';
complaintInfo.email = 'Tody@email.com';
complaintInfo.productTye = 'Credit Card or Prepaid Card';
complaintInfo.additionalInfo=new Map<String, ConnectApi.GenericObjectWrapper>();
ConnectApi.GenericObjectWrapper sourceTypeObj= new ConnectApi.GenericObjectWrapper();
                    sourceTypeObj.value=sourceType;
                    complaintInfo.additionalInfo.put('SourceType', sourceTypeObj);
input.complaintInfo = new ConnectApi.ComplaintInfoWrapper();


//caseParticipantInfo
input.caseParticipantInfo = new List<ConnectApi.CaseParticipantInfoWrapper>();
ConnectApi.CaseParticipantInfoWrapper caseParticipantInfo = new
ConnectApi.CaseParticipantInfoWrapper();
caseParticipantInfo.participantId = '001RO000004KYfrYAG';
caseParticipantInfo.role = 'Complainant Representative';
caseParticipantInfo.status = 'Pending';
caseParticipantInfo.preferredCallTimeFrom = '10:30:30';
caseParticipantInfo.preferredCallTimeTo = '12:30:30';
caseParticipantInfo.preferredCommunicationMode = 'Email';
caseParticipantInfo.authorizationProof = 'Email';
input.caseParticipantInfo.add(caseParticipantInfo);

//documentInfoAttributes
ConnectApi.DocumentInfoAttributesWrapper doc1=new ConnectApi.DocumentInfoAttributesWrapper();
doc1.id='069RO00000048wfYAA';
doc1.name='PAN';
doc1.typeId='0deRO00000000J7YAI';

//documentInfoAttributesList
input.documentInfo=new List<ConnectApi.DocumentInfoAttributesWrapper>();
input.documentInfo.add(doc1);

input.shouldInclInRegulatoryRpt=true;
System.debug(ConnectApi.IComplaintMgmtConnectFamily.createComplaint(input));
```

RecordAlert Methods

These are `RecordAlert` methods for Financial Services Cloud.

getRecordAlertsForFinancialAccount(financialAccountId)

Retrieve a list of active record alerts on financial accounts.

getRecordAlertsForPersonAccount(personId)

Retrieve a list of active record alerts on person accounts.

getRecordAlertsForFinancialAccount(financialAccountId)

Retrieve a list of active record alerts on financial accounts.

API Version

54.0

Requires Chatter

No

Signature

```
public static ConnectApi.RecordAlertCollectionRepresentation
getRecordAlertsForFinancialAccount(String financialAccountId)
```

Parameters

financialAccountId

Type: String

The financial account record ID.

Return Value

Type: ConnectApi.RecordAlertCollection

getRecordAlertsForPersonAccount(personId)

Retrieve a list of active record alerts on person accounts.

API Version

54.0

Requires Chatter

No

Signature

```
public static ConnectApi.RecordAlertCollectionRepresentation
getRecordAlertsForPersonAccount(String personId)
```

Parameters

personId
Type: String

The person account record ID.

Return Value

Type: `ConnectApi.RecordAlertCollection`

Input Classes

These are Apex input classes in Financial Services Cloud.

ConnectApi.CaseInfoWrapper
Input representation of a case related to the complaint.

ConnectApi.CaseParticipantInfoWrapper
Input representation of a case participant associated with the complaint.

ConnectApi.ComplaintInfoWrapper
Input representation of the complaint details.

ConnectApi.ComplaintMgmtRequestInputRepresentation
Input representation of the request to create a public complaint.

ConnectApi.DocumentInfoAttributesWrapper
Input representation of the details of a supporting document for the complaint.

ConnectApi.EthocaAlertCallbackInputRepresentation
Ethoca alert input class for transaction dispute management.

ConnectApi.EthocaEvent
Ethoca event input class.

ConnectApi.EthocaLinks
Ethoca resource link input class.

ConnectApi.GenericObjectWrapper
Input representation of additional details of the case, case participant, or complaint.

ConnectApi.CaseInfoWrapper

Input representation of a case related to the complaint.

Property	Type	Description	Required or Optional	Available Version
`accountId`	String	ID of the account associated with the complainant.	Optional	58.0

Property	Type	Description	Required or Optional	Available Version
additionalInfo	Map<String, ConnectApi.GenericObjectWrapper on page 1046>	Additional information about the case.	Optional	58.0
description	String	Description of the case.	Optional	58.0
origin	String	Origin of the case. Possible values are: • Email • Phone • Web	Optional	58.0
reason	String	Reason for creating the case. Possible values are: • Breakdown • Equipment Complexity • Equipment Design • Feedback • Installation • Other • Performance	Optional	58.0
status	String	Status of the case. Possible values are: • Escalated • In Progress • New • On Hold • Response Received • Submitted • Waiting for Customer • Working	Optional	58.0
subject	String	Subject of the case.	Optional	58.0

ConnectApi.CaseParticipantInfoWrapper

Input representation of a case participant associated with the complaint.

Property	Type	Description	Required or Optional	Available Version
additionalInfo	Map<String, ConnectApi.GenericObjectWrapper on page 1046>	Additional information about the case participant.	Optional	58.0
authorizationProof	String	Proof of authorization for the case participant. Possible values are: • Email Consent • Verbal Consent • Power of Attorney • Joint Ownership	Required when the complainant is a customer representative, otherwise optional	58.0
participantId	String	Case participant's account ID.	Required	58.0
preferredCallTimeFrom	String	Preferred time window to call the case participant.	Optional	58.0
preferredCallTimeTo	String	Preferred time window to call the case participant.	Optional	58.0
preferredCommunicationMode	String	Preferred mode of communication by the case participant to get updates related to the complaint.	Optional	58.0
role	String	Role of the case participant. Possible values are: • Complainant • Complainant Representative	Optional	58.0
status	String	Status of the case related to the participant. Possible values are: • Active • In Review • Pending • Submitted	Optional	58.0

ConnectApi.ComplaintInfoWrapper

Input representation of the complaint details.

Property	Type	Description	Required or Optional	Available Version
accountId	String	ID of the account associated with the complainant.	Optional	58.0

Property	Type	Description	Required or Optional	Available Version
additionalInfo	Map<String, ConnectApi.GenericObject> on page 1046>	Additional details of the complaint.	Optional	58.0
complaintSubType	String	Subtype of the complaint. Possible values are: • Account Opening/Closure • Attempts to Collect Debt not Owed • Auto Debit Mandate • Cash not Dispensed • Communication Tactics • Credit Limit Changed • Credit Report / Credit Score • Delays / Timescales • Disputes over sum/charges • Errors / not following instructions • Fraud Handling • Inaccessible ATMs • Inaccessible Branch Entrances • Inaccessible Website • Inaccessible Mobile banking features • Misleading Advertising • Mobile Banking - Features or Functionality • No Written Notification About Debt • Online Banking Features or Functionality • Other General Admin/Customer Service • Others • Problem when Making Payments • Product Disclosure Information	Required	58.0

Property	Type	Description	Required or Optional	Available Version
		• `Product Performance/Features` • `Unauthorized Transaction(s)Unclear Arrangement` • `Unclear Guidance` • `Unsuitable Advice`		
`complaintType`	String	Type of the complaint. Possible values are: • `Accessibility Issues` • `Advising, Selling and Arranging` • `Digital or Technology` • `Financial Hardships or Collections` • `General Admin/ Customer Service` • `Information, sums/charges or product performance` • `Lending / Credit` • `Marketing or Corporate Communications` • `Others` • `Transaction Related`	Required	58.0
`description`	String	Description of the complaint.	Optional	58.0
`email`	String	Email ID of the complainant.	Optional	58.0
`incidentDate`	String	Date the complaint-related incident occurred.	Required	58.0
`priority`	String	Priority of the complaint. Possible values are: • `Critical` • `High` • `Low` • `Medium` The default value is `Medium`.	Optional	58.0
`productType`	String	Product type related to the complaint. Possible values are: • `ATM / debit card`	Optional	58.0

Property	Type	Description	Required or Optional	Available Version
		• `Credit Card or Prepaid Card` • `Insurance` • `Investments` • `Merchant Services` • `Mobile / electronic banking` • `Money transfers, virtual currency, and money services` • `Mortgage / Home Finance` • `Other` • `Personal Loan / other loans` • `Vehicle loan or lease`		
`receivedDate`	String	Date of reporting for the complaint.	Required	58.0
`status`	String	Resolution status of the complaint. Possible values are: • `In Review` • `Pending` • `Resolved` • `Submitted` The default value is `Submitted`.	Optional	58.0
`subject`	String	Subject of the complaint.	Optional	58.0

ConnectApi.ComplaintMgmtRequestInputRepresentation

Input representation of the request to create a public complaint.

Property	Type	Description	Required or Optional	Available Version
`assessmentId`	String	Pre-complaint assessment ID. Pre-complaint assessment contains a set of questions for the customer before creating a complaint. It helps to better understand the customer issue.	Optional	58.0

Property	Type	Description	Required or Optional	Available Version
caseInfo	ConnectApi.CaseInfoWrapper on page 1039	Details of the case to be created to address the complaint. A case is created by default when you raise a complaint. Use this field to add more details to the case.	Optional	58.0
caseParticipantInfo	ConnectApi.CaseParticipantWrapper on page 1040>	Details of the case participant raising the complaint. A case participant can be a customer or a customer representative.	Required	58.0
complaintInfo	ConnectApi.ComplaintInfoWrapper on page 1041	Details of the complaint to be raised.	Required	58.0
documentInfo	ConnectApi.DocumentInfoAttributesWrapper on page 1045>	Details of the documents supporting the complaint.	Optional	58.0
shouldIncludeInRegulatoryRpt	Boolean	Indicates whether to include the complaint in regulatory reports (`true`) or not (`false`). The default value is `false`.	Optional	58.0

ConnectApi.DocumentInfoAttributesWrapper

Input representation of the details of a supporting document for the complaint.

Property	Type	Description	Required or Optional	Available Version
id	String	ID of the supporting content document.	Required	58.0
name	String	Name of the supporting content document.	Required	58.0
typeId	String	ID of the supporting content document type.	Optional	58.0

ConnectApi.EthocaAlertCallbackInputRepresentation

Ethoca alert input class for transaction dispute management.

Property	Type	Description	Required or Optional	Available Version
ethocaInputPayload	List<ConnectApi.EthocaEvent>	Ethoca event input class.	Required	60.0

ConnectApi.EthocaEvent

Ethoca event input class.

Property	Type	Description	Required or Optional	Available Version
`eventType`	String	Type of event.	Required	60.0
`id`	String	ID of the event.	Required	60.0
`resourceLink`	ConnectApi.EthocaLinks	Resource link for the event.	Required	60.0

ConnectApi.EthocaLinks

Ethoca resource link input class.

Property	Type	Description	Required or Optional	Available Version
`resource`	String	Resource link.	Required	60.0

ConnectApi.GenericObjectWrapper

Input representation of additional details of the case, case participant, or complaint.

Property	Type	Description	Required or Optional	Available Version
`value`	`Object`	Additional details of the case, case participant, or complaint.	Optional	58.0

Output Classes

These are Apex output classes in Financial Services Cloud.

ConnectApi.ComplaintMgmtOutputRepresentation
Output representation of the created public complaint.

ConnectApi.EthocaAlertCallbackOutputRepresentation
Ethoca alert callback output class for dispute management.

ConnectApi.RecordAlert
Representation of the details of a record alert.

ConnectApi.RecordAlertActionInfo
Representation of the information of the record alert action.

ConnectApi.RecordAlertActionInfoCollection
Representation of the details of an action on the record alert.

ConnectApi.RecordAlertCollection

Representation of a collection of record alerts.

ConnectApi.ComplaintMgmtOutputRepresentation

Output representation of the created public complaint.

Property Name	Type	Description	Available Version
`caseId`	String	ID of the case associated with the created complaint.	58.0
`caseNumber`	String	Case number associated with the created complaint.	58.0
`publicComplaintId`	String	ID of the created public complaint.	58.0

ConnectApi.EthocaAlertCallbackOutputRepresentation

Ethoca alert callback output class for dispute management.

Property Name	Type	Description	Available Version
`message`	String	Message describing whether the request was successful.	60.0
`statusCode`	String	HTTP status code.	60.0

ConnectApi.RecordAlert

Representation of the details of a record alert.

Property Name	Type	Description	Available Version
`actions`	`ConnectApi.RecordAlertActionInfoCollection`	Represents the details of an action taken on a record alert.	54.0
`active`	Boolean	Indicates whether a record alert is active (`true`) or not (`false`).	54.0
`description`	String	The description of a record alert.	54.0
`effectiveDate`	Datetime	The start date and time from when an active record alert is in effect.	54.0
`id`	String	The record alert ID.	54.0
`parentId`	String	The parent ID of a record alert.	54.0
`recordAlertCategoryName`	String	The category name of a record alert.	54.0
`severity`	`ConnectApi.RecordAlertSeverityType`	Indicates the degree of impact of a record alert. Possible values are: • `Error`	54.0

Property Name	Type	Description	Available Version
		• Info • Warning	
source	ConnectApi.RecordAlertSourceTypeEnum	Identifies the source system that generated the record alert. Possible values are: • Apex • Internal	54.0
sourceSystemId	String	The ID of the source system that this record alert was sourced from.	54.0
subject	String	The subject line of a record alert.	54.0
validUntilDate	Datetime	The date and time from when a record alert is no longer valid.	54.0
whatId	String	The Salesforce object record ID on which a record alert is created.	54.0

ConnectApi.RecordAlertActionInfo

Representation of the information of the record alert action.

Property Name	Type	Description	Available Version
actionName	String	The name of the action performed on a record alert. Possible values are: • Dismiss • Snooze	54.0
parameters	List<String>	List of parameters specified for the record alert action.	54.0

ConnectApi.RecordAlertActionInfoCollection

Representation of the details of an action on the record alert.

Property Name	Type	Description	Available Version
actionInfoCollection	List<ConnectApi.RecordAlertActionInfo>	Represents the action details of a record alert.	54.0

ConnectApi.RecordAlertCollection

Representation of a collection of record alerts.

Property Name	Type	Description	Available Version
recordAlerts	List<ConnectApi.RecordAlert>	Represents the details of a record alert.	54.0

ConnectApi Enums

Enums specific to the ConnectApi namespace and Industries features.

ConnectApi enums inherit all properties and methods of Apex enums.

Enums are not versioned. Enum values are returned in all API versions. Clients should handle values they don't understand gracefully.

Enum	Description
ConnectApi.EthocaAlertOutcome	Type of Ethoca alert outcome. • AccountSuspended • InProgress • NotFound • NotProvided • Other • PartiallyStopped • PreviouslyCancelled • PreviouslyRefunded • Resolved • ShipperContacted • Stopped • TooLate • UnresolvedDispute
ConnectApi.EthocaAlertRefundStatus	Type of Ethoca alert refund status. • NotRefunded • NotSettled • Refunded
ConnectApi.EthocaEventType	Type of Ethoca event. • AlertOutcomeUpdated • BatchProcessed
ConnectApi.RecordAlertSourceTypeEnum	Type of source system. • Apex • Internal
ConnectApi.RecordAlertSeverityType	Type of severity. • Error

Enum	Description
	• `Info` • `Warning`

commonserviceexcellence Namespace

The `commonserviceexcellence` namespace provides classes used in financial account FlexCards.

Note: The commonserviceexcellence namespace cannot be used in DML operations.

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

IntegrationHandler Class
Use the callable IntegrationHandler class to fetch financial transaction data.

IntegrationHandler Class

Use the callable IntegrationHandler class to fetch financial transaction data.

Namespace

commonserviceexcellence

Usage

The ServiceExcellenceAlertCard and ServiceExcellenceGenericAlertCard have Integration Procedure data sources that call the IntegrationHandler class. These FlexCards display information about financial accounts.

All of the IntegrationHandler methods reference an Integration Definition configured in Setup. Some methods reference the **Fetch Real Time Financial Account Info** preference in Setup.

IntegrationHandler Methods

IntegrationHandler Methods

The following are methods for `IntegrationHandler`. You can use the call method to invoke the executeOmniCallback or getOmniContinuation method, or you can invoke those methods directly.

call(action, args)
This method calls one of the available IntegrationHandler actions and passes arguments to that action.

executeCallout(requestId, payload, devName)
Calls the provider class defiled in the Integration Definition record referenced by the devName parameter. The Industries: SendApex Async Request invocable action calls this method.

executeLightningCallback(labels, state)

Calls back the method that is called automatically after the Continuation from getLightningContinuation is executed. Internally calls the callback method of the provider.

executeOmniCallback(input, output, options)

Calls back the method that is called automatically after the Continuation from getOmniContinuation is executed. Internally calls the callback method of the provider.

getLightningContinuation(requestId, params, devName, input)

Gets the Continuation object returned by the provider defined in the Integration Definition record referenced by the devName parameter.

getOmniContinuation(requestId, params, options, devName, input)

Gets the Continuation object returned by the provider defined in the Integration Definition record referenced by the devName parameter.

`call(action, args)`

This method calls one of the available IntegrationHandler actions and passes arguments to that action.

Signature

```
public Object call(String action, Map<String, Object> args)
```

Parameters

`action`

Type: String

The action to call. The value must be one of the following method names:

- *`executeOmniCallback`* — Invokes the executeOmniCallback method.
- *`getContinuation`* — Invokes the getOmniContinuation method.
- *`getTransactionProperties`* — Checks if the org has the **Fetch Real Time Financial Account Info** preference set to on. If the preference is on, FlexCards display data from the core banking system.

`args`

Type: Map<String, Object>

The first three keys must be input, output, and options. The required keys under input depend on the method the action invokes. For the getTransactionProperties action, provide empty input, output, and options keys.

Return Value

Type: Map<String, Object>

The return values of the corresponding action.

The getTransactionProperties action returns the orgHasFetchFAInfo property, which is true or false based on whether the **Fetch Real Time Financial Account Info** preference is on or off.

Usage

To use this class in an Integration Procedure, specify the class in the Remote Class property, the action in the Remote Method property, and the arguments in the Additional Input property.

executeCallout(requestId, payload, devName)

Calls the provider class defiled in the Integration Definition record referenced by the devName parameter. The Industries: SendApex Async Request invocable action calls this method.

Signature

```
global static IntegrationCalloutResponse executeCallout(String requestId, String payload,
String devName)
```

Parameters

requestId
Type: String

Represents a unique ID string that identifies the record containing the input data to the API call.

payload
Type: String

Represents any string that needs to be passed directly to the provider.

devName
Type: String

Represents the Developer Name of the Integration Definition record.

Return Value

Returns the IntegrationCalloutResponse object, which contains the following properties:

- Boolean isSuccess — Indicates if the API call was successful.
- Map<String, Object> returnValue — Response from the API call after the callback method has processed the response.
- String error — Contains the error message in case of an error.

executeLightningCallback(labels, state)

Calls back the method that is called automatically after the Continuation from getLightningContinuation is executed. Internally calls the callback method of the provider.

Signature

```
global static Object executeLightningCallback(List<String> labels, Map<String, Object>
state)
```

Parameters

labels
Type: List<String>

Represents a list of label strings for retrieving the callout responses.

state
Type: Map<String, Object>

Represents a map with the request ID, provider key, and Continuation state.

Return Value

Returns one of the following:

- If successful, returns a Map<String, Object> response from the API call after the callback method has processed the response.
- If unsuccessful, returns a String value containing the error message.

Usage

This method isn't meant to be called directly — the LWC framework calls it automatically.

executeOmniCallback(input, output, options)

Calls back the method that is called automatically after the Continuation from getOmniContinuation is executed. Internally calls the callback method of the provider.

Signature

```
global static Object executeOmniCallback(Map<String, Object> input, Map<String, Object>
output, Map<String, Object> options)
```

Parameters

input
Type: Map<String, Object>

Represents the original input that was passed into getOmniContinuation method.

output
Type: Map<String, Object>

Represents the output from the API call.

options
Type: Map<String, Object>

Represents parameters passed by OmniStudio.

Return Value

Returns the IntegrationCalloutResponse object, which contains the following properties:

- Boolean isSuccess — Indicates if the API call was successful.
- Map<String, Object> returnValue — Response from the API call after the callback method has processed the response.
- String error — Contains the error message in case of an error.

Usage

This method isn't meant to be called directly — the OmniContinuation framework calls it automatically.

getLightningContinuation(requestId, params, devName, input)

Gets the Continuation object returned by the provider defined in the Integration Definition record referenced by the devName parameter.

Signature

```
global static Continuation getLightningContinuation(String requestId, Map<String,
String> params, String devName, Map<String, Object> input)
```

Parameters

requestId
Type: String

Represents a unique ID string that identifies the request.

params
Type: Map<String, String>

Represents parameters passed directly to the provider class.

devName
Type: String

Represents the Developer Name of the Integration Definition record.

input
Type: Map<String, Object>

If the Integration Definition references an external service, the input parameter contains the following properties:

- InputRecordId — ID of the record containing the input data to the API call.
- OutputRecordId — ID of the record to which output data from the API call is written.

Return Value

Returns the Continuation object.

Usage

To use this class:

1. Create a provider class or preprocessor and postprocessor OmniStrudio assets.
2. Define an Integration Definition record in Setup.
3. Call this method to get the Continuation to call from the LWC component.

getOmniContinuation(requestId, params, options, devName, input)

Gets the Continuation object returned by the provider defined in the Integration Definition record referenced by the devName parameter.

Signature

```
global static Continuation getOmniContinuation(String requestId, Map<String, String>
params, Map<String, Object> options, String devName, Map<String, Object> input)
```

Parameters

requestId
Type: String

Represents a unique ID string that identifies the request.

params
Type: Map<String, String>

Represents parameters passed directly to the provider class.

options
Type: Map<String, Object>

Represents parameters passed by OmniStudio.

devName
Type: String

Represents the Developer Name of the Integration Definition record.

input
Type: Map<String, Object>

If the Integration Definition references an external service, the input parameter contains the following properties:

- InputRecordId — ID of the record containing the input data to the API call.
- OutputRecordId — ID of the record to which output data from the API call is written.

Return Value

Returns the Continuation object.

Usage

To use this class:

1. Create a provider class that implements the ServiceIntegrationProvider interface, or create preprocessor and postprocessor OmniStrudio assets.
2. Define an Integration Definition record in Setup.
3. Call this method to get the Continuation to call from an Integration Procedure.

disputemanagement Namespace

The `disputemanagement` namespace classes provide services for Integration Procedures that the Transaction Dispute Management OmniScript calls.

Note: The disputemanagement namespace cannot be used in DML operations.

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

DisputeMgmtHelper Class
Use the callable DisputeMgmtHelper class to provide data helper functions for use in the Transaction Dispute Management OmniScript, such as raising a dispute request or creating a dispute merchant alert.

DisputeMgmtHelper Class

Use the callable DisputeMgmtHelper class to provide data helper functions for use in the Transaction Dispute Management OmniScript, such as raising a dispute request or creating a dispute merchant alert.

Namespace

disputemanagement

DisputeMgmtHelper Methods

The following are methods for `DisputeMgmtHelper`.

DisputeMgmtHelper Methods

The following are methods for `DisputeMgmtHelper`.

`DisputeMgmtHelper` is a callable class. Its main method is `call`.

call(action, args)

This method calls one of the available `DisputeMgmtHelper` actions and passes arguments to that action.

getDisputeItems(caseId)

Returns disputed transactions related to the specified Case ID. Called by the createDisputeItemMerchAlert, getAlertStatusDetails, getDisputeBatchDetails actions of the call method.

getEthocaAPIRequest(disputeItems, disputeType, namedCredential)

Prepares the payload used in the dispute flow and sends it to the integration provider, retrying if necessary.

`call(action, args)`

This method calls one of the available `DisputeMgmtHelper` actions and passes arguments to that action.

Signature

```
public Object call(String action, Map<String, Object> args)
```

Parameters

`action`

Type: String

The action to call. The value must be one of the following actions:

- *`containsCardTransactions`* — Returns `true` if any transactions contain `transactionCode` values.
- *`convertUploadedDocuments`* — Converts uploaded document data to list format.
- *`createDisputeItemMerchAlert`* — Creates a merchant alert based on a Case ID for disputed transactions and batch data.
- *`deleteAssessmentResponses`* — Deletes the assessment responses related to the specified Assessment ID.
- *`filterTransactions`* — Separates transactions into different lists based on the deflection outcome.
- *`generateRequestGuid`* — Creates a GUID for the dispute request.

- *getAlertStatusDetails* — Returns merchant alert data related to the specified Case ID.
- *getDisputeBatchDetails* — Returns dispute and batch data related to the specified Case ID.
- *getPayloadForRetry* — Returns the input list in a SelectedTransactions list.
- *raiseDispute* — Assembles transaction dispute data, creates objects related to the transaction dispute, and returns summary data.
- *segregateTransactions* — Separates transactions according to the enrichment provider, either Plaid or Consumer Clarity.
- *setDisputedTransactions* — Converts transaction data in String format to a list.
- *setTransactions* — Adds enrichment provider data, either Plaid or Consumer Clarity, to the list of transactions, and cleans up errors in the data.
- *updateDisputedTransactionsAfterEnrichment* — Updates the list of disputed transactions after enrichment provider data is added.
- *validateDisputedTransactions* — Checks the disputed amounts for errors.

args

Type: Map<String, Object>

The arguments passed to the corresponding action. All actions require input, output, and options arguments, but these can be empty if the action doesn't use them. Values listed here are for the input argument.

- *containsCardTransactions*, *segregateTransactions*, *setTransactions* — Accepts a `SelectedTransactions` list.
- *convertUploadedDocuments* — Accepts uploaded document data in either List<Object> or Map<String, Object> format.
- *createDisputeItemMerchAlert* — Accepts `caseId`, `batchId`, and `batchStatus` values.
- *deleteAssessmentResponses* — Accepts an `assessmentId`.
- *filterTransactions*, *validateDisputedTransactions* — Accepts a `DisputedTransactions` list.
- *generateRequestGuid* — No input is needed.
- *getAlertStatusDetails*, *getDisputeBatchDetails* — Accepts a `caseId`.
- *getPayloadForRetry* — Accepts a list of transactions.
- *raiseDispute* — Accepts under input:
  - `AccountId`, `AssessmentId`, `FinancialAccountId`, `Type`, `SubType`, and `Description` values to be written to a Dispute object
  - `HasValidTransactions`, `HasInvalidTransactions`, `HasClearForWriteOffTransactions`, and `IsAllTransactionResolved` boolean values
  - `ResolvedTransactions` and `SelectedTransactions` lists
- *setDisputedTransactions* — Accepts `SelectedTransactions` data in either Map<String, Object> or String format.
- *updateDisputedTransactionsAfterEnrichment* — Accepts `DisputedTransactions`, `ResolvedTransactions`, and `CurrentDisputedAmount` lists.

Return Value

Type: Map<String, Object>

The return values of the corresponding action, returned in the output argument.

- *containsCardTransactions* — Returns `true` in a `containsCardTransactions` key if any transactions contain `transactionCode` values.
- *convertUploadedDocuments* — Returns uploaded document data in List<Object> format under a `Documents` key and the size of the list in a `DocumentsListSize` key.
- *createDisputeItemMerchAlert*, *deleteAssessmentResponses* — Returns no output.
- *filterTransactions* — Returns under output:
  - Transaction lists under the `DisputedTransactions`, `ValidTransactions`, `ClearForWriteOffTransactions`, and `InvalidTransactions` keys
  - `HasValidTransactions`, `HasInvalidTransactions`, and `HasClearForWriteOffTransactions` keys with values of `true` or `false`
- *generateRequestGuid* — Returns a `RequestGuid` key with a GUID for the dispute request as its value.
- *getAlertStatusDetails* — Returns a `disputesItemsMerchantAlerts` list, a `disputeItems` list, and `batchId` and `batchStatus` values.
- *getDisputeBatchDetails* — Returns `disputeId`, `batchId`, and `batchStatus` values.
- *getPayloadForRetry* — Returns the input list in a SelectedTransactions list.
- *raiseDispute* — Returns an `apiResponse` key with `caseId`, `caseNumber`, and `svcCatalogRequestId` keys under it.
- *segregateTransactions* — Returns a list of transaction data for each enrichment provider under the `PlaidTransactions` and `ConsumerClarityTransactions` keys.
- *setDisputedTransactions* — Returns a list of transaction data under the `DisputedTransactions` key.
- *setTransactions* — Returns a list of transaction data under the `DisputedTransactions` key. For each transaction, it adds a `ProviderName` to specify the enrichment provider and other merchant-related information such as `MerchantName`, `Category`, and `Address`.
- *updateDisputedTransactionsAfterEnrichment* — Returns a list of transaction data under the `DisputedTransactionsAfterEnrichment` key.
- *validateDisputedTransactions* — Returns the keys `NegativeDisputeAmountError`, `DisputeAmountGreaterError`, and `InvalidDisputeAmountError` with values of `true` or `false`.

Usage

To use this method in an Integration Procedure, specify the class in the Remote Class property, the action in the Remote Method property, and the arguments in the Additional Input property.

`getDisputeItems(caseId)`

Returns disputed transactions related to the specified Case ID. Called by the createDisputeItemMerchAlert, getAlertStatusDetails, getDisputeBatchDetails actions of the call method.

Signature

```
public static Map<String, Object> getDisputeItems(String caseId)
```

Parameters

caseId
Type: String

The ID of the Case related to the disputed transactions.

Return Value

Type: Map<String, Object>

Returns the disputed transactions related to the specified Case ID.

Example

Here is sample output. The keys correspond to DisputeItem object fields.

```
{
  "output": [
    {
      "transaction_date": "2023-01-01",
      "transaction_identifier": "1",
      "transaction_amount": 213.1,
      "transaction_description": "t1"
    },
    {
      "transaction_date": "2023-01-01",
      "transaction_identifier": "2",
      "transaction_amount": 150.94,
      "transaction_description": "t2"
    }
  ]
}
```

getEthocaAPIRequest(disputeItems, disputeType, namedCredential)

Prepares the payload used in the dispute flow and sends it to the integration provider, retrying if necessary.

Signature

```
public static HttpRequest getEthocaAPIRequest(List<DisputeItem> disputeItems, String disputeType, String namedCredential)
```

Parameters

disputeItems

Type: List<DisputeItem>

Disputed transaction data in the following JSON format:

```
[
  {
    "transaction_date": "2023-01-01",
    "transaction_identifier": "1",
    "transaction_amount": 213.1,
    "transaction_description": "t1"
  },
  {
    "transaction_date": "2023-01-01",
```

```
    "transaction_identifier": "2",
    "transaction_amount": 150.94,
    "transaction_description": "t2"
  }
]
```

The keys correspond to DisputeItem object fields.

disputeType
Type: String

A value of the Dispute object's DisputeType picklist field:

- Processing Error
- Consumer Dispute
- Fraud

namedCredential
Type: String

The named credential for accessing the integration provider.

Return Value

Type: HttpRequest

Returns an HttpRequest that includes the disputed transaction data and sends it to the integration provider, retrying if necessary.

fsccashflow Namespace

The `fsccashflow` namespace provides classes used in the FSCCashFlow Flexcards and its child Flexcards.

The `fsccashflow` namespace has these classes.

FSCCashFlowUtil Class
Use the callable FSCCashFlowUtil class to manage and validate data for party income and expense entities by passing in the action and the corresponding arguments. This class provides utility methods used in FSCCashFlow Flexcard and its child Flexcards.

FSCCashFlowUtil Class

Use the callable FSCCashFlowUtil class to manage and validate data for party income and expense entities by passing in the action and the corresponding arguments. This class provides utility methods used in FSCCashFlow Flexcard and its child Flexcards.

Namespace

fsccashflow Namespace

Usage

The Financial Goals FlexCards use Integration Procedures that call the FSCHouseholdService class. These FlexCards display information about Financial Goals.

FSCCashFlowUtil Methods

FSCCashFlowUtil Methods

The `FSCCashFlowUtil` has these methods.

GetPartyIncomeFrequencyLabel
Returns the picklist values for the party income frequency field on the party income entity.

GetPartyIncomeTypeLabel
Returns the picklist values for the party income type field on the party income entity.

GetPartyIncomeStatusLabel
Returns the picklist values for the party income status field on the party income entity.

CalculateIncomeExpenseSummary
Calculates the monthly income, total income, average monthly income, monthly expense, total expense, average monthly expense from a list of income and expenses provided.

GetPartyExpenseFrequencyLabel
Returns the picklist values for the party expense frequency field on the party expense entity.

GetPartyExpenseTypeLabel
Returns the picklist values for the party expense type field on the party expense entity.

GetPartyExpenseStatusLabel
Returns the picklist values for the party expense status field on the party expense entity.

PerformIncomeValidation
Performs validations on Party Income records. Ensure that the start date is not earlier than the end date.

PerformExpenseValidation
Performs validations on Party Income records.

GetDurationDateRange
Returns the start and end date given a duration.For example, if you input the number 3 on the date 10/29/2024, it will return a start date of 7/1/2024 and an end date of 10/1/2024.

HandleUpsertError
Helper method that constructs the error response for upsert of a partyIncome or partyExpense record.

CheckReadAccess
Checks for read access on the partyIncome and partyExpense entities.

CheckCrudOnIncome
Checks create, update and delete access on partyIncome entity.

CheckCrudOnExpense
Checks create, update and delete access on partyExpense entity.

`GetPartyIncomeFrequencyLabel`

Returns the picklist values for the party income frequency field on the party income entity.

Signature

```
call(String action, Map<String, Object> args
```

Return Value

Returns a list of picklist labels for Party Income frequency.

`GetPartyIncomeTypeLabel`

Returns the picklist values for the party income type field on the party income entity.

Signature

```
call(String action, Map<String, Object> args
```

Return Value

Returns a list of picklist labels for Party Income type.

`GetPartyIncomeStatusLabel`

Returns the picklist values for the party income status field on the party income entity.

Signature

```
call(String action, Map<String, Object> args
```

Return Value

Returns a list of picklist labels for Party Income status.

`CalculateIncomeExpenseSummary`

Calculates the monthly income, total income, average monthly income, monthly expense, total expense, average monthly expense from a list of income and expenses provided.

Signature

```
call(String action, Map<String, Object> args
```

Return Value

Returns income and expense details.

Examples

Input and output JSON example of the actions are as follows.

Input format:

```
[
    {
        "Duration": "12",
        "PartyExpenseList": [
            {
                "Name": "PE-0000000004",
                "UsageType": "CashFlow",
                "RecurrenceInterval": "Monthly",
                "Type": "Child Care",
                "Id": "2n3SG000007dkzpYAA",
                "TotalAmount": 999.99,
                "PartyId": "001SG000004TCczYAG",
                "Status": "Active",
                "StartDate": "2024-01-29T08:00:00.000Z"
            }
        ],
        "PartyIncomeList": [
            {
                "Name": "PI-0000000003",
                "UsageType": "CashFlow",
                "IncomeFrequency": "Monthly",
                "IncomeType": "Salary",
                "Id": "2m3SG000007dkzpYAA",
                "IncomeAmount": 999.99,
                "PartyId": "001SG000004TCczYAG",
                "IncomeStatus": "Active",
                "StartDate": "2024-01-29T08:00:00.000Z"
            }
        ]
    }
]
```

Output format:

```
[
    {
        "MonthlyIncome": {
            "Nov 2023": 0,
            "Aug 2024": 999.99,
            "Oct 2023": 0,
            "Jan 2024": 96.7732258064516,
            "Mar 2024": 999.99,
            "Jul 2024": 999.99,
            "Apr 2024": 999.99,
            "Dec 2023": 0,
            "Jun 2024": 999.99,
            "Sep 2024": 999.99,
            "Feb 2024": 999.99,
            "May 2024": 999.99
        },
        "MonthlyExpense": {
            "Nov 2023": 0,
            "Aug 2024": 999.99,
```

```
            "Oct 2023": 0,
            "Jan 2024": 96.7732258064516,
            "Mar 2024": 999.99,
            "Jul 2024": 999.99,
            "Apr 2024": 999.99,
            "Dec 2023": 0,
            "Jun 2024": 999.99,
            "Sep 2024": 999.99,
            "Feb 2024": 999.99,
            "May 2024": 999.99
        },
        "AvgMonthlyExpense": 674.72,
        "TotalIncome": 8096.69,
        "TotalSurplus": 0,
        "AvgMonthlyIncome": 674.72,
        "AvgMonthlySurplus": 0,
        "TotalExpense": 8096.69
    }
]
```

GetPartyExpenseFrequencyLabel

Returns the picklist values for the party expense frequency field on the party expense entity.

Signature

```
call(String action, Map<String, Object> args
```

Return Value

Returns a list of picklist labels for Party Expense frequency.

GetPartyExpenseTypeLabel

Returns the picklist values for the party expense type field on the party expense entity.

Signature

```
call(String action, Map<String, Object> args
```

Return Value

Returns a list of picklist labels for Party Expense type.

GetPartyExpenseStatusLabel

Returns the picklist values for the party expense status field on the party expense entity.

Signature

```
call(String action, Map<String, Object> args
```

Return Value

Returns a list of picklist labels for Party Expense status.

`PerformIncomeValidation`

Performs validations on Party Income records. Ensure that the start date is not earlier than the end date.

Signature

```
call(String action, Map<String, Object> args
```

Return Value

Returns a list of picklist labels for Party Income type.

Examples

Input and output JSON example of the actions are as follows.

Input format:

```
[
    {
        "IncomeFrequency": "Weekly",
        "IncomeFrequencyLabelObject": {
            "value": "Weekly",
            "label": "Weekly"
        },
        "MemberOptionsList": [
            {
                "value": "001OG00000xx6gAYAQ",
                "label": "Okee PA"
            },
            {
                "value": "id2",
                "label": "Name2"
            }
        ],
        "IsHousehold": true,
        "IncomeAmount": 100,
        "IncomeStatusOptions": [
            {
                "value": "Active",
                "label": "Active"
            },
            {
                "value": "Inactive",
                "label": "Inactive"
            }
        ],
        "PartyId": "001OG00000xx6gAYAQ",
        "IncomeStatus": "Active",
        "Party": {
            "Name": "Okee PA",
```

```
            "Id": "001OG00000xx6gAYAQ"
        },
        "IncomeTypeOptions": [
            {
                "value": "Salary",
                "label": "Salary"
            },
            {
                "value": "Commission",
                "label": "Commission"
            },
            {
                "value": "Fees",
                "label": "Fees"
            },
            {
                "value": "Rent",
                "label": "Rent"
            }
        ],
        "StartDate": "2024-02-02T00:00:00.000Z",
        "Name": "PI-0000000009",
        "FrequencyOptions": [
            {
                "value": "Weekly",
                "label": "Weekly"
            },
            {
                "value": "Monthly",
                "label": "Monthly"
            },
            {
                "value": "Yearly",
                "label": "Yearly"
            }
        ],
        "UsageType": "CashFlow",
        "IncomeId": "2m3OG000000009xxAQ",
        "IsPersonAccount": false,
        "IncomeTypeLabelObject": {
            "value": "Salary",
            "label": "Salary"
        }
    }
]
```


Output format:


```
[
    {
        "dateErrorMessage": null,
        "IncomeFrequency": "Weekly",
        "IncomeFrequencyLabelObject": {
            "value": "Weekly",
            "label": "Weekly"
```

```
        },
        "MemberOptionsList": [
            {
                "value": "001OG000003f6gAYAQ",
                "label": "Okee PA"
            },
            {
                "value": "id2",
                "label": "Name2"
            }
        ],
        "requiredFieldErrorMessage": "Required fields:Type",
        "IsHousehold": true,
        "IncomeAmount": 100,
        "PartyId": "001OG000003f6gAYAQ",
        "IncomeStatusOptions": [
            {
                "value": "Active",
                "label": "Active"
            },
            {
                "value": "Inactive",
                "label": "Inactive"
            }
        ],
        "Party": {
            "Name": "Okee PA",
            "Id": "001OG000003f6gAYAQ"
        },
        "IncomeStatus": "Active",
        "hasUpsertError": false,
        "IncomeTypeOptions": [
            {
                "value": "Salary",
                "label": "Salary"
            },
            {
                "value": "Commission",
                "label": "Commission"
            },
            {
                "value": "Fees",
                "label": "Fees"
            },
            {
                "value": "Rent",
                "label": "Rent"
            }
        ],
        "StartDate": "2024-02-02T00:00:00.000Z",
        "Name": "PI-0000000009",
        "FrequencyOptions": [
            {
                "value": "Weekly",
```

```
                "label": "Weekly"
            },
            {
                "value": "Monthly",
                "label": "Monthly"
            },
            {
                "value": "Yearly",
                "label": "Yearly"
            }
        ],
        "UsageType": "CashFlow",
        "IncomeId": "2m3OG000000009IYAQ",
        "IsPersonAccount": false,
        "IncomeTypeLabelObject": {
            "value": "Salary",
            "label": "Salary"
        }
    }
]
```

`PerformExpenseValidation`

Performs validations on Party Income records.

Signature

```
call(String action, Map<String, Object> args
```

Return Value

Returns a list of picklist labels for Party Income frequency.

Examples

Output JSON example of the actions are as follows.

Output format:

```
{
    "Required fields": "Expense Type, Member, Amount, Start Date, Frequency"
}
```

`GetDurationDateRange`

Returns the start and end date given a duration.For example, if you input the number 3 on the date 10/29/2024, it will return a start date of 7/1/2024 and an end date of 10/1/2024.

Signature

```
call(String action, Map<String, Object> args
```

Return Value

Returns the start and end date for a specified duration.

Examples

Output JSON example of the actions are as follows.

Output format:

```
{
          "DurationStartDate": "2024-02-02T00:00:00.000Z",
          "DurationEndDate": "2024-05-02T00:00:00.000Z"
        }
```

HandleUpsertError

Helper method that constructs the error response for upsert of a partyIncome or partyExpense record.

Signature

```
call(String action, Map<String, Object> args
```

Return Value

Returns a list of errors encountered while upserting the record in the database.

Examples

Input and output JSON example of the action are as follows.

Input format:

```
[
    {
        "Name": "PI-0000000003",
        "UsageType": "CashFlow",
        "IncomeFrequency": "Monthly",
        "IncomeType": "Salary",
        "Id": "2m3SG000007dkxxYAA",
        "IncomeAmount": 999.99,
        "PartyId": "001SG000004TCxxYAG",
        "IncomeStatus": "Active",
        "StartDate": "2024-01-29T08:00:00.000Z"
    }
]
```

Output format:

```
[ { "UpsertError‟: "Invalid Id‟ } ]
```

CheckReadAccess

Checks for read access on the partyIncome and partyExpense entities.

Signature

```
call(String action, Map<String, Object> args
```

Return Value

Returns True or False based on whether read access is granted or not.

Examples

Output JSON example of the action are as follows.

Output format:

```
{ "isAccessible" : "true" }
```

`CheckCrudOnIncome`

Checks create, update and delete access on partyIncome entity.

Signature

```
call(String action, Map<String, Object> args
```

Return Value

Returns True or False based on whether create, update and delete access on the partyIncome entity is given.

Examples

Output JSON example of the action are as follows.

Output format:

```
{ "isCreatable" : "true", "isUpdateable" : "true", "isDeletable": "true" }
```

`CheckCrudOnExpense`

Checks create, update and delete access on partyExpense entity.

Signature

```
call(String action, Map<String, Object> args
```

Return Value

Returns True or False based on whether create, update and delete access on the partyExpense entity is given.

Examples

Output JSON example of the action are as follows.

Output format:

```
{ "isCreatable" : "true", "isUpdateable" : "true", "isDeletable": "true" }
```

fsccomplaintmanagement Namespace

The `fsccomplaintmanagement` namespace classes provide data helper functions for use in complaint management.

Note: The fsccomplaintmanagement namespace cannot be used in DML operations.

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

ComplaintMgmtHelper Class
Use the callable ComplaintMgmtHelper class to provide data helper functions for use in the Complaint Management OmniScript.

AssessmentHelperFunction Class
Use the callable AssessmentHelperFunction class to provide helper functions for assessment data to use in complaint management.

ComplaintMgmtHelper Class

Use the callable ComplaintMgmtHelper class to provide data helper functions for use in the Complaint Management OmniScript.

Namespace

fsccomplaintmanagement

ComplaintMgmtHelper Methods
The following are methods for `ComplaintMgmtHelper`.

ComplaintMgmtHelper Methods

The following are methods for `ComplaintMgmtHelper`.

`ComplaintMgmtHelper` is a callable class. Its only method is `call`.

call(action, args)
This method calls one of the available `ComplaintMgmtHelper` actions and passes arguments to that action.

`call(action, args)`

This method calls one of the available `ComplaintMgmtHelper` actions and passes arguments to that action.

Signature

```
public Object call(String action, Map<String, Object> args)
```

Parameters

action
Type: String

The action to call. The value must be one of the following actions:

- *callCreateComplaintApi* — Prepares data for and calls the ConnectApi.ComplaintMgmtRequestInputRepresentation method and its sub-representations.
- *convertUploadedDocuments* — Converts uploaded document data to list format.
- *getBasePath* — Returns the URL path prefix of the current site or an empty string if none. See getPathPrefix().
- *sortList* — Sorts a list.
- *validateTimeRange* — Checks if the start time is before the end time.

args
Type: Map<String, Object>

The arguments passed to the corresponding action. All actions require input, output, and options arguments, but these can be empty if the action doesn't use them. Values listed here are for the input argument.

- *callCreateComplaintApi* — Accepts data in these keys: AccountId, arguments, AssessmentId, AuthorizationProof, CaseReason, Description, Documents, Email, FinAccountsMasterList, FinancialAccount, FromTime, ParticipantId, PreferredCommunicationMode, Priority, ProductType, ShouldInclInRegulatoryRpt, SourceType, Status, Subject, SubType, TillTime, Type.
- *convertUploadedDocuments* — Accepts uploaded document data in either List<Object> or Map<String, Object> format.
- *getBasePath* — No input is needed.
- *sortList* — Accepts a list in List<Object> or String format under an unorderedList key.
- *validateTimeRange* — Accepts start and end times in FromTime and TillTime keys.

Return Value

Type: Map<String, Object>

The return values of the corresponding action, returned in the output argument.

- *callCreateComplaintApi* — Returns data in a result key with these keys under it: caseId, caseNumber, and publicComplaintId.
- *convertUploadedDocuments* — Returns uploaded document data in List<Object> format under a Documents key and the size of the list in a DocumentsListSize key.
- *getBasePath* — Returns the URL path prefix of the current site in a BasePath key.
- *sortList* — Returns a sorted list under a sortedList key.
- *validateTimeRange* — Returns a result key with a value of Valid or Invalid.

Usage

To use this method in an Integration Procedure, specify the class in the Remote Class property, the action in the Remote Method property, and the arguments in the Additional Input property.

AssessmentHelperFunction Class

Use the callable AssessmentHelperFunction class to provide helper functions for assessment data to use in complaint management.

Namespace

fsccomplaintmanagement

AssessmentHelperFunction Methods

The following are methods for `AssessmentHelperFunction`.

AssessmentHelperFunction Methods

The following are methods for `AssessmentHelperFunction`.

`AssessmentHelperFunction` is a callable class. Its only method is `call`.

call(action, args)

This method calls one of the available `AssessmentHelperFunction` actions and passes arguments to that action.

`call(action, args)`

This method calls one of the available `AssessmentHelperFunction` actions and passes arguments to that action.

Signature

```
public Object call(String action, Map<String, Object> args)
```

Parameters

`action`

Type: String

The action to call. The only action is deleteAssessmentResponses.

- *`deleteAssessmentResponses`* — Deletes the Assessment object with the specified Assessment ID along with all the related assessment responses.

`args`

Type: Map<String, Object>

The arguments passed to the corresponding action. All actions require input, output, and options arguments, but these arguments can be empty if the action doesn't use them. Values listed here are for the input argument.

- *`deleteAssessmentResponses`* — Accepts an AssessmentId.

Return Value

Type: Map<String, Object>

The return values of the corresponding action, returned in the output argument.

- *`deleteAssessmentResponses`* — Returns null.

Usage

To use this method in an Integration Procedure, specify the class in the Remote Class property, the action in the Remote Method property, and the arguments in the Additional Input property.

fschousehold Namespace

The `fschousehold` namespace provides classes used in the Financial Goals and Plans FlexCards.

Note: The fschousehold namespace cannot be used in DML operations.

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

FSCFinancialAccountService Class
Use the callable FSCFinancialAccountService class to return `true` if the FinancialAccountMgmtPref permission is enabled in the org.

FSCGoalService Class
Use the callable FSCGoalService class to return either picklist values of a Financial Goal object or `true` if the user has Create, Edit, or Delete access to the FinancialGoal object.

FSCHouseholdService Class
Use the callable FSCHouseholdService class to accept a Person Account ID corresponding to a member of a Household and return the other Household members.

FSCPlansAndGoalsUtil Class
The FSCPlansAndGoalsUtil class provides utilities to the other Apex classes in the `fschousehold` namespace.

FSCPlanService Class
Use the callable FSCPlanService class to return picklist values of a Financial Plan object.

RetrievalSummaryDataRefresh Class
Use the callable RetrievalSummaryDataRefresh wrapper class to refresh retrieval summary definition associated rollups.

FSCFinancialAccountService Class

Use the callable FSCFinancialAccountService class to return `true` if the FinancialAccountMgmtPref permission is enabled in the org.

Namespace

fschousehold

Usage

The Financial Goals FlexCards use Integration Procedures that call the FSCFinancialAccountService class. These FlexCards display information about Financial Goals.

FSCFinancialAccountService Methods
The following are methods for `FSCFinancialAccountService`.

FSCFinancialAccountService Methods

The following are methods for `FSCFinancialAccountService`.

FSCFinancialAccountService is a callable class. Its only method is `call`.

call(action, args)
This method calls one of the available FSCFinancialAccountService actions and passes arguments to that action.

`call(action, args)`

This method calls one of the available FSCFinancialAccountService actions and passes arguments to that action.

API Version

60.0

Signature

```
public Object call(String action, Map<String, Object> args)
```

Parameters

`action`
Type: String

The action to call. The value must be one of the following action names:

- *`isFinancialAccountMgmtPrefEnabled`* — Returns `true` if the FinancialAccountMgmt permission is enabled in the org.

`args`
Type: Map<String, Object>

The first three keys must be input, output, and options. The required keys under input depend on the method the action invokes. None of the actions require input, so for all actions, provide empty input, output, and options keys.

Return Value

Type: Map<String, Object>

The return values of the corresponding action. See the parameter descriptions.

Usage

To use this method in an Integration Procedure, specify the class in the Remote Class property, the action in the Remote Method property, and the arguments in the Additional Input property.

FSCGoalService Class

Use the callable FSCGoalService class to return either picklist values of a Financial Goal object or `true` if the user has Create, Edit, or Delete access to the FinancialGoal object.

Namespace

fschousehold

Usage

The Financial Goals FlexCards use OmniScripts and Integration Procedures that call the FSCGoalService class. These FlexCards display information about Financial Goals.

FSCGoalService Methods
The following are methods for `FSCGoalService`.

FSCGoalService Methods

The following are methods for `FSCGoalService`.

FSCGoalService is a callable class. Its only method is `call`.

call(action, args)
This method calls one of the available FSCGoalService actions and passes arguments to that action.

`call(action, args)`

This method calls one of the available FSCGoalService actions and passes arguments to that action.

API Version

59.0

Signature

```
public Object call(String action, Map<String, Object> args)
```

Parameters

`action`
Type: String

The action to call. The value must be one of the following action names:

- *`FinancialGoalPriority`* — Returns the Priority picklist values of a Financial Goal.
- *`FinancialGoalStatus`* — Returns the Status picklist values of a Financial Goal.
- *`FinancialGoalFrequency`* (API version 60.0) — Returns the Frequency picklist values of a Financial Goal.
- *`hasCreateAccessFinancialGoal`* (API version 60.0) — Returns `true` if the user has Create access to the FinancialGoal object in their User Profile Standard Object Permissions.
- *`hasEditAccessFinancialGoal`* (API version 60.0) — Returns `true` if the user has Edit access to the FinancialGoal object in their User Profile Standard Object Permissions.
- *`hasDeleteAccessFinancialGoal`* (API version 60.0) — Returns `true` if the user has Delete access to the FinancialGoal object in their User Profile Standard Object Permissions.

`args`
Type: Map<String, Object>

The first three keys must be input, output, and options. The required keys under input depend on the method the action invokes. None of the actions require input, so for all actions, provide empty input, output, and options keys.

Return Value

Type: Map<String, Object>

The return values of the corresponding action. See the parameter descriptions.

Usage

To use this method in an Integration Procedure, specify the class in the Remote Class property, the action in the Remote Method property, and the arguments in the Additional Input property.

FSCHouseholdService Class

Use the callable FSCHouseholdService class to accept a Person Account ID corresponding to a member of a Household and return the other Household members.

Namespace

fschousehold

Usage

The Financial Goals FlexCards use Integration Procedures that call the FSCHouseholdService class. These FlexCards display information about Financial Goals.

FSCHouseholdService Methods
The following are methods for `FSCHouseholdService`.

FSCHouseholdService Methods

The following are methods for `FSCHouseholdService`.

FSCHouseholdService is a callable class. Its only method is `call`.

call(action, args)
This method calls one of the available FSCHouseholdService actions and passes arguments to that action.

`call(action, args)`

This method calls one of the available FSCHouseholdService actions and passes arguments to that action.

API Version

59.0

Signature

```
public Object call(String action, Map<String, Object> args)
```

Parameters

action
Type: String

The action to call. The value must be one of the following action names:

- *getAllMembersOfAHousehold* — Accepts the accountId of a Person Account corresponding to a member of a Household and returns the other Household members.

args
Type: Map<String, Object>

The first three keys must be input, output, and options. The required keys under input depend on the method the action invokes. All actions require input, output, and options arguments, but these can be empty if the action doesn't use them.

- *getAllMembersOfAHousehold*
  - *input* — Wrap the following arguments inside the input argument.
    - *accountId* — Maps to the accountId argument of the action being called.

Return Value

Type: Map<String, Object>

The return values of the corresponding action:

- *getAllMembersOfAHousehold* — Returns all members of the Household.

Usage

To use this method in an Integration Procedure, specify the class in the Remote Class property, the action in the Remote Method property, and the arguments in the Additional Input property.

FSCPlansAndGoalsUtil Class

The FSCPlansAndGoalsUtil class provides utilities to the other Apex classes in the `fschousehold` namespace.

Namespace

fschousehold

FSCPlansAndGoalsUtil Methods

The following are methods for `FSCPlansAndGoalsUtil`.

FSCPlansAndGoalsUtil Methods

The following are methods for `FSCPlansAndGoalsUtil`.

Methods of other classes in the `fschousehold` namespace call methods in this class.

getOrganizationId()

This method returns the Org ID as a String.

getPicklist(objectName, fieldName)

This method accepts an object name and picklist field and returns the picklist values.

isOrgPreferenceEnabled(orgId, orgPreference)

This method accepts Org ID and Org Preference values and returns `true` if the preference or permission is enabled in the org.

`getOrganizationId()`

This method returns the Org ID as a String.

API Version

60.0

Signature

```
public static String getOrganizationId()
```

Parameters

None

Return Value

Type: String

Returns the org ID.

`getPicklist(objectName, fieldName)`

This method accepts an object name and picklist field and returns the picklist values.

API Version

60.0

Signature

```
public static List<Map<String, String>> getPicklist(String objectName, String fieldName)
```

Parameters

`objectName`

Type: String

The name of the object that contains the picklist field.

`fieldName`

Type: String

The name of the picklist field.

Return Value

Type: List<Map<String, String>>

Returns the values of the specified picklist field.

`isOrgPreferenceEnabled(orgId, orgPreference)`

This method accepts Org ID and Org Preference values and returns `true` if the preference or permission is enabled in the org.

API Version

60.0

Signature

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

Parameters

`orgId`
Type: String

The ID of the org.

`orgPreference`
Type: String

The name of the org preference or permission.

Return Value

Type: Boolean

Returns `true` if the preference or permission is enabled in the org.

FSCPlanService Class

Use the callable FSCPlanService class to return picklist values of a Financial Plan object.

Namespace

fschousehold

Usage

The Financial Plans FlexCards use Integration Procedures that call the FSCPlanService class. These FlexCards display information about Financial Plans.

FSCPlanService Methods
The following are methods for `FSCPlanService`.

FSCPlanService Methods

The following are methods for `FSCPlanService`.

FSCPlanService is a callable class. Its only method is `call`.

call(action, args)
This method calls one of the available FSCPlanService actions and passes arguments to that action.

`call(action, args)`

This method calls one of the available FSCPlanService actions and passes arguments to that action.

API Version

60.0

Signature

```
public Object call(String action, Map<String, Object> args)
```

Parameters

`action`
Type: String

The action to call. The value must be one of the following action names:

- *`FinancialPlanStatus`* — Returns the Status picklist values of a Financial Plan.
- *`FinancialPlanType`* — Returns the Type picklist values of a Financial Plan.
- *`IsOnDemandRollupRefreshEnabled`* — Returns the boolean value which represent whether on demand data refresh is enabled or not.

`args`
Type: Map<String, Object>

The first three keys must be input, output, and options. The required keys under input depend on the method the action invokes. None of the actions require input, so for all actions, provide empty input, output, and options keys.

Return Value

Type: Map<String, Object>

The return values of the corresponding action. See the parameter descriptions.

Usage

To use this method in an Integration Procedure, specify the class in the Remote Class property, the action in the Remote Method property, and the arguments in the Additional Input property.

RetrievalSummaryDataRefresh Class

Use the callable RetrievalSummaryDataRefresh wrapper class to refresh retrieval summary definition associated rollups.

Namespace

fschousehold

Example

Refresh rollups that're associated with a retrieval summary definition.

- Invoke sync.

```
Map<String, Object> args = new Map<String, Object>();
Map<String, String> input = new Map<String, String>();
Map<String, Object> output = new Map<String, Object>();
input.put('AccountId', '001SG00000iDsGQYA0');
input.put('RetrievalSummaryDefinitionDeveloperName', 'HouseholdAPIForWealthManagement');
args.put('input', input);
args.put('output', output);
fschousehold.RetrievalSummaryDataRefresh dataRefreshWrapper = new
fschousehold.RetrievalSummaryDataRefresh();
dataRefreshWrapper.call('refreshRetrievalSummaryData', args);
System.debug(output);
```

- Get the last refresh details of the record rollups.

```
Map<String, Object> args = new Map<String, Object>();
Map<String, String> input = new Map<String, String>();
Map<String, Object> output = new Map<String, Object>();
input.put('AccountId', '001SG00000iDsGQYA0');
input.put('RetrievalSummaryDefinitionDeveloperName', 'HouseholdAPIForWealthManagement');
args.put('input', input);
args.put('output', output);
fschousehold.RetrievalSummaryDataRefresh dataRefreshWrapper = new
fschousehold.RetrievalSummaryDataRefresh();
dataRefreshWrapper.call('fetchLastRefreshDetails', args);
System.debug(output);
```

RetrievalSummaryDataRefresh Methods
RetrievalSummaryDataRefresh is a callable class. Its only method is call.

RetrievalSummaryDataRefresh Methods

RetrievalSummaryDataRefresh is a callable class. Its only method is call.

The `RetrievalSummaryDataRefresh` class includes the `call` method.

call(action, args)
This method calls one of the available RetrievalSummaryDataRefresh actions and passes arguments to that action.

`call(action, args)`

This method calls one of the available RetrievalSummaryDataRefresh actions and passes arguments to that action.

Signature

```
public Map<String,Object> call(String action, Map<String,Object> args)
```

```
fschousehold.RetrievalSummaryDataRefresh, call, [String, Map<String,ANY>], Map<String,ANY>
```

Parameters

action

Type: String

The action to call. The value must be one of these action names:

- `refreshRetrievalSummaryData`—Refreshes the data of the retrieval summary definition name and account ID.
- `fetchLastRefreshDetails`—Fetches the last refresh date of the retrieval summary definition name and account ID.

args

Type: Map<String, Object>

The first three keys must be input, output, and options. The required keys under input depend on the method the action invokes. None of the actions require input, so for all actions, provide empty input, output, and options keys. Input and output are required. Input must have `AccountId` and `RetrievalSummaryDefinitionDeveloperName`. The output can be empty, but it can't be null.

Return Value

Type: Map<String, Object>

The return values of the corresponding action. See the parameter descriptions.

Usage

To use this method in an Integration Procedure, specify the class in the Remote Class property, the action in the Remote Method property, and the arguments in the Additional Input property.

fscserviceprocesses Namespace

The `fscserviceprocesses` namespace provides classes used in Service Process OmniScripts.

Note: The fscserviceprocesses namespace cannot be used in DML operations.

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

AddressUpdateHelperFunctions Class

The callable AddressUpdateHelperFunctions class provides data conversion functions for use in the Change Address OmniScript.

FeeReversalHelperFunctions Class

The callable FeeReversalHelperFunctions class provides data conversion functions for use in the Fee Reversal OmniScript. This class accepts a list of transactions from the related Fee Reversal Case Object and the corresponding Fee Reversal amounts as inputs and calls the Fee Reversal Mule API endpoint.

AddressUpdateHelperFunctions Class

The callable AddressUpdateHelperFunctions class provides data conversion functions for use in the Change Address OmniScript.

Namespace

fscserviceprocesses

Usage

The AddressUpdateHelperFunctions class is a helper function for the GET and POST methods of the SvcCatalogRequest Connect API. The Change Address OmniScript calls Integration Procedures that call the AddressUpdateHelperFunctions methods via Remote Actions.

AddressUpdateHelperFunctions Methods

AddressUpdateHelperFunctions Methods

The following are methods for `AddressUpdateHelperFunctions`.

call(action, args)
This method calls one of the available AddressUpdateHelperFunctions actions and passes arguments to that action.

`call(action, args)`

This method calls one of the available AddressUpdateHelperFunctions actions and passes arguments to that action.

Signature

```
public Object call(String action, Map<String, Object> args)
```

Parameters

`action`
Type: String

The action to call. The value must be one of the following:

- *`getAddressUpdateAttrs`* — Fetches the list of Service Process attributes for the Address Update request.
- *`convertArrayToKeyValuePairs`* — Converts the formats of Financial Account numbers.
- *`ConvertToList`* — Converts document type data to list format.
- *`convertAndMergeAccounts`* — Converts Financial Account data to list format.
- *`convertUploadedDocuments`* — Converts uploaded files metadata json for OS.
- *`ifUploadContainsMultipleFiles`* — Indicates if a single file input element in OS contains multiple uploads.
- *`convertAddresses`* — Converts the account level addresses to consumable format for the OmniScript.
- *`callCreateCaseApi`* — Creates a new Case and a related Service Process record with the address data.

`args`
Type: Map<String, Object>

The first three keys must be input, output, and options. The required content for each depends on the action:

- `getAddressUpdateAttrs`
  - String svcCatalogRequestId — Id of the request created using the Address Update OmniScript.
- `convertArrayToKeyValuePairs`
  - List<Object> financialAccountsObj — List of financial account objects for transformation.
- `ConvertToList`
  - Object args — String of comma-separated document types.
- `convertAndMergeAccounts`
  - List<Object> args — list of financial accounts.
- `convertUploadedDocuments`
  - List<Object> args — list of uploaded documents from the OmniScript data.
- `ifUploadContainsMultipleFiles`
  - List<Object> args — list of uploaded documents from the OmniScript data.
- `convertAddresses`
  - Map<String,Object> args — Account level addresses.
- `callCreateCaseApi`
  - Map<String,Object>

Return Value

Type: Map<String, Object>

The return values of the corresponding action.

Usage

To use this class in an Integration Procedure, specify the class in the Remote Class property, the action in the Remote Method property, and the arguments in the Additional Input property.

Examples

Input and output JSON examples for some of the actions are as follows.

`convertArrayToKeyValuePairs`

Input format:

```
[
    {
      "AccountName": "Priority Checking",
      "Address1": "33 Ridgemond Street",
      "City": "San Fransisco",
      "FinancialAccountId": "a0FRN000000Dt6C2AS",
      "PostalCode": "512534",
      "Country": "United States",
```

```
      "State": "CA",
      "FinancialAccountNumber": "700021878"
    },
    {
      "AccountName": "Cash Rewards Credit Card",
      "Address1": "91 Town Road",
      "City": "Naples",
      "FinancialAccountId": "a0FRN000000Dt7Z2AS",
      "PostalCode": "514534",
      "Country": "United State",
      "State": "Florisa",
      "FinancialAccountNumber": "78000130"
    },
    {
      "AccountName": "Regular Savings",
      "Address1": "33 Ridgemond Street",
      "City": "San Fransisco",
      "FinancialAccountId": "a0FRN000000Dt7U2AS",
      "PostalCode": "51345",
      "Country": "United States",
      "State": "CA",
      "FinancialAccountNumber": "200048376"
    }
]
```

Output format:

```
[
    {
      "isSelected": null,
      "ConvertedFinancialAccountNumber": "1878",
      "FinancialAccountNumber": "700021878",
      "State": "CA",
      "Country": "United States",
      "PostalCode": "512534",
      "FinancialAccountId": "a0FRN000000Dt6C2AS",
      "City": "San Fransisco",
      "Address1": "33 Ridgemond Street",
      "AccountName": "Priority Checking"
    },
    {
      "isSelected": null,
      "ConvertedFinancialAccountNumber": "0130",
      "FinancialAccountNumber": "78000130",
      "State": "Florisa",
      "Country": "United State",
      "PostalCode": "514534",
      "FinancialAccountId": "a0FRN000000Dt7Z2AS",
      "City": "Naples",
      "Address1": "91 Town Road",
      "AccountName": "Cash Rewards Credit Card"
    },
    {
      "isSelected": null,
      "ConvertedFinancialAccountNumber": "8376",
```

```
      "FinancialAccountNumber": "200048376",
      "State": "CA",
      "Country": "United States",
      "PostalCode": "51345",
      "FinancialAccountId": "a0FRN000000Dt7U2AS",
      "City": "San Fransisco",
      "Address1": "33 Ridgemond Street",
      "AccountName": "Regular Savings"
    }
]
```

convertAndMergeAccounts

Input format:

```
[
    {
      "Id": "REC0",
      "isSelected": true,
      "ConvertedFinancialAccountNumber": "1878",
      "FinancialAccountNumber": "700021878",
      "State": "CA",
      "Country": "United States",
      "PostalCode": "512534",
      "FinancialAccountId": "a0FRN000000Dt6C2AS",
      "City": "San Fransisco",
      "Address1": "33 Ridgemond Street",
      "AccountName": "Priority Checking",
      "uniqueKey": "REC0",
      "_flex": {
        "uniqueKey": "REC0"
      }
    },
    {
      "Id": "REC1",
      "isSelected": true,
      "ConvertedFinancialAccountNumber": "0130",
      "FinancialAccountNumber": "78000130",
      "State": "Florisa",
      "Country": "United State",
      "PostalCode": "514534",
      "FinancialAccountId": "a0FRN000000Dt7Z2AS",
      "City": "Naples",
      "Address1": "91 Town Road",
      "AccountName": "Cash Rewards Credit Card",
      "uniqueKey": "REC1",
      "_flex": {
        "uniqueKey": "REC1"
      }
    }
  ]
```

Output format:

```
[
    "700021878",
```

```
    "78000130"
]
```

convertAddresses

Input format:

```
{
    "Name": "Julia Green",
    "ShippingAddress": "33 Ridgemond Street,San Fransisco,CA,613654,United States",
    "BillingAddress": "33 Ridgemond Street,San Fransisco,CA,67136,United States"
}
```

Output format:

```
[
    {
      "isSelected": null,
      "type": "Shipping",
      "Address": "33 Ridgemond Street San Fransisco CA 613654 United States"
    },
    {
      "isSelected": null,
      "type": "Billing",
      "Address": "33 Ridgemond Street San Fransisco CA 67136 United States"
    }
]
```

convertUploadedDocuments

Input format:

```
[
  {
    "DocumentType-Block": {
      "DocumentType": "Passport"
    },
    "Files": [
      {
        "data": "069RN00000033O1YAI",
        "filename": "Passport.pdf",
        "vId": "068RN00000038q3YAA",
        "size": 5385,
        "deleteLabel": "Delete Passport.pdf"
      }
    ]
  },
  {
    "DocumentType-Block": {
      "DocumentType": "Medicard"
    },
    "Files": [
      {
        "data": "069RN00000033O6YAI",
        "filename": "Passport.pdf",
        "vId": "068RN00000038q8YAA",
        "size": 5385,
```

```
        "deleteLabel": "Delete Passport.pdf"
      }
    ]
  }
]
```

Output format:

```
[
  {
    "typeId": "0deRN000000009UYAQ",
    "docType": "Passport",
    "name": "Passport.pdf",
    "id": "069RN00000033O1YAI"
  },
  {
    "typeId": "0deRN00000000CnYAI",
    "docType": "Medicard",
    "name": "Passport.pdf",
    "id": "069RN00000033O6YAI"
  }
]
```

ifUploadContainsMultipleFiles

Input format:

```
[
  {
    "DocumentType-Block": {
      "DocumentType": "Passport"
    },
    "Files": [
      {
        "data": "069RN00000033O1YAI",
        "filename": "Passport.pdf",
        "vId": "068RN00000038q3YAA",
        "size": 5385,
        "deleteLabel": "Delete Passport.pdf"
      }
    ]
  },
  {
    "DocumentType-Block": {
      "DocumentType": "Medicard"
    },
    "Files": [
      {
        "data": "069RN00000033O6YAI",
        "filename": "Passport.pdf",
        "vId": "068RN00000038q8YAA",
        "size": 5385,
        "deleteLabel": "Delete Passport.pdf"
      }
    ]
```

```
  }
]
```

Output format: None

callCreateCaseApi

The input map contains these key-value pairs:

```
AddressLine1 (String): "32 baker street"
AddressLine2 (String): "abc"
PostalCode: 63164
City: "San Francisco"
State: "CA"
CountryCode: "United States"
accountId: "001RN0000037rzqYAA"
effectiveDate: "2022-12-31"
svcCatalogItemDefApiName: "AddressUpdate"
defaultAccountStatus:
caseSubject: "Address Update Service Request"
```

FinancialAccounts input format:

```
[
  {
    "Id": "REC0",
    "isSelected": true,
    "ConvertedFinancialAccountNumber": "1878",
    "FinancialAccountNumber": "700021878",
    "State": "CA",
    "Country": "United States",
    "PostalCode": "512534",
    "FinancialAccountId": "a0FRN000000Dt6C2AS",
    "City": "San Fransisco",
    "Address1": "33 Ridgemond Street",
    "AccountName": "Priority Checking",
    "uniqueKey": "REC0",
    "_flex": {
      "uniqueKey": "REC0"
    }
  },
  {
    "Id": "REC1",
    "isSelected": true,
    "ConvertedFinancialAccountNumber": "0130",
    "FinancialAccountNumber": "78000130",
    "State": "Florisa",
    "Country": "United States",
    "PostalCode": "514534",
    "FinancialAccountId": "a0FRN000000Dt7Z2AS",
    "City": "Naples",
    "Address1": "91 Town Road",
    "AccountName": "Cash Rewards Credit Card",
    "uniqueKey": "REC1",
    "_flex": {
      "uniqueKey": "REC1"
```

```
    }
  }
]
```

customerLevelAddresses input format:

```
[
  {
    "Id": "REC0",
    "isSelected": true,
    "type": "Shipping",
    "Address": "33 Ridgemond Street San Fransisco CA 613654 United State",
    "uniqueKey": "REC0",
    "_flex": {
      "uniqueKey": "REC0"
    }
  },
  {
    "Id": "REC1",
    "isSelected": true,
    "type": "Billing",
    "Address": "33 Ridgemond Street San Fransisco CA 67136 United State",
    "uniqueKey": "REC1",
    "_flex": {
      "uniqueKey": "REC1"
    }
  }
]
```

documentInfo input format:

```
[
  {
    "typeId": "0deRN000000009UYAQ",
    "docType": "Passport",
    "name": "Passport.pdf",
    "id": "069RN00000033O1YAI"
  },
  {
    "typeId": "0deRN00000000CnYAI",
    "docType": "Medicard",
    "name": "Passport.pdf",
    "id": "069RN00000033O6YAI"
  }
]
```

Output format: None

FeeReversalHelperFunctions Class

The callable FeeReversalHelperFunctions class provides data conversion functions for use in the Fee Reversal OmniScript. This class accepts a list of transactions from the related Fee Reversal Case Object and the corresponding Fee Reversal amounts as inputs and calls the Fee Reversal Mule API endpoint.

Namespace

fscserviceprocesses

Usage

The FeeReversalHelperFunctions class is a helper function for the GET and POST methods of the SvcCatalogRequest Connect API. The Fee Reversal OmniScript calls Integration Procedures that call the FeeReversalHelperFunctions methods via Remote Actions.

FeeReversalHelperFunctions Methods

FeeReversalHelperFunctions Methods

The following are methods for `FeeReversalHelperFunctions`.

call(action, args)
This method calls one of the available FeeReversalHelperFunctions actions and passes arguments to that action.

`call(action, args)`

This method calls one of the available FeeReversalHelperFunctions actions and passes arguments to that action.

Signature

```
public Object call(String action, Map<String, Object> args)
```

Parameters

`action`
Type: String

The action to call. The value must be one of the following:

- *`getFeeReversalAttributes`* — Fetches the list of Service Process attributes for the Fee Reversal request.
- *`callCreateCaseApi`* — Creates a new Case and a related Service Process record with the transaction data.

`args`
Type: Map<String, Object>

The first three keys must be input, output, and options. The required content for each depends on the action:

- *`getFeeReversalAttributes`*
  - String caseId — Id of the Case created using the Fee Reversal OmniScript.
- *`callCreateCaseApi`*
  - Map<String,Object>

Return Value

Type: Map<String, Object>

The return values of the corresponding action.

Usage

To use this class in an Integration Procedure, specify the class in the Remote Class property, the action in the Remote Method property, and the arguments in the Additional Input property.

Examples

Input and output JSON examples for some of the actions are as follows.

getFeeReversalAttributes

Input format:

```
{"caseId": "500RM000003rQu1YAE"}
```

Output format:

```
{
    "caseRequestAttr": {
      "FinancialAccountId": "a0URM0000004OCM2A2",
      "Transactions": [
        {
          "frt_reversal_transaction_description": "Reverse Cheque book charge",
          "frt_reversal_amount_currency": "USD",
          "frt_reversal_percentage": 100,
          "frt_transaction_id": "12",
          "frt_reversal_error_reason": null,
          "frt_override_percentage": 80,
          "frt_reversal_transaction_amount": 40,
          "groupCorrelationNumber": 1,
          "frt_transaction_code": "54",
          "frt_override_amount_currency": "USD",
          "frt_transaction_posted_date": "2022-11-11T12:53:14.000Z",
          "frt_fee_type": "Cheque book charge",
          "override_percentage_formatted": "80.0%",
          "frt_override_amount": 40,
          "frt_transaction_amount_currency": "USD",
          "frt_transaction_description": "Fee charge for Cheque book",
          "frt_reversal_transaction_posted_date": "2022-11-15T20:20:20.000Z",
          "reversal_percentage_formatted": "100.0%",
          "frt_transaction_amount": 50,
          "frt_reversal_amount": 50,
          "frt_reversal_transaction_id": "1001116623",
          "frt_reversal_transaction_amount_currency": null
        }
      ]
    }
  }
```

callCreateCaseApi

Input format:

```
{
  "attributes": {
    "data": {
      "financial_account_id_1": {
```

```
        "value": "accountId"
      },
      "source_system_id_1": {
        "value": "100"
      },
      "reversal_reason_1": {
        "value": null
      },
      "fee_reversal_transactions_1": {
        "value": [
          {
            "frt_transaction_id_1": "12",
            "frt_transaction_posted_date_1": "2022-11-11T12:53:14.924Z",
            "frt_transaction_amount_1": 50,
            "frt_transaction_amount_currency_1": "USD",
            "frt_fee_type_1": "Check book charge",
            "frt_transaction_code_1": "54",
            "frt_reversal_amount_currency_1": null,
            "frt_reversal_amount_1": null,
            "frt_reversal_percentage_1": null,
            "frt_override_amount_currency_1": null,
            "frt_override_amount_1": null,
            "frt_override_percentage_1": null,
            "frtr_transaction_id_1": null,
            "frtr_transaction_posted_date_1": null,
            "frtr_transaction_description_1": null,
            "frtr_transaction_amount_1": null,
            "frtr_transaction_amount_currency_1": null,
            "frtr_error_reason_1": null
          }
        ]
      },
      "reversal_summary_1": {
        "value": {
          "reversal_transaction_status_1": null
        }
      }
    }
  },
  "svcCatalogItemDefApiName": "Fee_Reversal_Test_2",
  "caseInfo": {
    "data": {
      "Subject": {
        "value": "Check book charge reversal"
      },
      "Origin": {
        "value": "Phone"
      }
    }
  }
}
```

Output format:

```
{
   "svcCatalogRequestId": "946xx000000009hEAA",
   "caseId": "500xx000000cd69AAA",
   "caseNumber": "00001032"
}
```

fscwmgen Namespace

The `fscwmgen` namespace provides an interface used for Record Alerts.

Note: The RecordAlertProvider namespace cannot be used in DML operations.

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

RecordAlertActionInfo Class
Represents information about the action taken on the record alert.

RecordAlertInfo Class
Represents details about the record alert.

RecordAlertProvider Interface
Implement this interface to provide record alerts and to perform actions on the record alerts.

RecordAlertsWrapper Class
Use the callable RecordAlertsWrapper class to fetch Record Alert data. For Financial Services Cloud, you can group the results by Financial Account and Record Alert Category.

RecordAlertActionInfo Class

Represents information about the action taken on the record alert.

Namespace

fscwmgen

RecordAlertActionInfo Properties

RecordAlertActionInfo Properties

The following are properties for `RecordAlertActionInfo`.

actionName
The name of the action performed on a record alert.

parameters
List of parameters specified for the record alert action.

`actionName`

The name of the action performed on a record alert.

The following are the valid values:

- `dismiss`
- `snooze`

Signature

```
public String actionName {get; set;}
```

Property Value

Type: String

`parameters`

List of parameters specified for the record alert action.

The snooze action requires the `effectiveDate` parameter. The dismiss action requires no parameters.

Signature

```
public List<String> parameters {get; set;}
```

Property Value

Type: List<String>

RecordAlertInfo Class

Represents details about the record alert.

Namespace

fscwmgen

RecordAlertInfo Properties

RecordAlertInfo Properties

The following are properties for `RecordAlertInfo`.

actionInfoList

Details of an action taken on a record alert.

categoryFullName

The category name of the record alert.

description
The description of the record alert.

effectiveDate
The start date and time from when an active record alert is in effect.

isActive
Indicates whether a record alert is active or not.

parentId
The parent ID of the record alert.

severity
Indicates the degree of impact of the record alert.

sourceSystemId
The ID of the source system that this record alert was sourced from.

subject
The subject line of the record alert.

validUntilDate
The date and time from when a record alert is no longer valid.

whatId
The Salesforce object record ID on which a record alert is created.

actionInfoList

Details of an action taken on a record alert.

Signature

```
public List<fscwmgen.RecordAlertActionInfo> actionInfoList {get; set;}
```

Property Value

Type: List<fscwmgen.RecordAlertActionInfo>

categoryFullName

The category name of the record alert.

Signature

```
public String categoryFullName {get; set;}
```

Property Value

Type: String

description

The description of the record alert.

Signature

```
public String description {get; set;}
```

Property Value

Type: String

`effectiveDate`

The start date and time from when an active record alert is in effect.

Signature

```
public Datetime effectiveDate {get; set;}
```

Property Value

Type: Datetime

`isActive`

Indicates whether a record alert is active or not.

Signature

```
public Boolean isActive {get; set;}
```

Property Value

Type: Boolean

`parentId`

The parent ID of the record alert.

Signature

```
public String parentId {get; set;}
```

Property Value

Type: String

`severity`

Indicates the degree of impact of the record alert.

Signature

```
public String severity {get; set;}
```

Property Value

Type: String

sourceSystemId

The ID of the source system that this record alert was sourced from.

Signature

```
public String sourceSystemId {get; set;}
```

Property Value

Type: String

subject

The subject line of the record alert.

Signature

```
public String subject {get; set;}
```

Property Value

Type: String

validUntilDate

The date and time from when a record alert is no longer valid.

Signature

```
public Datetime validUntilDate {get; set;}
```

Property Value

Type: Datetime

whatId

The Salesforce object record ID on which a record alert is created.

Signature

```
public String whatId {get; set;}
```

Property Value

Type: String

RecordAlertProvider Interface

Implement this interface to provide record alerts and to perform actions on the record alerts.

Namespace

fscwmgen

RecordAlertProvider Methods

RecordAlertProvider Example Implementation

RecordAlertProvider Methods

The following are methods for `RecordAlertProvider`.

dismissAlert(var1)

Use this method to dismiss the record alert.

getAlertsByParentId(var1)

Retrieve record alerts by the parent ID.

getAlertsByWhatId(var1)

Retrieve record alerts by the Salesforce object record ID.

getAlertsByWhatIdAndParentId(var1, var2)

Retrieve record alerts by both the Salesforce record ID and the related parent ID.

snoozeAlert(var1, var2)

Use this method to snooze the record alert.

`dismissAlert(var1)`

Use this method to dismiss the record alert.

Signature

```
public fscwmgen.RecordAlertInfo dismissAlert(String var1)
```

Parameters

var1

Type: String

Specify the action value as `Dismiss`.

Return Value

Type: fscwmgen.RecordAlertInfo

`getAlertsByParentId(var1)`

Retrieve record alerts by the parent ID.

Note: This method aggregates alerts associated with PersonAccount and FinancialAccount. For example, `getRecordByParentId` on PersonAccount returns all alerts related to the person account, all alerts related to the person's financial accounts, and all alerts related to financial account transactions for each financial account.

Signature

```
public List<fscwmgen.RecordAlertInfo> getAlertsByParentId(String var1)
```

Parameters

var1
Type: String

Specify the parent ID.

Return Value

Type: List<fscwmgen.RecordAlertInfo>

`getAlertsByWhatId(var1)`

Retrieve record alerts by the Salesforce object record ID.

Note: This method aggregates alerts associated with PersonAccount and FinancialAccount. For example, `getRecordByWhatId` on PersonAccount returns all alerts related to the person account, all alerts related to the person's financial accounts, and all alerts related to financial account transactions for each financial account.

Signature

```
public List<fscwmgen.RecordAlertInfo> getAlertsByWhatId(String var1)
```

Parameters

var1
Type: String

Specify the Salesforce record ID.

Return Value

Type: List<fscwmgen.RecordAlertInfo>

`getAlertsByWhatIdAndParentId(var1, var2)`

Retrieve record alerts by both the Salesforce record ID and the related parent ID.

Note: This method aggregates alerts associated with PersonAccount and FinancialAccount. For example, `getRecordByWhatId` on PersonAccount returns all alerts related to the person account, all alerts related to the person's financial accounts, and all alerts related to financial account transactions for each financial account.

It returns alerts in the following basic structure for `whatId` and `parentId`.

What Id	Parent Id	Subject	Description
Person AccountId	null	Text1	Text2
Financial AccountId	null	Text3	Text4
Financial TransactionId	Financial AccountId	Text5	Text6

Signature

```
public List<fscwmgen.RecordAlertInfo> getAlertsByWhatIdAndParentId(String var1, String var2)
```

Parameters

var1
Type: String

Specify the related parent ID.

var2
Type: String

Specify the Salesforce record ID.

Return Value

Type: List<fscwmgen.RecordAlertInfo>

`snoozeAlert(var1, var2)`

Use this method to snooze the record alert.

Signature

```
public fscwmgen.RecordAlertInfo snoozeAlert(String var1, Datetime var2)
```

Parameters

var1
Type: String

Specify the action value as `Dismiss`.

var2
Type: Datetime

Specify the snooze date for the record alert to reappear after the specified time period.

Return Value

Type: fscwmgen.RecordAlertInfo

RecordAlertProvider Example Implementation

This is an example implementation of the `fscwmgen.RecordAlertProvider` interface.

The following example tests the implementation:

```
global class CoreBankingAlertProvider implements fscwmgen.RecordAlertProvider {

    public List<fscwmgen.RecordAlertInfo> getAlertsByWhatId(String whatId) {
        HttpRequest req = new HttpRequest();
        // This callout is specific to the Core banking.
        req.setEndpoint('callout:My_Named_Credential/get_by_whatId');
        req.setMethod('GET');
        Http http = new Http();
        HTTPResponse res = http.send(req);
        Map<String, Object> jsonResp = (Map<String, Object>)
JSON.deserializeUntyped(response.getBody());
        List<Object> results = (List<Object>) jsonResp.get('results');

        List<fscwmgen.RecordAlertInfo> newAlerts = new List<fscwmgen.RecordAlertInfo>();
       // Assuming CoreBankingResult is an apex class holding the result from CoreBanking.

        for(CoreBankingResult res : results){
          fscwmgen.RecordAlertInfo newAlert = convertCoreBankingAlertToSalesforceAlert(res,
 whatId, null);
            newAlerts.add(newAlert);
        }

        // Return the list of alerts
        return newAlerts;
    }

    public List<fscwmgen.RecordAlertInfo> getAlertsByParentId(String parentId) {
        HttpRequest req = new HttpRequest();
        // This callout is specific to the Core banking.
        req.setEndpoint('callout:My_Named_Credential/get_by_parentId');
        req.setMethod('GET');
        Http http = new Http();
        HTTPResponse res = http.send(req);
        Map<String, Object> jsonResp = (Map<String, Object>)
JSON.deserializeUntyped(response.getBody());
        List<Object> results = (List<Object>) jsonResp.get('results');

        List<fscwmgen.RecordAlertInfo> newAlerts = new List<fscwmgen.RecordAlertInfo>();
       // Assuming CoreBankingResult is an apex class holding the result from CoreBanking.

        for(CoreBankingResult res : results){
            // Retrieve whatId for this specific alert. Can be queried from Salesforce or
 provided by CoreBanking.
            String whatId = retrieveWhatId();
          fscwmgen.RecordAlertInfo newAlert = convertCoreBankingAlertToSalesforceAlert(res,
 whatId, parentId);
            newAlerts.add(newAlert);
        }
```

```
        // Return the list of alerts
        return newAlerts;
    }

    public List<fscwmgen.RecordAlertInfo> getAlertsByWhatIdAndParentId(String whatId,
String parentId) {
        HttpRequest req = new HttpRequest();
        // This callout is specific to the Core banking.
        req.setEndpoint('callout:My_Named_Credential/get_by_whatId_and_parentId');
        req.setMethod('GET');
        Http http = new Http();
        HTTPResponse res = http.send(req);
        Map<String, Object> jsonResp = (Map<String, Object>)
JSON.deserializeUntyped(response.getBody());
        List<Object> results = (List<Object>) jsonResp.get('results');

        List<fscwmgen.RecordAlertInfo> newAlerts = new List<fscwmgen.RecordAlertInfo>();
       // Assuming CoreBankingResult is an apex class holding the result from CoreBanking.

        for(CoreBankingResult res : results){
          fscwmgen.RecordAlertInfo newAlert = convertCoreBankingAlertToSalesforceAlert(res,
 whatId, parentId);
            newAlerts.add(newAlert);
        }

        // Return the list of alerts
        return newAlerts;
    }

   public fscwmgen.RecordAlertInfo snoozeAlert(String alertId, Datetime snoozeUntilDate){

        HttpRequest req = new HttpRequest();
        // This callout is specific to the Core banking.
        req.setEndpoint('callout:My_Named_Credential/snoozeAlert');
        req.setMethod('GET');
        Http http = new Http();
        HTTPResponse res = http.send(req);
        // Perform error handling on response. Below code is when the response is valid.
        Map<String, Object> jsonResp = (Map<String, Object>)
JSON.deserializeUntyped(response.getBody());
        List<Object> results = (List<Object>) jsonResp.get('results');
        // Retrieve whatId from corebanking result. Other mechanism is to lookup from
salesforce.
        String whatId = results.get(0).getId();
        return convertCoreBankingAlertToSalesforceAlert(results.get(0));
    }

    public fscwmgen.RecordAlertInfo dismissAlert(String alertId) {
        HttpRequest req = new HttpRequest();
        // This callout is specific to the Core banking.
        req.setEndpoint('callout:My_Named_Credential/snoozeAlert');
        req.setMethod('GET');
        Http http = new Http();
```

```
        HTTPResponse res = http.send(req);
        // Perform error handling on response. Below code is when the response is valid.
        Map<String, Object> jsonResp = (Map<String, Object>)
JSON.deserializeUntyped(response.getBody());
        List<Object> results = (List<Object>) jsonResp.get('results');
        / Retrieve whatId from corebanking result. Other mechanism is to lookup from
salesforce.
        String whatId = results.get(0).getId();
        return convertCoreBankingAlertToSalesforceAlert(results.get(0));
    }

    private RecordAlertInfo convertCoreBankingAlertToSalesforceAlert(CoreBankingResult
alert, String whatId, String parentId) {
        fscwmgen.RecordAlertInfo newAlert = new fscwmgen.RecordAlertInfo();
        newAlert.subject = alert.getSubject();
        newAlert.description = alert.getDescription();
        newAlert.sourceSystemId = alert.getId();
        newAlert.parentId = parentId;
        newAlert.whatId = whatId;
        // This could also use conversion from Core Banking category to salesforce
RecordAlertCategory
        newAlert.categoryFullName = 'Fraud';

        newAlert.actionInfoList = new List<fscwmgen.RecordAlertActionInfo>();
        // snooze Action
        fscwmgen.RecordAlertActionInfo snooze = new fscwmgen.RecordAlertActionInfo();
        snooze.actionName = 'snooze';
        snooze.parameters = new List<String>();
        // SnoozeUntilDate is required parameter
        snooze.parameters.add('snoozeUntilDate');
        newAlert.actionInfoList.add(snooze);

        // Dismiss Action
        fscwmgen.RecordAlertActionInfo dismiss = new fscwmgen.RecordAlertActionInfo();
        dismiss.actionName = 'dismiss';
        newAlert.actionInfoList.add(dismiss);

        return newAlert;
    }
}
```

RecordAlertsWrapper Class

Use the callable RecordAlertsWrapper class to fetch Record Alert data. For Financial Services Cloud, you can group the results by Financial Account and Record Alert Category.

Namespace

fscwmgen

Usage

The ServiceExcellenceAlertCard and ServiceExcellenceGenericAlertCard have Integration Procedure data sources that call the RecordAlertsWrapper class. These FlexCards display information about financial accounts.

RecordAlertsWrapper Methods

RecordAlertsWrapper Methods

The following are methods for `RecordAlertsWrapper`.

call(action, args)
This method calls one of the available RecordAlertsWrapper actions and passes arguments to that action.

`call(action, args)`

This method calls one of the available RecordAlertsWrapper actions and passes arguments to that action.

Signature

```
public Object call(String action, Map<String, Object> args)
```

Parameters

`action`
Type: String

The action to call. The value must be one of the following:

- *`getAlertsByWhatId`* — Returns all active Record Alerts with the specified Id, where SnoozeUntilDate < now < ValidUntilDate.
- *`getAlertsByWhatIdBatch`* — Returns all active record alerts with one of the specified Ids, where SnoozeUntilDate < now < ValidUntilDate.
- *`snoozeAlert`* — Snoozes the Record Alert with the specified Id until the snoozeUntilDate value.
- *`dismissAlert`* — Dismisses the record alert with the specified Id by setting the isActive field to false.

`args`
Type: Map<String, Object>

The arguments passed to the corresponding action:

- *`getAlertsByWhatId`*
  - String Id — The Id of the what Id field to fetch Record alerts.
  - boolean IsFSC — Set to true to group results by Financial Account and Record Alert Category.
  - int Limit — Maximum number of alerts to return. Allowed values are 1-20.
  - int childLimit — Maximum number of aggregated alerts to return. Allowed values are 1-10.
- *`getAlertsByWhatIdBatch`*
  - List<String> Ids — The Ids of the what Id field to fetch Record alerts.

  - boolean IsFSC — Set to true to group results by Financial Account and Record Alert Category.
  - int Limit — Maximum number of alerts to return. Allowed values are 1-20.
  - int childLimit — Maximum number of aggregated alerts to return. Allowed values are 1-10.

- *`snoozeAlert`*
  - String Id — The id of the Record Alert to snooze.
  - Date snoozeUntilDate — The date at which the Record Alert is no longer snoozed.

- *`dismissAlert`*
  - String Id — The id of the record alert to dismiss.

Return Value

The data returned by getAlertsByWhatId and getAlertsByWhatIdBatch looks like this:

```
{
  "numAlerts": 2,
  "groupedAlerts": [
    {
      "Subject": "Sample Alert",
      "Description": "Sample Description",
      "WhatId": "0x0000002c4d4eM",
      "StartDate": "2022-11-30T15:05:47",
      "ValidUntilDate": "2023-11-30T15:05:47",
      "SnoozeUntilDate": "2022-12-05T15:05:47"
    }
  ],
  "alerts": [
    {
      "Subject": "Sample Alert",
      "Description": "Sample Description",
      "WhatId": "0x0000002c4d4eM",
      "StartDate": "2022-11-30T15:05:47",
      "ValidUntilDate": "2023-11-30T15:05:47",
      "SnoozeUntilDate": "2022-12-05T15:05:47"
    }
  ]
}
```

Usage

To use this class in an Integration Procedure, specify the class in the Remote Class property, the action in the Remote Method property, and the arguments in the Additional Input property.

industriespersonalizedfinance Namespace

The `industriespersonalizedfinance` namespace classes provide data helper functions for use in personalized finance.

Note: The industriespersonalizedfinance namespace cannot be used in DML operations.

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

CDPQuery Class
Use the callable CDPQuery class to provide data helper functions for use in the Cash Flow FlexCard.

FSCPersonalizedFinanceUtil Class
Use the callable FSCPersonalizedFinanceUtil class to provide data helper functions for income and expense data in the Cash Flow FlexCard.

CDPQuery Class

Use the callable CDPQuery class to provide data helper functions for use in the Cash Flow FlexCard.

Namespace

industriespersonalizedfinance

CDPQuery Methods
The following are methods for `CDPQuery`.

CDPQuery Methods

The following are methods for `CDPQuery`.

`CDPQuery` is a callable class. Its only method is `call`.

call(action, args)
This method calls one of the available `CDPQuery` actions and passes arguments to that action.

`call(action, args)`

This method calls one of the available `CDPQuery` actions and passes arguments to that action.

Signature

```
public Object call(String action, Map<String, Object> args)
```

Parameters

`action`
Type: String

The action to call. The value must be one of the following actions:

- *`getCalculatedInsight`* — Invokes the queryCalculatedInsights method of the CdpQuery Apex class, specifying only the ciName, orderBy, and filters parameters.
- *`hasRecordAccess`* — Returns true if the current user has access to the specified Account.
- *`isPersonAccount`* — Returns true if the specified Account is a Person Account.

args
Type: Map<String, Object>

The arguments passed to the corresponding action. All actions require input, output, and options arguments, but these arguments can be empty if the action doesn't use them. Values listed here are for the input argument.

- *getCalculatedInsight* — Accepts calculatedInsightName, orderBy, and filters keys.
- *hasRecordAccess* — Accepts an AccountId.
- *isPersonAccount* — Accepts an AccountId.

Return Value

Type: Map<String, Object>

The return values of the corresponding action, returned in the output argument.

- *getCalculatedInsight* — Returns the data property from a CdpQueryOutput object under the calculatedInsightData key.
- *hasRecordAccess* — Returns true in the hasRecordAccess key if the current user has access to the specified Account. Returns an additional errorMessage key if hasRecordAccess is false.
- *isPersonAccount* — Returns true in the isPersonAccount key if the specified Account is a Person Account. Returns an additional errorMessage key if isPersonAccount is false.

Usage

To use this method in an Integration Procedure, specify the class in the Remote Class property, the action in the Remote Method property, and the arguments in the Additional Input property.

FSCPersonalizedFinanceUtil Class

Use the callable FSCPersonalizedFinanceUtil class to provide data helper functions for income and expense data in the Cash Flow FlexCard.

Namespace

industriespersonalizedfinance

FSCPersonalizedFinanceUtil Methods
The following are methods for `FSCPersonalizedFinanceUtil`.

FSCPersonalizedFinanceUtil Methods

The following are methods for `FSCPersonalizedFinanceUtil`.

`FSCPersonalizedFinanceUtil` is a callable class. Its only method is `call`.

call(action, args)
This method calls one of the available `FSCPersonalizedFinanceUtil` actions and passes arguments to that action.

`call(action, args)`

This method calls one of the available `FSCPersonalizedFinanceUtil` actions and passes arguments to that action.

Signature

```
public Object call(String action, Map<String, Object> args)
```

Parameters

action

Type: String

The action to call. The only action is getIncomeExpenseCategories.

- *getIncomeExpenseCategories* — Retrieves categorized income or expenses to populate the Income or Expenses pie chart in the Cash Flow FlexCard.

args

Type: Map<String, Object>

The arguments passed to the corresponding action. All actions require input, output, and options arguments, but these arguments can be empty if the action doesn't use them. Values listed here are for the input argument.

- *getIncomeExpenseCategories* — Accepts an Option argument, set to Income or Expense, followed by an Income or Expense list, as in the following examples. This Option argument is different from the standard options argument, which is empty for this action.

Income example:

```
{
  "Option": "Income",
  "Income": [
    {
      "FinancialAccountName__c": "Simon Checking",
      "PartyId__c": "001SB000003ECqnYAG",
      "PartyName__c": "Simon Maurice",
      "TransactionCategory__c": "Salary",
      "TotalDepositsByCategory__c": 5000,
      "FinancialAccountId__c": "a0USB0000005xYv2AI"
    },
    {
      "FinancialAccountName__c": "Simon Checking",
      "PartyId__c": "001SB000003ECqnYAG",
      "PartyName__c": "Simon Maurice",
      "TransactionCategory__c": "Salary",
      "TotalDepositsByCategory__c": 5000,
      "FinancialAccountId__c": "a0USB0000005xYv2AI"
    },
    {
      "FinancialAccountName__c": "Simon Checking",
      "PartyId__c": "001SB000003ECqnYAG",
      "PartyName__c": "Simon Maurice",
      "TransactionCategory__c": "Bonus",
      "TotalDepositsByCategory__c": 5000,
      "FinancialAccountId__c": "a0USB0000005xYv2AI"
    }
  ]
}
```

Expenses example:

```
{
  "Option": "Expenses",
  "Income": [
    {
      "FinancialAccountName__c": "Simon Checking",
      "PartyId__c": "001SB000003ECqnYAG",
      "PartyName__c": "Simon Maurice",
      "TransactionCategory__c": "Car Payment",
      "TotalExpensesByCategory__c": 10000,
      "FinancialAccountId__c": "a0USB0000005xYv2AI"
    }
  ]
}
```

Return Value

Type: Map<String, Object>

The return values of the corresponding action, returned in the output argument.

- *`getIncomeExpenseCategories`* — Returns total income or expenses under the TotalAmount key and categorized amounts and percentages under the Data key, as in the following example. If there are more than five categories, the sixth and subsequent categories are grouped.

```
{
  "TotalAmount": 15000,
  "Data": [
    {
      "Amount": 10000,
      "Category": "Salary  $10000 (67%)"
    },
    {
      "Amount": 5000,
      "Category": "Bonus  $5000 (33%)"
    }
  ]
}
```

Usage

To use this method in an Integration Procedure, specify the class in the Remote Class property, the action in the Remote Method property, and the arguments in the Additional Input property.

FINANCIAL SERVICES CLOUD BUSINESS APIS

Financial Services Cloud Business APIs are RESTful APIs that are sometimes available as Apex classes and methods.

REST Reference
You can access Financial Services Cloud Business APIs using REST endpoints. These REST APIs follow similar conventions as Connect REST APIs.

REST Reference

You can access Financial Services Cloud 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 Financial Services Cloud Business API resources.

Request Bodies
Here's a list of Financial Services Cloud Business API request bodies.

Response Bodies
Here's a list of Financial Services Cloud Business API response bodies.

Resources

Here's a list of Financial Services Cloud Business API resources.

Application Mapper
Create financial accounts and related records from a residential loan application.

Bulk Record Alerts (Financial Accounts)
Retrieve bulk record alerts. Use to fetch bulk record alerts associated with financial accounts.

Bulk Record Alerts (Person Accounts)
Retrieve bulk record alerts. Use to fetch bulk record alerts associated with person accounts.

Dispute Management Ethoca Alert Callback
Send an Ethoca alert callback for transaction dispute management.

Financial Goals
Create financial goals, goal members, and goal funding.

Financial Goal Update
Update a financial goal and its members and funding.

Financial Goals Query

Query financial goals, goal members, and goal funding using the parent Person Account, Household, or Party Relationship Group record.

Mortgage Application

Use a single API call to get and update mortgage application information like borrowers, declarations, incomes, addresses, financial transactions, liabilities, assets, properties, and title holders. You can use both the `loanApplicationId` and the `externalID` of an external system to get a mortgage application.

Mortgage Applications

Create mortgage applications using the POST method.

Public Complaint

Create a customer complaint.

Record Alerts (Financial Accounts)

Retrieve a list of active record alerts on financial accounts.

Record Alerts (Person Accounts)

Retrieve a list of active record alerts on person accounts.

Retrieval Summary

Get the data of a retrieval summary definition by using the root record ID and the retrieval summary defTinition ID.

Application Mapper

Create financial accounts and related records from a residential loan application.

Resource

```
/connect/financialservices/mapper
```

Available version

49.0

Requires Chatter

No

HTTP methods

POST

Request body for POST

JSON example

```
{
  "recordId": "0cdB0000000CbVGIA0"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`recordId`	String	ID of the residential loan application.	Required	49.0

Response example

```
{
  "result": {
    "assetsAndLiabilities": [
      "a03B000000735LwIAI",
      "a03B000000735LxIAI",
      "a03B000000735LyIAI"
    ],
    "customerProperties": [
      "0b8B0000000GnjdIAC"
    ],
    "errors": [],
    "financialAccounts": [
      "a0EB000000227WtMAI",
      "a0EB000000227WuMAI",
      "a0EB000000227WvMAI"
    ],
    "personAccounts": [
      "001B000001K8Zx5IAF"
    ],
    "status": "SUCCESS"
  }
}
```

Response body for POST

Mapper Result Representation on page 1220

Bulk Record Alerts (Financial Accounts)

Retrieve bulk record alerts. Use to fetch bulk record alerts associated with financial accounts.

You can retrieve these alerts for a financial account:

- Alerts for the specified financial account.
- Alerts on financial transactions that are related to the financial account.

Resource

```
/recordalerts/batch
```

Resource Examples

```
https://yourInstance.salesforce.com/services/data/vXX.X/recordalerts/batch?
financialAccountIds=0x3R0000026YJ8uIAG,0x3R0000026YJ8uIAG,0x3Dx00000004X2F
```

Available version

55.0

Requires Chatter

No

HTTP methods

GET

Request parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
financialAccountIds	String[]	The IDs of the financial account records on which record alerts are created.	Required	55.0

Response body for GET

Record Alert Collection Map

Bulk Record Alerts (Person Accounts)

Retrieve bulk record alerts. Use to fetch bulk record alerts associated with person accounts.

You can retrieve these alerts for a person account:

- Alerts for the specified person account.
- Alerts for the financial accounts owned by the person.
- Alerts on financial transactions that are related to the financial accounts.

Resource

```
/recordalerts/batch
```

Resource Examples

```
https://yourInstance.salesforce.com/services/data/vXX.X/recordalerts/batch?
personIds=001R0000026YJ8uIAG,001R0000026YJ8uIAG,001x00000004
```

Available version

55.0

Requires Chatter

No

HTTP methods

GET

Request parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
personIds	String[]	The IDs of the person records on which record alerts are created.	Required	55.0

Response body for GET

Record Alert Collection Map

Dispute Management Ethoca Alert Callback

Send an Ethoca alert callback for transaction dispute management.

Resource

```
/connect/dispute-management/third-party/ethoca/alert-callback
```

Available version

60.0

HTTP methods

POST

Request body for POST

JSON example

```
{
  "ethocaInputPayload": {
    "events": [
      {
        "id": "3a375ce5-5e1d-40a7-97b5-1514a0876364",
        "eventType": "Batch Processed",
        "resourceLink": {
          "resource":
"https://www.ethocaweb.com/ethoca-rest/rest/api/v1/transactions/batch/3a375ce5-5e1d-40a7-97b5-1514a0876364"

        }
      },
      {
        "id": "3a375ce5-5e1d-40a7-97b5-1514a0876365",
        "eventType": "Batch Processed",
        "resourceLink": {
          "resource":
"https://www.ethocaweb.com/ethoca-rest/rest/api/v1/transactions/batch/3a375ce5-5e1d-40a7-97b5-1514a0876365"

        }
      }
    ]
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`ethocaInputPayload`	Ethoca Event on page 1168[]	Ethoca event input payload.	Required	60.0

Request parameters for POST

Parameter Name	Type	Description	Required or Optional	Available Version
`disputeManagementRequestData`	Object	Top-level parameter for dispute management request data.	Required	60.0

Response body for POST
Ethoca Alert Callback Output

Financial Goals

Create financial goals, goal members, and goal funding.

Resource

```
/connect/financialplanning/financialgoals
```

Available version
59.0

Requires Chatter
No

HTTP methods
POST

Request body for POST

JSON example

In this example, `carType` and `role` are custom fields.

```
{
  "financialGoals": [
    {
      "financialGoal": {
        "actualAmount": "$1000.00",
        "completionDate": "2024-05-01",
        "initialAmount": "$500.00",
        "description": "Car for commuting",
        "priority": "P1",
        "startDate": "2023-05-01",
        "status": "InProgress",
        "targetAmount": "$50000.00",
        "targetDate": "2024-05-01",
        "name": "Goal1",
        "type": "Auto",
        "customFields": {
          "carType": "New luxury car"
        }
      },
      "financialGoalParties": [
        {
          "accountId": "001xx000003GYyJAAW",
          "customFields": {
            "role": "Auto purchaser"
          }
        },
        {
          "accountId": "001xx000005dJCxYAM",
          "customFields": {
            "role": "Auto purchaser partner"
          }
```

```
          }
        ]
      }
    ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`financialGoals`	Financial Goal Create Input[]	List of goals and goal members to be created.	Required	59.0

Response body for POST

Financial Goals Create Output

Financial Goal Update

Update a financial goal and its members and funding.

Resource

```
/connect/financialplanning/financialgoals/goalId
```

Available version

59.0

Requires Chatter

No

HTTP methods

PATCH

Request body for PATCH

JSON example

In this example, `carType`, `role`, and `FSC9__FinancialAccount__c` are custom fields.

```
{
  "financialGoal": {
    "completionDate": "2024-06-01",
    "description": "Cars for commuting",
    "targetAmount": "$55000.00",
    "targetDate": "2024-06-01",
    "customFields": {
      "carType": "New luxury car and used car"
    }
  },
  "addFinancialGoalParties": [
    {
      "accountId": "001xx000003GYyJAAV",
      "customFields": {
        "role": "Auto purchaser daughter"
      }
```

```
    }
  ],
  "addFinancialGoalFundings": [
    {
      "amount": 2000,
      "currencyIsoCode": "USD",
      "customFields": {
        "FSC9__FinancialAccount__c": "a0HSG0000000AfJ2AV"
      }
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`addFinancialGoalFundings`	Financial Goal Funding Input[]	Financial Accounts to be added to the Financial Goal.	Optional	60.0
`addFinancialGoalParties`	Financial Goal Party Input[]	Goal members to be added to the Financial Goal.	Optional	59.0
`financialGoal`	Financial Goal Input	Financial Goal data.	Required for 59.0, Optional for 60.0	59.0
`removeFinancialGoalFundings`	Financial Goal Funding Input[]	Financial Accounts to be removed from the Financial Goal.	Optional	60.0
`removeFinancialGoalParties`	Financial Goal Party Input[]	Goal members to be removed from the Financial Goal.	Optional	59.0

Response body for PATCH

Financial Goal Patch Output

Financial Goals Query

Query financial goals, goal members, and goal funding using the parent Person Account, Household, or Party Relationship Group record.

Resource

```
/connect/financialplanning/financialgoals/query/parentRecordId
```

Available version

59.0

Requires Chatter

No

HTTP methods

POST

Request body for POST

JSON example

```
{
  "financialGoalFields": [
    "Name",
    "Description",
    "ActualAmount",
    "CompletionDate"
  ],
  "financialGoalPartyFields": [
    "AccountId",
    "Account.Name"
  ],
  "filterCriteria": [
    {
      "fieldName": "FinancialGoal.Type",
      "operator": "equals",
      "value": "Retirement"
    }
  ],
  "offset": 1,
  "limit": 10,
  "sortBy": "DESC",
  "orderBy": "FinancialGoal.Name"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`filterCriteria`	Filter Criteria[]	Filter criteria for the results.	Optional	59.0
`financialGoalFields`	String[]	List of developer names of the fields from the FinancialGoal object to be retrieved.	Required for 59.0, Optional for 60.0	59.0
`financialGoalFundingFields`	String[]	List of field developer names from the FinancialAccount object to be retrieved.	Optional	60.0
`financialGoalPartyFields`	String[]	List of field developer names from the FinancialGoalParty object to be retrieved.	Optional	59.0
`limit`	Integer	Maximum number of financial goals returned in each response.	Optional	59.0
`offset`	Integer	Offset for paging through returned financial goals.	Optional	59.0
`orderBy`	String	Fully qualified developer name of the field used to sort the results.	Optional	59.0
`sortBy`	String	Sort the results by `Asc`	Optional	59.0

Name	Type	Description	Required or Optional	Available Version
		or `Desc` order.		

Response body for POST

Financial Goals List Output

Mortgage Application

Use a single API call to get and update mortgage application information like borrowers, declarations, incomes, addresses, financial transactions, liabilities, assets, properties, and title holders. You can use both the `loanApplicationId` and the `externalID` of an external system to get a mortgage application.

Resource

```
/connect/financialservices/mortgages/loanId
```

Available version

48.0

Authentication

Use OAuth to connect to Salesforce and get an access token. Pass the access token in your requests. For more information, see Connect to Connect REST API Using OAuth.

HTTP methods

GET, PATCH

Path Parameters

Parameter Name	Type	Description	Required	Available version
loanId	String	`id` or `externalId` associated with a loan application.	Yes	48.0

Request body JSON Example

```
{
  "amortizationTerm": 30
}
```

Response body for GET and PATCH

Property Name	Type	Description	Filter Group and Version	Available Version
`message`	String	Error message, if any.	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
result	Mortgage Information Output[]	Data of the mortgage result.	Small, 48.0	48.0

Sample response body for GET and PATCH


```
{
  "result" : {
    "accountId" : "001RM000004Xra2YAC",
    "assets" : [ ],
    "borrowers" : [ ],
    "createdById" : "005RM000001vbghYAA",
    "createdDate" : "2019-11-06T19:29:10.000Z",
    "extendedFields" : [ ],
    "externalId" : "tt2",
    "financials" : [ ],
    "hasOtherLoanFeature" : false,
    "hasPrepaymentPenalty" : false,
    "id" : "0cdRM00000000n5YAA",
    "isBalloon" : false,
    "isBorrowerInCommunityPropState" : false,
    "isConstructionToPermanent" : false,
    "isContractForDeed" : false,
    "isDeleted" : false,
    "isEnergyRelatedImprovement" : false,
    "isInterestOnly" : false,
    "isNegativeAmortization" : false,
    "isPropInCommunityPropState" : false,
    "isRenovation" : false,
    "isSingleClosing" : false,
    "isSubjectToPriorityLien" : false,
    "isTempIntRateBuydown" : false,
    "lastModifiedById" : "005RM000001vbghYAA",
    "lastModifiedDate" : "2019-11-06T19:31:07.000Z",
    "lastReferencedDate" : "2019-11-06T19:35:31.000Z",
    "lastViewedDate" : "2019-11-06T19:35:31.000Z",
    "liabilities" : [ ],
    "name" : "tt2",
    "ownerId" : "005RM000001vbghYAA",
    "properties" : [ ],
    "systemModstamp" : "2019-11-06T19:31:07.000Z",
    "titleHolders" : [ {
      "createdById" : "005RM000001vbghYAA",
      "createdDate" : "2019-11-06T19:29:10.000Z",
      "extendedFields" : [ ],
      "externalId" : "tt1",
      "id" : "0cTRM000000009e2AA",
      "isCurrentTitleHolder" : false,
      "isDeleted" : false,
      "lastModifiedById" : "005RM000001vbghYAA",
```

```
      "lastModifiedDate" : "2019-11-06T19:31:07.000Z",
      "lastReferencedDate" : "2019-11-06T19:31:07.000Z",
      "lastViewedDate" : "2019-11-06T19:31:07.000Z",
      "loanApplicationId" : "0cdRM00000000n5YAA",
      "name" : "tt2",
      "systemModstamp" : "2019-11-06T19:31:07.000Z"
    } ]
  }
}
```

Mortgage Applications

Create mortgage applications using the POST method.

A single API call lets you:

- Create records for objects like `ResidentialLoanApplication`, `LoanApplicant` `LoanApplicantAddress`, `LoanApplicantAsset`, `LoanApplicantDeclaration`, `LoanApplicantEmployment`, `LoanApplicantIncome`, `LoanApplicantLiability`, `LoanApplicationAsset`, `LoanApplicationFinancial`, `LoanApplicationLiability`, `LoanApplicationProperty`, and `LoanApplicationTitleHolder`.
- Add your org's custom fields with the `extendedFields` property for mortgage applications, borrowers, declarations, incomes, addresses, financial transactions, liabilities, assets, properties, and title holders information.
- Use IDs from external systems with the `externalId` parameter for mortgage applications, borrowers, declarations, incomes, addresses, financial transactions, liabilities, assets, properties, and title holders.

Resource

```
/connect/financialservices/mortgages
```

Available version

48.0

Authentication

Use OAuth to connect to Salesforce and get an access token. Pass the access token in your requests. For more information, see Connect to Connect REST API Using OAuth.

HTTP methods

POST

Request body

JSON example

```
{
  "accountId": "001RM000004XraFYAS",
  "amortizationTerm": 30,
  "amortizationType": "Adjustable Rate",
  "assets": [
    {
      "accountNumber": "849393",
      "accountType": "Checking",
      "assetClass": "Financial",
      "assetType": "Earnest Money",
      "borrowersExternalIds": [
        "0fc5e4d6-de5d-4954-9d21-3c628ad8809a",
```

```
        "732c3d7e-78ae-4b5e-944d-f411fb4011d4"
      ],
      "cashOrMarketValue": 434934903,
      "dispositionType": "Pending Sale",
      "extendedFields": [],
      "externalId": "df126729-19c0-4dc9-80c6-322bc6fb994c",
      "financialInstitutionName": "BOFA",
      "grossMonthlyRentalIncome": 355395355,
      "name": "Asset1",
      "netMonthlyRentalIncome": 2535345,
      "presentMarketValue": 7937399,
      "realEstateAddress": {
        "city": "San Francisco",
        "country": "CA",
        "street": "234 1st Street"
      },
      "realEstateMonthlyExpense": 3413131
    },
    {
      "accountNumber": "2424242424",
      "accountType": "Checking",
      "assetClass": "Real Estate",
      "assetType": "Earnest Money",
      "borrowersExternalIds": [
        "0fc5e4d6-de5d-4954-9d21-3c628ad8809a",
        "732c3d7e-78ae-4b5e-944d-f411fb4011d4"
      ],
      "cashOrMarketValue": 24424525,
      "dispositionType": "Sold",
      "extendedFields": [],
      "externalId": "a57f5b81-477b-41a3-a647-5852562913e5",
      "financialInstitutionName": "wells",
      "grossMonthlyRentalIncome": 24242224,
      "name": "Asset2",
      "netMonthlyRentalIncome": 242424234,
      "presentMarketValue": 2423131313,
      "realEstateAddress": {
        "city": "San Francisco",
        "country": "CA",
        "street": "123 2nd Street"
      },
      "realEstateMonthlyExpense": 2242423424
    }
  ],
  "balloonTermMonths": 3,
  "borrowers": [
    {
      "addresses": [
        {
          "addressOwnership": "Own",
          "extendedFields": [],
          "externalId": "e8d51e2a-7d97-4da0-8356-ca86995d3d39",
          "monthlyRentPayment": 2300,
          "name": "Addr1",
```

```
      "residenceAdditionalMonthCount": 23,
      "residenceAddress": {
        "city": "San Francisco",
        "country": "United States",
        "postalCode": "94105",
        "state": "CA",
        "street": "50 Fremont Street"
      },
      "residenceYearCount": 3,
      "residencyType": "Former Residence"
    }
  ],
  "asianRaceSubType": "Asian Indian",
  "borrowerType": "Borrower",
  "citizenshipStatus": "U.S. Citizen",
  "declarations": [
    {
      "bankruptcyType": "Chapter 11",
      "borrowedAmount": 20000,
      "extendedFields": [],
      "externalId": "be71c372-8290-44dc-bb73-6f6d1ce7e9a9",
      "hasBorrowedMoney": true,
      "hasCoSignerUndisclosedDebt": true,
      "hasDeclaredBankruptcy": true,
      "hasDeedSurrender": true,
      "hasOutstandingJudgement": true,
      "hasOwnershipInterest": true,
      "hasPastShortSale": true,
      "hasPropertyForeclosed": true,
      "hasUndisclosedAddCreditApp": true,
      "hasUndisclosedOtherPropLoan": true,
      "isPartyToLawsuit": true,
      "isPresentlyDelinquent": true,
      "isPrimaryResidence": true,
      "isRelatedToSeller": true,
      "name": "Decl1",
      "priorPropertyTitleType": "Yourself",
      "priorPropertyUsageType": "Secondary Residence"
    }
  ],
  "dependentCount": 2,
  "dependentsAge": "25,34",
  "employments": [
    {
      "currentJobAdditionalMonthCount": 24,
      "currentJobYearCount": 4,
      "employerAddress": {
        "city": "Fresno",
        "country": "United States",
        "postalCode": "93721",
        "state": "CA",
        "street": "1500 Divisadero Street"
      },
      "extendedFields": [],
```

```
        "externalId": "2a9460d0-3194-449a-8bf0-488a6cbaed0a",
        "isRelToTransactionParty": true,
        "isLessThanQuarterShare": true,
        "isSelfEmployed": true,
        "jobTitle": "developer",
        "monthlyBaseIncomeAmount": 2300,
        "monthlyBonusAmount": 100,
        "monthlyCommissionAmount": 10,
        "monthlyIncome": 5000,
        "monthlyMilitaryEntitlementAmt": 20,
        "monthlyOtherIncomeAmount": 10,
        "monthlyOvertimeAmount": 200,
        "name": "Empl1",
        "startDate": "2019-10-10T03:11:27.000Z"
      }
    ],
    "ethnicitySubType": "Mexican",
    "ethnicityType": "Not Hispanic or Latino",
    "extendedFields": [],
    "externalId": "0fc5e4d6-de5d-4954-9d21-3c628ad8809a",
    "genderType": "Female",
    "hasMilitaryService": true,
    "incomes": [
      {
        "extendedFields": [],
        "externalId": "b19d9372-df99-4eec-9de0-ad785503992d",
        "incomeSourceType": "Capital Gains",
        "monthlyIncomeAmount": 100,
        "name": "Income1"
      }
    ],
    "isActiveMilitary": true,
    "isJointCredit": true,
    "isSurvivingMilitarySpouse": true,
    "maritalStatus": "Married",
    "militaryTourExpirationMonth": 2,
    "militaryTourExpirationYear": 2027,
    "name": "BR1",
    "otherAsianRaceSubType": "Indian",
    "otherEthnicitySubType": "Mexico",
    "otherPacIslandSubType": "Test Pacific Islander",
    "pacificIslanderSubType": "Native Hawaiian",
    "preferredLanguage": "English",
    "raceType": "Asian",
    "tribeName": "Pacific Islander",
    "wasActiveMilitary": true,
    "wasNonActivatedService": true
  },
  {
    "addresses": [
      {
        "addressOwnership": "Rent",
        "extendedFields": [],
        "externalId": "86c168dd-a29c-4c0b-b366-51a40cd66c4b",
```

```
      "monthlyRentPayment": 5000,
      "name": "Addr2",
      "residenceAdditionalMonthCount": 24,
      "residenceAddress": {
        "city": "San Francisco",
        "country": "United States",
        "postalCode": "94115",
        "state": "CA",
        "street": "1500 Divisadero Street"
      },
      "residenceYearCount": 3,
      "residencyType": "Present Address"
    }
  ],
  "asianRaceSubType": "Asian Indian",
  "borrowerType": "CoBorrower",
  "citizenshipStatus": "U.S. Citizen",
  "declarations": [
    {
      "bankruptcyType": "Chapter 12",
      "borrowedAmount": 657575,
      "extendedFields": [],
      "externalId": "704e7cfd-932c-4a17-81ad-844fe1a007c6",
      "hasBorrowedMoney": true,
      "hasCoSignerUndisclosedDebt": true,
      "hasDeclaredBankruptcy": true,
      "hasDeedSurrender": true,
      "hasOutstandingJudgement": true,
      "hasOwnershipInterest": true,
      "hasPastShortSale": true,
      "hasPropertyForeclosed": true,
      "hasUndisclosedAddCreditApp": true,
      "hasUndisclosedOtherPropLoan": true,
      "isPartyToLawsuit": true,
      "isPresentlyDelinquent": true,
      "isPrimaryResidence": true,
      "isRelatedToSeller": true,
      "name": "Decl1",
      "priorPropertyTitleType": "Yourself",
      "priorPropertyUsageType": "Primary Residence"
    }
  ],
  "dependentCount": 2,
  "dependentsAge": "34,35",
  "employments": [
    {
      "currentJobAdditionalMonthCount": 24,
      "currentJobYearCount": 3,
      "employerAddress": {
        "city": "Fresno",
        "country": "United States",
        "postalCode": "93721",
        "state": "CA",
        "street": "2300 Stockton Street"
```

```
        },
        "extendedFields": [],
        "externalId": "34380cb7-95ca-4867-9a74-972af1be22db",
        "isRelToTransactionParty": true,
        "isLessThanQuarterShare": true,
        "isSelfEmployed": true,
        "jobTitle": "developer",
        "monthlyBaseIncomeAmount": 2400,
        "monthlyBonusAmount": 234,
        "monthlyCommissionAmount": 10,
        "monthlyIncome": 45668,
        "monthlyMilitaryEntitlementAmt": 20,
        "monthlyOtherIncomeAmount": 394,
        "monthlyOvertimeAmount": 123,
        "name": "Empl2",
        "startDate": "2019-10-10T03:11:27.000Z"
      }
    ],
    "ethnicitySubType": "Mexican",
    "ethnicityType": "Hispanic or Latino",
    "extendedFields": [],
    "externalId": "732c3d7e-78ae-4b5e-944d-f411fb4011d4",
    "genderType": "Female",
    "hasMilitaryService": true,
    "incomes": [
      {
        "extendedFields": [],
        "externalId": "91027067-09d3-45f2-a0fc-217ce1f63458",
        "incomeSourceType": "Child Support",
        "monthlyIncomeAmount": 200,
        "name": "Income1"
      }
    ],
    "isActiveMilitary": true,
    "isJointCredit": true,
    "isSurvivingMilitarySpouse": true,
    "maritalStatus": "Married",
    "militaryTourExpirationMonth": 3,
    "militaryTourExpirationYear": 2029,
    "name": "COB1",
    "otherAsianRaceSubType": "South india",
    "otherEthnicitySubType": "Mexico",
    "otherPacIslandSubType": "Test pacific Islander",
    "pacificIslanderSubType": "Guamanian or Chamorro",
    "preferredLanguage": "English",
    "raceType": "American Indian or Alaska Native",
    "tribeName": "Pacific Islander",
    "wasActiveMilitary": true,
    "wasNonActivatedService": true
  }
],
"estateHoldType": "Fee Simple",
"extendedFields": [],
"externalId": "0c4a3933-47d3-43d5-a2e6-09ae10e11a5e",
```

```
"financials": [
  {
    "borrowerClosingCostAmt": 95956,
    "counselingAgencyProviderName": "Test provider",
    "counselingCompleteBorrName": "BR1",
    "counselingCompletionDate": "2019-10-31T19:00:00.000Z",
    "creditFromSeller": 33342,
    "discountPointCostAmount": 59586,
    "estFirstMortgagePayment": 459677,
    "estHomeownerInsurancePayment": 35521,
    "estMortgageInsurancePayment": 2424555,
    "estOtherDuesPayment": 24354,
    "estOtherPayment": 323231,
    "estPropertyTaxesPayment": 422556,
    "estSubordinateLienPayment": 35453,
    "estSuppPropInsurancePayment": 44959,
    "extendedFields": [],
    "externalId": "af7e7c76-33ac-4005-b377-4b4663a49ec9",
    "financeMortgageInsuranceAmt": 353,
    "hasCompletedCounseling": true,
    "hasHomeownerEducation": true,
    "homeEdCompletedBorrowerName": "BR1",
    "homeownerEdCompleteDate": "2019-10-24T19:00:00.000Z",
    "homeownerEdFormat": "Attended Workshop in Person",
    "housingCounselingFormat": "Face-to-Face",
    "hudApproveAgencyId": "12344",
    "hudApprovedProviderId": "3532",
    "landAcquiredSeparatelyAmount": 2040,
    "loanAmtExclFinMortgageInsurance": 33345,
    "name": "Fin1",
    "otherCredit": 2242,
    "otherNewMortgageLoanAmt": 253535,
    "outstandingLoanAmount": 24505056,
    "purchasePriceAmount": 150000,
    "remodelAndRepairsAmount": 3040
  }
],
"hasOtherLoanFeature": true,
"hasPrepaymentPenalty": true,
"improvementCost": 100,
"initialBuydownRate": 401,
"interestOnlyMonthCount": 4,
"interestRate": 4,
"isBalloon": true,
"isBorrowerInCommunityPropState": true,
"isConstructionToPermanent": true,
"isContractForDeed": true,
"isEnergyRelatedImprovement": true,
"isInterestOnly": true,
"isNegativeAmortization": true,
"isPropInCommunityPropState": true,
"isRenovation": true,
"isSingleClosing": true,
"isSubjectToPriorityLien": true,
```

```
"isTempIntRateBuydown": true,
"leaseHoldExpirationDate": "2019-10-31T19:00:00.000Z",
"liabilities": [
  {
    "accountNumber": "134234242",
    "accountType": "Revolving",
    "borrowersExternalIds": [
      "0fc5e4d6-de5d-4954-9d21-3c628ad8809a",
      "732c3d7e-78ae-4b5e-944d-f411fb4011d4"
    ],
    "creditLimitAmount": 34353,
    "creditorName": "BOFA",
    "extendedFields": [],
    "externalId": "df126729-19c0-4dc9-80c6-322bc6fb994c",
    "isJointLiability": true,
    "liabilityClass": "Financial",
    "loanType": "Conventional",
    "monthlyPaymentAmount": 35353,
    "name": "Liab1",
    "otherLiabilityType": "Child Support",
    "shouldBePaidInFull": true,
    "unpaidBalanceAmount": 242
  },
  {
    "accountNumber": "464634123",
    "accountType": "Revolving",
    "borrowersExternalIds": [
      "0fc5e4d6-de5d-4954-9d21-3c628ad8809a",
      "732c3d7e-78ae-4b5e-944d-f411fb4011d4"
    ],
    "creditLimitAmount": 423465356,
    "creditorName": "CHase",
    "extendedFields": [],
    "externalId": "194bcc9c-7b86-4a49-9d17-fad0e4d205a3",
    "isJointLiability": true,
    "liabilityClass": "Financial",
    "loanType": "Conventional",
    "monthlyPaymentAmount": 2423535,
    "name": "Liab2",
    "otherLiabilityType": "Alimony",
    "shouldBePaidInFull": true,
    "unpaidBalanceAmount": 553
  }
],
"loanPurpose": "Purchase",
"lotAcquiredDate": "2019-10-31T19:00:00.000Z",
"lotOriginalCost": 200.3,
"monthsBeforeFirstAdj": 2,
"monthsBetweenAdjustments": 3,
"mortgageLienType": "First Lien",
"mortgageProgramType": "Conventional",
"name": "Loan1",
"nativeLandTenure": "Fee Simple (On a Reservation)",
"otherAmortizationType": "Test Amortization type",
```

```
  "otherLoanFeature": "Test Loan Feature",
  "otherLoanPurpose": "Test Loan Purpose",
  "otherMortgageProgramType": "Test program",
  "otherRefinanceProgType": "Test Refinance",
  "prepayPenaltyTermMonth": 5,
  "projectType": "Cooperative",
  "properties": [
    {
      "esMonthlyRentalIncome": 400506,
      "esNetMonthlyRentalIncome": 304056,
      "extendedFields": [],
      "externalId": "a57f5b81-477b-41a3-a647-5852562913e5",
      "isManufacturedHome": true,
      "isMixedUseProperty": true,
      "loanPurposeType": "Purchase",
      "name": "Prop1",
      "propertyUseType": "Primary Residence",
      "propertyValue": 50500555,
      "requestedLoanAmount": 5005000,
      "unitsFinancedCount": 5
    }
  ],
  "refinanceProgramType": "Full Documentation",
  "refinanceType": "No Cash Out",
  "status": "New",
  "titleHolders": [
    {
      "extendedFields": [],
      "externalId": "e8d51e2a-7d97-4da0-8356-ca86995d3d39",
      "isCurrentTitleHolder": true,
      "name": "T1",
      "titleHolderName": "Times"
    }
  ],
  "titleType": "Joint Tenancy with Right of Survivorship",
  "trustTitleType": "Title Will be Held by an Inter Vivos (Living) Trust"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`accountId`	String	Account associated with the application.	Required if `opportunityId` isn't provided	48.0
`amortizationTerm`	Integer	Duration of the amortization in months.	Optional	48.0
`amortizationType`	String	Amortization type for loan.	Optional	48.0
`assets`	Asset Input[]	Represents details about the borrower's and co-borrower's current personal and real property.	Optional	48.0

Name	Type	Description	Required or Optional	Available Version
balloonTermMonths	Integer	Number of months during which the cumulative loan must be repaid.	Optional	48.0
borrowers	Borrower Input[]	List of borrowers for a loan application.	Optional	48.0
estateHoldType	String	Lender's lien is on both land and structure (fee simple) or just structure (leasehold).	Optional	48.0
extendedFields	Extended Fields Input[]	Represents custom fields related to a loan application.	Optional	48.0
externalId	String	Identifier assigned to imported data by external data source (if applicable).	Optional	48.0
financials	Financial Input[]	Represents transaction details for a loan application.	Optional	48.0
hasOtherLoanFeature	Boolean	Indicates whether loan has other amortization feature.	Optional	48.0
hasPrepaymentPenalty	Boolean	Indicates whether penalty is incurred if borrower pays off loan balance before the loan term expires.	Optional	48.0
improvementCost	Double	Construction costs for a construction loan or home improvement costs for a renovation loan.	Optional	48.0
initialBuydownRate	Double	Initial lesser interest rate for the loan.	Optional	48.0
interestOnlyMonthCount	Integer	Number of months that loan payments are interest only.	Optional	48.0
interestRate	Double	Interest rate for loan.	Optional	48.0
isBalloon	Boolean	Indicates whether borrower is applying for a balloon payment mortgage.	Optional	48.0
isBorrowerCommunityPropState	Boolean	Indicates whether borrower lives in community property state.	Optional	48.0
isConstructionToPerm	Boolean	Indicates whether at least one borrower lives in a community property state.	Optional	48.0
isContractForDeed	Boolean	Indicates whether loan proceeds are to pay off balance due on a contract for deed or land contract.	Optional	48.0
isEnergyRelatedImprovement	Boolean	Indicates whether loan is to finance energy-related improvements.	Optional	48.0
isInterestOnly	Boolean	Indicates whether borrower is applying for an interest-only mortgage.	Optional	48.0

Name	Type	Description	Required or Optional	Available Version
isNegativeAmortization	Boolean	Indicates whether loan allows for negative amortization where shortfalls in interest payments are added to the outstanding loan balance.	Optional	48.0
isPropInCommunityPropState	Boolean	Indicates whether property is located in a community property state.	Optional	48.0
isRenovation	Boolean	Indicates whether loan proceeds to finance cost of renovations to the property, and renovation value is included in the property's appraised value.	Optional	48.0
isSingleClosing	Boolean	Indicates whether construction and permanent loans have a single combined closing. Once construction is complete, loan converts to a traditional mortgage.	Optional	48.0
isSubjectToPriorityLien	Boolean	Indicates whether property is currently subject to an energy-related lien that could take priority over the first mortgage lien.	Optional	48.0
isTempIntRateBuydown	Boolean	Indicates whether borrower is applying for loan with an initially reduced interest payment in exchange for an up-front cash deposit.	Optional	48.0
leaseHoldExpirationDate	String	Date when leasehold expires if land is leased.	Optional	48.0
liabilities	Liability Input[]	Represents details about the borrower and co-borrower current liabilities.	Optional	48.0
loanPurpose	String	Purpose of the loan.	Optional	48.0
lotAcquiredDate	String	Month and year property or land was purchased.	Optional	48.0
lotOriginalCost	Double	Original property cost (refinance) or original land cost (construction).	Optional	48.0
monthsBeforeFirstAdj	Integer	Initial period prior to first adjustment in months.	Optional	48.0
monthsBetweenAdjustments	Integer	Number of months before the first rate adjustment for an adjustable rate loan.	Optional	48.0
mortgageLienType	String	Type of mortgage lien associated with this loan application.	Optional	48.0

Name	Type	Description	Required or Optional	Available Version
mortgageProgramType	String	Type of mortgage program applied for.	Optional	48.0
name	String	Name of the residential loan application.	Required	48.0
nativeLandTenure	String	Property is located on an area reserved by or for an Indian land, village, or tribe to live on and use.	Optional	48.0
opportunityId	String	Opportunity associated with the application.	Required if accountId isn't provided	48.0
otherAmortizationType	String	Description of other amortization type for government loans.	Optional	48.0
otherLoanFeature	String	Description of other loan amortization feature.	Optional	48.0
otherLoanPurpose	String	What the borrower will use the loan for if other was specified.	Optional	48.0
otherMortgageProgramType	String	Description of the other mortgage type.	Optional	48.0
otherRefinanceProgType	String	Refinance program name if other was specified.	Optional	48.0
prepayPenaltyTermMonth	Integer	Number of months during which borrower incurs a penalty for early payoff of the loan balance.	Optional	48.0
projectType	String	Specifies the type of project that the property belongs to.	Optional	48.0
properties	Property Input[]	Represents details of the property the loan application finances.	Optional	48.0
refinanceProgramType	String	The applicable refinance program type based on the investor, guarantor, or lender guidelines.	Optional	48.0
refinanceType	String	Refinance loan type.	Optional	48.0
status	String	Indicates the current status of the loan application.	Optional	48.0
titleHolders	Title Holder Input[]	Represents details of borrowers who are applying to hold title to the property the loan application finances.	Optional	48.0
titleType	String	Way the borrower or borrowers take title for the loan.	Optional	48.0
trustTitleType	String	Title to be held in a living trust or a land trust.	Optional	48.0

Response body

Property Name	Type	Description	Filter Group and Version	Available Version
`message`	String	Error message, if any.	Small, 48.0	48.0
`result`	Mortgage Result[]	Representation of mortgage result.	Small, 48.0	48.0

Sample Response body


```
{
  "result" : {
    "assets" : [ {
      "externalId" : "df126729-19c0-4dc9-80c6-322bc6fb994c",
      "id" : "0cgRM0000000JABYA2"
    }, {
      "externalId" : "a57f5b81-477b-41a3-a647-5852562913e5",
      "id" : "0cgRM0000000JACYA2"
    } ],
    "borrowers" : [ {
      "addresses" : [ {
        "externalId" : "e8d51e2a-7d97-4da0-8356-ca86995d3d39",
        "id" : "0cjRM000000008VYAQ"
      } ],
      "declarations" : [ {
        "externalId" : "be71c372-8290-44dc-bb73-6f6d1ce7e9a9",
        "id" : "0cVRM000000008f2AA"
      } ],
      "employments" : [ {
        "externalId" : "2a9460d0-3194-449a-8bf0-488a6cbaed0a",
        "id" : "0ckRM00000000OhYAI"
      } ],
      "externalId" : "0fc5e4d6-de5d-4954-9d21-3c628ad8809a",
      "id" : "0cURM00000000K32AI",
      "incomes" : [ {
        "externalId" : "b19d9372-df99-4eec-9de0-ad785503992d",
        "id" : "0ciRM000000008GYAQ"
      } ]
    }, {
      "addresses" : [ {
        "externalId" : "86c168dd-a29c-4c0b-b366-51a40cd66c4b",
        "id" : "0cjRM000000008WYAQ"
      } ],
      "declarations" : [ {
        "externalId" : "704e7cfd-932c-4a17-81ad-844fe1a007c6",
        "id" : "0cVRM000000008g2AA"
      } ],
      "employments" : [ {
        "externalId" : "34380cb7-95ca-4867-9a74-972af1be22db",
        "id" : "0ckRM00000000OiYAI"
      } ],
      "externalId" : "732c3d7e-78ae-4b5e-944d-f411fb4011d4",
```

```
      "id" : "0cURM00000000K42AI",
      "incomes" : [ {
        "externalId" : "91027067-09d3-45f2-a0fc-217ce1f63458",
        "id" : "0ciRM000000008HYAQ"
      } ]
    } ],
    "externalId" : "0c4a3933-47d3-43d5-a2e6-09ae10e11a5e",
    "financials" : [ {
      "externalId" : "af7e7c76-33ac-4005-b377-4b4663a49ec9",
      "id" : "0cCRM00000000812AA"
    } ],
    "id" : "0cdRM00000000sUYAQ",
    "liabilities" : [ {
      "externalId" : "df126729-19c0-4dc9-80c6-322bc6fb994c",
      "id" : "0chRM0000000HjJYAU"
    }, {
      "externalId" : "194bcc9c-7b86-4a49-9d17-fad0e4d205a3",
      "id" : "0chRM0000000HjKYAU"
    } ],
    "properties" : [ {
      "externalId" : "a57f5b81-477b-41a3-a647-5852562913e5",
      "id" : "0cPRM000000007c2AA"
    } ],
    "titleHolders" : [ {
      "externalId" : "e8d51e2a-7d97-4da0-8356-ca86995d3d39",
      "id" : "0cTRM00000000Bf2AI"
    } ]
  }
}
```

Public Complaint

Create a customer complaint.

Streamline customer complaint management in Financial Services Cloud by orchestrating complaint workflows. Raise a customer complaint as part of the complaint workflow using this resource.

Resource

```
/connect/service-excellence/public-complaint
```

Resource Example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/service-excellence/public-complaint
```

Available version

58.0

Requires Chatter

No

HTTP methods

POST

Request body for POST

JSON example

```
{
    "assessmentId": "0U3RO0000000Cp20AE",
    "complaintInfo": {
        "incidentDate": "2022-04-07",
        "complaintType": "Information, sums/charges or product performance",
        "complaintSubType": "Product disclosure information",
        "status": "In Progress",
        "subject": "Account Annual Maintenance Charges",
        "priority": "High",
        "description": "Annual maintenance charges not disclosed upfront",
        "email": "Tody@email.com",
        "productType": "Credit Card or Prepaid Card",
        "additionalInfo": {
            "data": {
                "Comments": {
                    "value": "This case needs to be handled on priority"
                }
            }
        }
    },
    "caseInfo": {
        "accountId": "001RO000004WKi1YAG",
        "subject": "Reversal of Account Annual Maintenance Charges",
        "status": "Pending",
        "description": "Annual maintenance charges to be reversed",
        "origin": "Email",
        "reason": "Other",
        "additionalInfo": {
            "data": {
                "Priority": {
                    "value": "High"
                }
            }
        }
    },
    "caseParticipantInfo": {
        "data": [
            {
                "role": "Complainant Representative",
                "status": "Pending",
                "participantId": "001RO000004WKi1YAG",
                "preferredCallTimeFrom": "10:30:30",
                "preferredCallTimeTo": "12:30:30",
                "preferredCommunicationMode": "Email",
                "authorizationProof": "Email",
                "additionalInfo": {
                    "data": {
                        "Name": {
                          "value": "CP-0000000039"
                }
            }
```

```
        }
    },
    "documentInfo": {
        "data": [
            {
                "id": "069RO0000004YynYAE",
                "name": "Aadhar"
            },
            {
                "id": "069RO0000004p1lYAA",
                "name": "Pan",
                "typeId": ”0deRO00000000J7YAI”
            }
        ]
    },
    "shouldInclInRegulatoryRpt": true
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`assessmentId`	String	Pre-complaint assessment ID. Pre-complaint assessment contains a set of questions for the customer before creating a complaint. It helps to better understand the customer issue.	Optional	58.0
`caseInfo`	Case Info Wrapper	Details of the case to be created to address the complaint. A case is created by default when you raise a complaint. Use this field to add more details to the case.	Optional	58.0
`caseParticipantInfo`	Case Participant Info Wrapper[]	Details of the case participant raising the complaint. A case participant can be a customer or a customer representative.	Required	58.0
`complaintInfo`	Complaint Info Wrapper	Details of the complaint to be raised.	Required	58.0
`documentInfo`	Document Info Attributes Wrapper []	Details of the documents supporting the complaint.	Optional	58.0
`shouldInclInRegulatoryRpt`	Boolean	Indicates whether to include the complaint in regulatory reports (`true`) or not (`false`). The default value is `false`.	Optional	58.0

Response body for POST
Complaint Management Output

Record Alerts (Financial Accounts)

Retrieve a list of active record alerts on financial accounts.

The following is a list of alerts retrieved for a financial account:

- Alerts for the specified financial account.
- Alerts on financial transactions that are related to the financial account.

Resource

```
/financialservices/recordalerts/financialaccount/${financialAccountId}
```

Resource Examples

```
https://yourInstance.salesforce.com/services/data/vXX.X/financialservices
/recordalerts/financialaccount/a0URO000000Ccbz2AC
```

Available version
54.0

Requires Chatter
No

HTTP methods
GET

Response body for GET
Record Alert Collection

JSON example of response body

```
{
   "recordAlerts" : [ {
      "actions" : {
        "actionInfoCollection" : [ {
          "actionName" : "dismiss",
          "parameters" : [ ]
        }, {
          "actionName" : "snooze",
          "parameters" : [ "effectiveDate" ]
        } ]
      },
      "description" : "Alert description from external source system",
      "severity" : "Test",
      "source" : "External",
      "sourceSystemId" : "sourceSystemId",
      "subject" : "Test external subject",
      "whatId" : "a0URO000000Ccbz2AC"
   }, {
      "actions" : {
        "actionInfoCollection" : [ {
          "actionName" : "dismiss",
          "parameters" : [ ]
```

```
        }, {
          "actionName" : "snooze",
          "parameters" : [ "effectiveDate" ]
        } ]
      },
      "active" : true,
      "description" : "abc",
      "effectiveDate" : "2021-11-11T20:40:06.000Z",
      "id" : "0qZRO0000000000Q",
      "parentId" : "a0URO000000Ccbz",
      "recordAlertCategoryName" : "Fraud",
      "severity" : "Error",
      "source" : "Internal",
      "subject" : "Alert on FAT1",
      "validUntilDate" : "2022-03-10T20:00:00.000Z",
      "whatId" : "a0TRO000000DrWJ"
   }, {
      "actions" : {
        "actionInfoCollection" : [ {
          "actionName" : "dismiss",
          "parameters" : [ ]
        }, {
          "actionName" : "snooze",
          "parameters" : [ "effectiveDate" ]
        } ]
      },
      "active" : true,
      "description" : "Unauthorized transaction on card ending with -XXXX on Nov. 11,
2021 in Norfolk, VA",
      "effectiveDate" : "2021-11-03T19:00:00.000Z",
      "id" : "0qZRO000000003e",
      "recordAlertCategoryName" : "Fraud",
      "severity" : "Error",
      "source" : "Internal",
      "subject" : "Fraudulent Transaction",
      "validUntilDate" : "2022-11-10T20:00:00.000Z",
      "whatId" : "a0URO000000Ccbz"
   }, {
      "actions" : {
        "actionInfoCollection" : [ {
          "actionName" : "dismiss",
          "parameters" : [ ]
        }, {
          "actionName" : "snooze",
          "parameters" : [ "effectiveDate" ]
        } ]
      },
      "active" : true,
      "description" : "Transaction has an issue",
      "effectiveDate" : "2021-11-10T21:02:48.000Z",
      "id" : "0qZRO000000000u",
      "parentId" : "a0URO000000Ccbz",
      "recordAlertCategoryName" : "Fraud",
      "severity" : "Error",
```

```
      "source" : "Internal",
      "subject" : "Transaction has an issue",
      "validUntilDate" : "2021-12-17T20:00:00.000Z",
      "whatId" : "a0TRO000000DrWO"
   } ]
}
```

Record Alerts (Person Accounts)

Retrieve a list of active record alerts on person accounts.

The following is a list of alerts retrieved for a person account:

- Alerts for the specified person account.
- Alerts for the financial accounts owned by the person.
- Alerts on financial transactions that are related to the financial accounts.

Resource

```
/financialservices/recordalerts/person/${personId}
```

Resource Examples

```
https://yourInstance.salesforce.com/services/data/vXX.X/financialservices
/recordalerts/person/001RO000002Kn4BYAS
```

Available version

54.0

Requires Chatter

No

HTTP methods

GET

Response body for GET

Record Alert Collection

JSON example of response body

```
{
   "recordAlerts" : [ {
      "actions" : {
      "actionInfoCollection" : [ {
        "actionName" : "dismiss",
        "parameters" : [ ]
      }, {
        "actionName" : "snooze",
        "parameters" : [ "effectiveDate" ]
      } ]
      },
      "description" : "Alert description from an external source system",
      "severity" : "Test",
      "source" : "External",
      "sourceSystemId" : "sourceSystemId",
      "subject" : "foo apex subject",
      "whatId" : "001RO000002Kn4BYAS"
```

```
   }, {
      "actions" : {
        "actionInfoCollection" : [ {
          "actionName" : "dismiss",
          "parameters" : [ ]
        }, {
          "actionName" : "snooze",
          "parameters" : [ "effectiveDate" ]
        } ]
      },
      "active" : true,
      "description" : "Unauthorized transaction on card",
      "effectiveDate" : "2021-11-10T20:00:00.000Z",
      "id" : "0qZRO000000003Z",
      "recordAlertCategoryName" : "Fraud",
      "severity" : "Error",
      "source" : "Internal",
      "subject" : "Fraud Transaction 3",
      "validUntilDate" : "2022-11-10T20:00:00.000Z",
      "whatId" : "001RO000002Kn4B"
   }, {
      "actions" : {
        "actionInfoCollection" : [ {
          "actionName" : "dismiss",
          "parameters" : [ ]
        }, {
          "actionName" : "snooze",
          "parameters" : [ "effectiveDate" ]
        } ]
      },
      "active" : true,
      "description" : "Your card was used in a fraudulent transaction on 11/4/2021",
      "effectiveDate" : "2021-11-10T20:00:00.000Z",
      "id" : "0qZRO000000003K",
      "recordAlertCategoryName" : "Fraud",
      "severity" : "Error",
      "source" : "Internal",
      "subject" : "Fraud Transaction Alert",
      "validUntilDate" : "2022-11-04T19:00:00.000Z",
      "whatId" : "001RO000002Kn4B"
   } ]
}
```


Retrieval Summary

Get the data of a retrieval summary definition by using the root record ID and the retrieval summary defTinition ID.

Resource

```
/connect/retrieval-summary/runtime/retrievalSummaryDefinitionApiName/rootRecordId
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/retrieval-summary/runtime/HouseholdAPIForWealthManagement/001WS000003gjk2IAA
```

Available version
61.0

HTTP methods
GET

Request parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
`fetchRealTime`	Boolean	Indicates whether the household financial data has to be fetched in real time for financial accounts, financial holdings, assets and liabilities, and members of a household.	Optional	63.0

Response body for GET
Retrieval Summary Result on page 1232

Request Bodies

Here's a list of Financial Services Cloud Business API request bodies.

Address Input
Represents address details.

Asset Input
Represents details about the borrower's and co-borrower's current personal and real property.

Borrower Address Input
Input representation for Borrower addresses.

Borrower Declaration Input
Input representation for Borrower declarations

Borrower Employment Input
Represents details about the borrower's or co-borrower's current and past employment.

Borrower Income Input
Input representation for Borrower income

Borrower Input
Represents details of the borrower or co-borrower for the loan application.

Case Info Wrapper
Input representation of a case related to the complaint.

Case Participant Info Wrapper
Input representation of a case participant associated with the complaint.

Complaint Info Wrapper
Input representation of the complaint details.

Complaint Management Request Input

Input representation of the request to create a public complaint.

Document Info Attributes Wrapper

Input representation of the details of a supporting document for the complaint.

Ethoca Alert Callback Input

Ethoca alert input payload for transaction dispute management.

Ethoca Event

Ethoca event payload.

Ethoca Links

Ethoca resource link payload.

Extended Fields Input

Input representation for extended fields.

Filter Criteria

Filter criteria for queries of financial goals and households.

Financial Goal Create Input

Input for creating a single financial goal with goal members and funding.

Financial Goal Funding Input

Input for Financial Accounts that fund the Financial Goal.

Financial Goal Input

Input for creating or updating a financial goal.

Financial Goal List Create Input

Input for creating multiple financial goals with goal members.

Financial Goal Party Input

Input for adding or removing financial goal members.

Financial Goal Patch Input

Input for updating a financial goal.

Financial Goal Query Input

Query input for financial goals and goal members based on a parent record ID. The parent can be a Person Account or Household.

Financial Input

Input details for the financial transaction.

Generic Object Wrapper

Input representation of additional details of the case, case participant, or complaint.

Liability Input

Details about the borrower and co-borrower current liabilities.

Mapper Input Representation

Represents the input representation for the Mapper POST method.

Mortgage Input

Represents the input for mortgage POST or PATCH method.

Property Input

Represents details of the property the loan application finances.

Title Holder Input

Represents details of borrowers who are applying to hold title to the property the loan application finances.

Address Input

Represents address details.

Root XML tag

`<address>`

JSON example

```
{
  "city": "San Francisco",
  "country": "United States",
  "postalCode": "94105",
  "state": "CA",
  "street": "50 Fremont Street"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`city`	String	The address city.	Optional	48.0
`country`	String	The address country.	Optional	48.0
`postalCode`	String	The address postal code.	Optional	48.0
`state`	String	The address state.	Optional	48.0
`street`	String	The address street.	Optional	48.0

Asset Input

Represents details about the borrower's and co-borrower's current personal and real property.

Root XML tag

`<assets>`

JSON example

```
{
  "assets": [
    {
      "accountNumber": "849393",
      "accountType": "Checking",
      "assetClass": "Financial",
      "assetType": "Earnest Money",
      "borrowersExternalIds": [
        "0fc5e4d6-de5d-4954-9d21-3c628ad8809a",
        "732c3d7e-78ae-4b5e-944d-f411fb4011d4"
      ],
      "cashOrMarketValue": 434934903,
```

```
      "dispositionType": "Pending Sale",
      "extendedFields": [],
      "externalId": "df126729-19c0-4dc9-80c6-322bc6fb994c",
      "financialInstitutionName": "BOFA",
      "grossMonthlyRentalIncome": 355395355,
      "name": "Asset1",
      "netMonthlyRentalIncome": 2535345,
      "presentMarketValue": 7937399,
      "realEstateAddress": {
        "city": "San Francisco",
        "country": "CA",
        "street": "234 1st Street"
      },
      "realEstateMonthlyExpense": 3413131
    },
    {
      "accountNumber": "2424242424",
      "accountType": "Checking",
      "assetClass": "Real Estate",
      "assetType": "Earnest Money",
      "borrowersExternalIds": [
        "0fc5e4d6-de5d-4954-9d21-3c628ad8809a",
        "732c3d7e-78ae-4b5e-944d-f411fb4011d4"
      ],
      "cashOrMarketValue": 24424525,
      "dispositionType": "Sold",
      "extendedFields": [],
      "externalId": "a57f5b81-477b-41a3-a647-5852562913e5",
      "financialInstitutionName": "wells",
      "grossMonthlyRentalIncome": 24242224,
      "name": "Asset2",
      "netMonthlyRentalIncome": 242424234,
      "presentMarketValue": 2423131313,
      "realEstateAddress": {
        "city": "San Francisco",
        "country": "CA",
        "street": "123 2nd Street"
      },
      "realEstateMonthlyExpense": 2242423424
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`accountNumber`	String	Account number associated with financial institution holding asset.	Optional	48.0
`accountType`	String	Identifies asset account type.	Optional	48.0
`assetClass`	String	Identifies which asset class total to include the asset's value in.	Optional	48.0

Name	Type	Description	Required or Optional	Available Version
assetType	String	Identifies type of other asset.	Optional	48.0
borrowersExternalIds	String[]	External IDs of borrower and co-borrowers.	Optional	48.0
borrowersIds	String[]	IDs of borrower and co-borrowers.	Optional	48.0
cashOrMarketValue	Double	Asset's cash or current market value.	Optional	48.0
dispositionType	String	Real estate asset's planned future use.	Optional	48.0
extendedFields	Extended Fields Input[]	Custom fields related to the asset.	Optional	48.0
externalId	String	Identifier assigned to imported asset data by external data source (if applicable).	Optional	48.0
financialInstitutionName	String	Name of financial institution where financial account is held.	Optional	48.0
grossMonthlyRentalIncome	Double	Borrower's monthly rent income collected on real estate asset.	Optional	48.0
id	String	ID of the asset.	Optional	48.0
isJointAsset	Boolean	Indicates whether asset is held jointly.	Optional	48.0
name	String	Name of the loan application asset.	Optional	48.0
netMonthlyRentalIncome	Double	Borrower's net monthly income on real estate asset.	Optional	48.0
presentMarketValue	Double	Cash value of real estate asset if sold today.	Optional	48.0
realEstateAddress	Address Input[]	Real estate asset's address.	Optional	48.0
realEstateMonthlyExpense	Double	Borrower's monthly real estate asset expenses including insurance, maintenance, taxes, and miscellaneous costs.	Optional	48.0

Borrower Address Input

Input representation for Borrower addresses.

Root XML tag

```
<addresses>
```

JSON example

```
{
  "addresses": [
    {
      "addressOwnership": "Own",
      "extendedFields": [],
```

```
      "externalId": "e8d51e2a-7d97-4da0-8356-ca86995d3d39",
      "monthlyRentPayment": 2300,
      "name": "Addr1",
      "residenceAdditionalMonthCount": 23,
      "residenceAddress": {
        "city": "San Francisco",
        "country": "United States",
        "postalCode": "94105",
        "state": "CA",
        "street": "50 Fremont Street"
      },
      "residenceYearCount": 3,
      "residencyType": "Former Residence"
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
addressOwnership	String	Identifies borrower's status at residence.	Optional	48.0
extendedFields	Extended Fields Input[]	Custom fields related to the borrower's address.	Optional	48.0
externalId	String	Identifier assigned to imported borrower's address data by external data source. (if applicable)	Optional	48.0
id	String	ID of the borrower's address	Optional	48.0
monthlyRentPayment	Double	Borrower's monthly rent payment (if applicable).	Optional	48.0
name	String	Name of the borrower's address.	Optional	48.0
residenceAdditionalMonthCount	Integer	Additional months borrower lived at this residence.	Optional	48.0
residenceAddress	Address Input[]	Residence's physical address.	Optional	48.0
residenceYearCount	Integer	Years borrower lived at this residence.	Optional	48.0
residencyType	String	Identifies borrower's current residency status.	Optional	48.0

Borrower Declaration Input

Input representation for Borrower declarations

Root XML tag

```
<declarations>
```

JSON example

```
{
  "declarations": [
    {
      "bankruptcyType": "Chapter 11",
      "borrowedAmount": 20000,
      "extendedFields": [],
      "externalId": "be71c372-8290-44dc-bb73-6f6d1ce7e9a9",
      "hasBorrowedMoney": true,
      "hasCoSignerUndisclosedDebt": true,
      "hasDeclaredBankruptcy": true,
      "hasDeedSurrender": true,
      "hasOutstandingJudgement": true,
      "hasOwnershipInterest": true,
      "hasPastShortSale": true,
      "hasPropertyForeclosed": true,
      "hasUndisclosedAddCreditApp": true,
      "hasUndisclosedOtherPropLoan": true,
      "isPartyToLawsuit": true,
      "isPresentlyDelinquent": true,
      "isPrimaryResidence": true,
      "isRelatedToSeller": true,
      "name": "Decl1",
      "priorPropertyTitleType": "Yourself",
      "priorPropertyUsageType": "Secondary Residence"
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`bankruptcyType`	String	Bankruptcy type or types (if applicable).	Optional	48.0
`borrowedAmount`	Double	Amount of money borrowed for loan application transaction.	Optional	48.0
`extendedFields`	Extended Fields Input[]	Custom fields related to the declaration.	Optional	48.0
`externalId`	String	Identifier assigned to imported financial data by external data source (if applicable).	Optional	48.0
`hasBorrowedMoney`	Boolean	Indicates whether borrower is borrowing money for loan application transaction.	Optional	48.0
`hasCoSignerUndisclosedDebt`	Boolean	Indicates whether borrower is co-signer or guarantor on debt or loan that's not disclosed on loan application.	Optional	48.0
`hasDeclaredBankruptcy`	Boolean	Indicates whether borrower declared bankruptcy within the past seven years.	Optional	48.0

Name	Type	Description	Required or Optional	Available Version
hasDeedSurrender	Boolean	Indicates whether borrower conveyed title to a property in lieu of foreclosure in past seven years.	Optional	48.0
hasOutstandingJudgement	Boolean	Indicates whether there are one or more outstanding judgments against the borrower.	Optional	48.0
hasOwnershipInterest	Boolean	Indicates whether borrower had ownership interest in a property in the last three years.	Optional	48.0
hasPastShortSale	Boolean	Indicates whether borrower sold a property to a third party where lender agreed to accept amount less than total outstanding mortgage balance due within past seven years.	Optional	48.0
hasPropertyForeclosed	Boolean	Indicates whether borrower had property foreclosed upon in last seven years.	Optional	48.0
hasUndisclosedAddCreditApp	Boolean	Indicates whether, on or before closing, borrower applied for new undisclosed credit like a credit card or installment loan.	Optional	48.0
hasUndisclosedOtherPropLoan	Boolean	Indicates whether, on or before closing, borrower applied for an undisclosed mortgage loan on a property other than the application property.	Optional	48.0
id	String	ID of the borrower declaration.	Optional	48.0
isPartyToLawsuit	Boolean	Indicates whether borrower is party to lawsuit with potential personal financial liability.	Optional	48.0
isPresentlyDelinquent	Boolean	Indicates whether borrower is currently delinquent or in default on any federal debt or other loan, mortgage, financial obligation, bond, or loan guarantee.	Optional	48.0
isPrimaryResidence	Boolean	Indicates whether property to be borrower's primary residence.	Optional	48.0
isRelatedToSeller	Boolean	Indicates whether borrower has family or business relationship with seller of property (for purchase transaction).	Optional	48.0
isSubjectToPriorityLien	Boolean	Indicates whether application property is to have a priority clean energy lien like Property Assessed Clean Energy Program financing that takes priority over the first mortgage lien.	Optional	48.0

Name	Type	Description	Required or Optional	Available Version
name	String	Name of the declaration.	Optional	48.0
priorPropertyTitleType	String	Identifies how borrower held title in the ownership interest property.	Optional	48.0
priorPropertyUsageType	String	Identifies type of property borrower held ownership interest in.	Optional	48.0

Borrower Employment Input

Represents details about the borrower's or co-borrower's current and past employment.

Root XML tag

```
<employments>
```

JSON example

```
{
  "employments": [
    {
      "currentJobAdditionalMonthCount": 24,
      "currentJobYearCount": 4,
      "employerAddress": {
        "city": "Fresno",
        "country": "United States",
        "postalCode": "93721",
        "state": "CA",
        "street": "1500 Divisadero Street"
      },
      "extendedFields": [],
      "externalId": "2a9460d0-3194-449a-8bf0-488a6cbaed0a",
      "isRelToTransactionParty": true,
      "isLessThanQuarterShare": true,
      "isSelfEmployed": true,
      "jobTitle": "developer",
      "monthlyBaseIncomeAmount": 2300,
      "monthlyBonusAmount": 100,
      "monthlyCommissionAmount": 10,
      "monthlyIncome": 5000,
      "monthlyMilitaryEntitlementAmt": 20,
      "monthlyOtherIncomeAmount": 10,
      "monthlyOvertimeAmount": 200,
      "name": "Empl1",
      "startDate": "2019-10-10T03:11:27.000Z"
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
currentJobAdditionalMthCount	Integer	Additional number of months employed at this job (less than 12).	Optional	48.0
currentJobYearCount	Integer	Number of full years employed at this job.	Optional	48.0
employerAddress	Address Input[]	Address of borrower's employer or business.	Optional	48.0
employerName	String	Name of borrower's employer or business.	Optional	48.0
employerPhone	String	Employer's phone number.	Optional	48.0
endDate	String	Borrower's last date of employment at this job.	Optional	48.0
extendedFields	Extended Fields Input[]	Custom fields related to the borrower's employment.	Optional	48.0
externalId	String	Identifier assigned to imported employer data by external data source. (if applicable)	Optional	48.0
id	String	ID of the borrower's employment.	Optional	48.0
isLessThanQuarterShare	Boolean	Indicates whether borrower owns less than 25% of this business (if applicable).	Optional	48.0
isRelToTransactionParty	Boolean	Indicates whether borrower is employed by a family member, property seller, real estate agent, or other person party to the loan application transaction.	Optional	48.0
isSelfEmployed	Boolean	Indicates whether borrower is self-employed or owns the business.	Optional	48.0
jobTitle	String	Borrower's job title or employer's business or industry type.	Optional	48.0
monthlyBaseIncomeAmount	Double	Borrower's monthly bonus from this job.	Optional	48.0
monthlyBonusAmount	Double	Borrower's monthly bonus from this job.	Optional	48.0
monthlyCommissionAmount	Double	Borrower's monthly commission from this job.	Optional	48.0
monthlyIncome	Double	Borrower's monthly income or loss from this business.	Optional	48.0
monthlyMilitaryEntitlementAmt	Double	Borrower's monthly military entitlement from this job.	Optional	48.0
monthlyOtherIncomeAmount	Double	Borrower's other monthly income from this job.	Optional	48.0

Name	Type	Description	Required or Optional	Available Version
monthlyOvertimeAmount	Double	Borrower's monthly overtime income from this job.	Optional	48.0
name	String	Name of the loan applicant employment.	Optional	48.0
startDate	String	Date borrower started working at this job.	Optional	48.0

Borrower Income Input

Input representation for Borrower income

Root XML tag

```
<incomes>
```

JSON example

```
{
  "incomes": [
    {
      "extendedFields": [],
      "externalId": "b19d9372-df99-4eec-9de0-ad785503992d",
      "incomeSourceType": "Capital Gains",
      "monthlyIncomeAmount": 100,
      "name": "Income1"
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
extendedFields	Extended Fields Input[]	Custom fields related to the borrower's income.	Optional	48.0
externalId	String	Identifier assigned to imported income data by external data source (if applicable).	Optional	48.0
id	String	ID of the borrower's income.	Optional	48.0
incomeSourceType	String	Source of borrower's monthly non-employment income.	Optional	48.0
monthlyIncomeAmount	Double	Amount of borrower's monthly non-employment income from this source.	Optional	48.0
name	String	Name of the other monthly income.	Optional	48.0

Borrower Input

Represents details of the borrower or co-borrower for the loan application.

Root XML tag

```
<borrowers>
```

JSON example

```
{
  "borrowers": [
    {
      "addresses": [
        {
          "addressOwnership": "Own",
          "extendedFields": [],
          "externalId": "e8d51e2a-7d97-4da0-8356-ca86995d3d39",
          "monthlyRentPayment": 2300,
          "name": "Addr1",
          "residenceAdditionalMonthCount": 23,
          "residenceAddress": {
            "city": "San Francisco",
            "country": "United States",
            "postalCode": "94105",
            "state": "CA",
            "street": "50 Fremont Street"
          },
          "residenceYearCount": 3,
          "residencyType": "Former Residence"
        }
      ],
      "asianRaceSubType": "Asian Indian",
      "borrowerType": "Borrower",
      "citizenshipStatus": "U.S. Citizen",
      "declarations": [
        {
          "bankruptcyType": "Chapter 11",
          "borrowedAmount": 20000,
          "extendedFields": [],
          "externalId": "be71c372-8290-44dc-bb73-6f6d1ce7e9a9",
          "hasBorrowedMoney": true,
          "hasCoSignerUndisclosedDebt": true,
          "hasDeclaredBankruptcy": true,
          "hasDeedSurrender": true,
          "hasOutstandingJudgement": true,
          "hasOwnershipInterest": true,
          "hasPastShortSale": true,
          "hasPropertyForeclosed": true,
          "hasUndisclosedAddCreditApp": true,
          "hasUndisclosedOtherPropLoan": true,
          "isPartyToLawsuit": true,
          "isPresentlyDelinquent": true,
          "isPrimaryResidence": true,
          "isRelatedToSeller": true,
          "name": "Decl1",
          "priorPropertyTitleType": "Yourself",
          "priorPropertyUsageType": "Secondary Residence"
        }
      ],
```

```
"dependentCount": 2,
"dependentsAge": "25,34",
"employments": [
  {
    "currentJobAdditionalMonthCount": 24,
    "currentJobYearCount": 4,
    "employerAddress": {
      "city": "Fresno",
      "country": "United States",
      "postalCode": "93721",
      "state": "CA",
      "street": "1500 Divisadero Street"
    },
    "extendedFields": [],
    "externalId": "2a9460d0-3194-449a-8bf0-488a6cbaed0a",
    "isRelToTransactionParty": true,
    "isLessThanQuarterShare": true,
    "isSelfEmployed": true,
    "jobTitle": "developer",
    "monthlyBaseIncomeAmount": 2300,
    "monthlyBonusAmount": 100,
    "monthlyCommissionAmount": 10,
    "monthlyIncome": 5000,
    "monthlyMilitaryEntitlementAmt": 20,
    "monthlyOtherIncomeAmount": 10,
    "monthlyOvertimeAmount": 200,
    "name": "Empl1",
    "startDate": "2019-10-10T03:11:27.000Z"
  }
],
"ethnicitySubType": "Mexican",
"ethnicityType": "Not Hispanic or Latino",
"extendedFields": [],
"externalId": "0fc5e4d6-de5d-4954-9d21-3c628ad8809a",
"genderType": "Female",
"hasMilitaryService": true,
"incomes": [
  {
    "extendedFields": [],
    "externalId": "b19d9372-df99-4eec-9de0-ad785503992d",
    "incomeSourceType": "Capital Gains",
    "monthlyIncomeAmount": 100,
    "name": "Income1"
  }
],
"isActiveMilitary": true,
"isJointCredit": true,
"isSurvivingMilitarySpouse": true,
"maritalStatus": "Married",
"militaryTourExpirationMonth": 2,
"militaryTourExpirationYear": 2027,
"name": "BR1",
"otherAsianRaceSubType": "Indian",
"otherEthnicitySubType": "Mexico",
```

```
    "otherPacIslandSubType": "Test Pacific Islander",
    "pacificIslanderSubType": "Native Hawaiian",
    "preferredLanguage": "English",
    "raceType": "Asian",
    "tribeName": "Pacific Islander",
    "wasActiveMilitary": true,
    "wasNonActivatedService": true
  },
  {
    "addresses": [
      {
        "addressOwnership": "Rent",
        "extendedFields": [],
        "externalId": "86c168dd-a29c-4c0b-b366-51a40cd66c4b",
        "monthlyRentPayment": 5000,
        "name": "Addr2",
        "residenceAdditionalMonthCount": 24,
        "residenceAddress": {
          "city": "San Francisco",
          "country": "United States",
          "postalCode": "94115",
          "state": "CA",
          "street": "1500 Divisadero Street"
        },
        "residenceYearCount": 3,
        "residencyType": "Present Address"
      }
    ],
    "asianRaceSubType": "Asian Indian",
    "borrowerType": "CoBorrower",
    "citizenshipStatus": "U.S. Citizen",
    "declarations": [
      {
        "bankruptcyType": "Chapter 12",
        "borrowedAmount": 657575,
        "extendedFields": [],
        "externalId": "704e7cfd-932c-4a17-81ad-844fe1a007c6",
        "hasBorrowedMoney": true,
        "hasCoSignerUndisclosedDebt": true,
        "hasDeclaredBankruptcy": true,
        "hasDeedSurrender": true,
        "hasOutstandingJudgement": true,
        "hasOwnershipInterest": true,
        "hasPastShortSale": true,
        "hasPropertyForeclosed": true,
        "hasUndisclosedAddCreditApp": true,
        "hasUndisclosedOtherPropLoan": true,
        "isPartyToLawsuit": true,
        "isPresentlyDelinquent": true,
        "isPrimaryResidence": true,
        "isRelatedToSeller": true,
        "name": "Decl1",
        "priorPropertyTitleType": "Yourself",
        "priorPropertyUsageType": "Primary Residence"
```

```
    }
  ],
  "dependentCount": 2,
  "dependentsAge": "34,35",
  "employments": [
    {
      "currentJobAdditionalMonthCount": 24,
      "currentJobYearCount": 3,
      "employerAddress": {
        "city": "Fresno",
        "country": "United States",
        "postalCode": "93721",
        "state": "CA",
        "street": "2300 Stockton Street"
      },
      "extendedFields": [],
      "externalId": "34380cb7-95ca-4867-9a74-972af1be22db",
      "isRelToTransactionParty": true,
      "isLessThanQuarterShare": true,
      "isSelfEmployed": true,
      "jobTitle": "developer",
      "monthlyBaseIncomeAmount": 2400,
      "monthlyBonusAmount": 234,
      "monthlyCommissionAmount": 10,
      "monthlyIncome": 45668,
      "monthlyMilitaryEntitlementAmt": 20,
      "monthlyOtherIncomeAmount": 394,
      "monthlyOvertimeAmount": 123,
      "name": "Empl2",
      "startDate": "2019-10-10T03:11:27.000Z"
    }
  ],
  "ethnicitySubType": "Mexican",
  "ethnicityType": "Hispanic or Latino",
  "extendedFields": [],
  "externalId": "732c3d7e-78ae-4b5e-944d-f411fb4011d4",
  "genderType": "Female",
  "hasMilitaryService": true,
  "incomes": [
    {
      "extendedFields": [],
      "externalId": "91027067-09d3-45f2-a0fc-217ce1f63458",
      "incomeSourceType": "Child Support",
      "monthlyIncomeAmount": 200,
      "name": "Income1"
    }
  ],
  "isActiveMilitary": true,
  "isJointCredit": true,
  "isSurvivingMilitarySpouse": true,
  "maritalStatus": "Married",
  "militaryTourExpirationMonth": 3,
  "militaryTourExpirationYear": 2029,
  "name": "COB1",
```

```
      "otherAsianRaceSubType": "South india",
      "otherEthnicitySubType": "Mexico",
      "otherPacIslandSubType": "Test pacific Islander",
      "pacificIslanderSubType": "Guamanian or Chamorro",
      "preferredLanguage": "English",
      "raceType": "American Indian or Alaska Native",
      "tribeName": "Pacific Islander",
      "wasActiveMilitary": true,
      "wasNonActivatedService": true
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`addresses`	Borrower Address Input[]	Borrower's addresses.	Optional	48.0
`asianRaceSubType`	String	Borrower's Asian race.	Optional	48.0
`borrowerType`	String	Applicant's borrower type.	Optional	48.0
`citizenshipStatus`	String	Borrower's citizenship status.	Optional	48.0
`contactId`	String	Contact associated with this borrower.	Optional	48.0
`declarations`	Borrower Declaration Input[]	Borrower's declarations.	Optional	48.0
`dependentCount`	Integer	Borrower's number of dependents.	Optional	48.0
`dependentsAge`	String	Ages of borrower's dependents in a comma-separated list.	Optional	48.0
`employments`	Borrower Employment Input[]	Borrower's employments.	Optional	48.0
`ethnicitySubType`	String	Borrower's ethnicity.	Optional	48.0
`ethnicityType`	String	Borrower's ethnicity origin.	Optional	48.0
`extendedFields`	Extended Fields Input[]	Custom fields.	Optional	48.0
`externalId`	String	ID that uniquely identifies imported data in an external data source (if applicable).	Optional	48.0
`genderType`	String	Borrower's gender.	Optional	48.0
`hasMilitaryService`	Boolean	Indicates whether the borrower is serving in the United States Armed Forces or the borrower or the borrower's deceased spouse served in the past.	Optional	48.0

Name	Type	Description	Required or Optional	Available Version
id	String	ID of the borrower.	Optional	48.0
incomes	Borrower Income Input[]	Borrower's incomes.	Optional	48.0
isActiveMilitary	Boolean	Indicates whether borrower is currently on active duty with the United States Armed Forces.	Optional	48.0
isJointCredit	Boolean	Indicates whether borrower is applying for joint credit.	Optional	48.0
isSurvivingMilitarySpouse	Boolean	Indicates whether borrower is a surviving spouse of a veteran.	Optional	48.0
maritalStatus	String	Borrower's marital status.	Optional	48.0
militaryTourExpirationMonth	Integer	Month that borrower's tour of service expires.	Optional	48.0
militaryTourExpirationYear	Integer	Year that borrower's tour of service expires.	Optional	48.0
name	String	Name of the borrower.	Optional	48.0
otherAsianRaceSubType	String	Borrower's Asian race if other is specified.	Optional	48.0
otherEthnicitySubType	String	Borrower's ethnicity if other is specified.	Optional	48.0
otherPacIslandSubType	String	Borrower's native Hawaiian or Pacific Islander race if other is specified.	Optional	48.0
pacificIslanderSubType	String	Borrower's native Hawaiian or Pacific Islander race.	Optional	48.0
preferredLanguage	String	Borrower's preferred communication language.	Optional	48.0
raceType	String	Borrower's race.	Optional	48.0
tribeName	String	Name of borrower's enrolled or principal tribe.	Optional	48.0
wasActiveMilitary	Boolean	Indicates whether borrower is currently retired, discharged, or separated from active military duty.	Optional	48.0
wasNonActivatedService	Boolean	Indicates whether borrower's only military service was as a non-activated Reserve soldier or as a non-activated member of the National Guard.	Optional	48.0

Case Info Wrapper

Input representation of a case related to the complaint.

Properties

Name	Type	Description	Required or Optional	Available Version
`accountId`	String	ID of the account associated with the complainant.	Optional	58.0
`additionalInfo`	Map<String, Generic Object Wrapper>	Additional information about the case.	Optional	58.0
`description`	String	Description of the case.	Optional	58.0
`origin`	String	Origin of the case. Possible values are: • `Email` • `Phone` • `Web`	Optional	58.0
`reason`	String	Reason for creating the case. Possible values are: • `Breakdown` • `Equipment Complexity` • `Equipment Design` • `Feedback` • `Installation` • `Other` • `Performance`	Optional	58.0
`status`	String	Status of the case. Possible values are: • `Escalated` • `In Progress` • `New` • `On Hold` • `Response Received` • `Submitted` • `Waiting for Customer` • `Working`	Optional	58.0
`subject`	String	Subject of the case.	Optional	58.0

Case Participant Info Wrapper

Input representation of a case participant associated with the complaint.

Properties

Name	Type	Description	Required or Optional	Available Version
`additionalInfo`	Map<String, Generic Object Wrapper>	Additional information about the case participant.	Optional	58.0
`authorizationProof`	String	Proof of authorization for the case participant. Possible values are: • `Email Consent` • `Verbal Consent` • `Power of Attorney` • `Joint Ownership`	Required when the complainant is a customer representative, otherwise optional	58.0
`participantId`	String	Case participant's account ID.	Required	58.0
`preferredCallTimeFrom`	String	Preferred time window to call the case participant.	Optional	58.0
`preferredCallTimeTo`	String	Preferred time window to call the case participant.	Optional	58.0
`preferredCommunicationMode`	String	Preferred mode of communication by the case participant to get updates related to the complaint.	Optional	58.0
`role`	String	Role of the case participant. Possible values are: • `Complainant` • `Complainant Representative`	Optional	58.0
`status`	String	Status of the case related to the participant. Possible values are: • `Active` • `In Review` • `Pending` • `Submitted`	Optional	58.0

Complaint Info Wrapper

Input representation of the complaint details.

Properties

Name	Type	Description	Required or Optional	Available Version
`accountId`	String	ID of the account associated with the complainant.	Optional	58.0
`additionalInfo`	Map<String, Generic Object Wrapper>	Additional details of the complaint.	Optional	58.0
`complaintSubType`	String	Subtype of the complaint. Possible values are: • `Account Opening/Closure` • `Attempts to Collect Debt not Owed` • `Auto Debit Mandate` • `Cash not Dispensed` • `Communication Tactics` • `Credit Limit Changed` • `Credit Report / Credit Score` • `Delays / Timescales` • `Disputes over sum/charges` • `Errors / not following instructions` • `Fraud Handling` • `Inaccessible ATMs` • `Inaccessible Branch Entrances` • `Inaccessible Website` • `Inaccessible Mobile banking features` • `Misleading Advertising` • `Mobile Banking - Features or Functionality` • `No Written Notification About Debt` • `Online Banking Features or Functionality` • `Other General Admin/Customer Service`	Required	58.0

Name	Type	Description	Required or Optional	Available Version
		• Others • Problem when Making Payments • Product Disclosure Information • Product Performance/Features • Unauthorized Transaction(s)Unclear Arrangement • Unclear Guidance • Unsuitable Advice		
complaintType	String	Type of the complaint. Possible values are: • Accessibility Issues • Advising, Selling and Arranging • Digital or Technology • Financial Hardships or Collections • General Admin/ Customer Service • Information, sums/charges or product performance • Lending / Credit • Marketing or Corporate Communications • Others • Transaction Related	Required	58.0
description	String	Description of the complaint.	Optional	58.0
email	String	Email ID of the complainant.	Optional	58.0
incidentDate	String	Date the complaint-related incident occurred.	Required	58.0
priority	String	Priority of the complaint. Possible values are: • Critical • High • Low	Optional	58.0

Name	Type	Description	Required or Optional	Available Version
		• `Medium` The default value is `Medium`.		
`productType`	String	Product type related to the complaint. Possible values are: • `ATM / debit card` • `Credit Card or Prepaid Card` • `Insurance` • `Investments` • `Merchant Services` • `Mobile / electronic banking` • `Money transfers, virtual currency, and money services` • `Mortgage / Home Finance` • `Other` • `Personal Loan / other loans` • `Vehicle loan or lease`	Optional	58.0
`receivedDate`	String	Date of reporting for the complaint.	Required	58.0
`status`	String	Resolution status of the complaint. Possible values are: • `In Review` • `Pending` • `Resolved` • `Submitted` The default value is `Submitted`.	Optional	58.0
`subject`	String	Subject of the complaint.	Optional	58.0

Complaint Management Request Input

Input representation of the request to create a public complaint.

JSON example

```
{
    "assessmentId": "0U3RO0000000Cp20AE",
    "complaintInfo": {
        "incidentDate": "2022-04-07",
```

```
    "complaintType": "Information, sums/charges or product performance",
    "complaintSubType": "Product disclosure information",
    "status": "In Progress",
    "subject": "Account Annual Maintenance Charges",
    "priority": "High",
    "description": "Annual maintenance charges not disclosed upfront",
    "email": "Tody@email.com",
    "productType": "Credit Card or Prepaid Card",
    "additionalInfo": {
        "data": {
            "Comments": {
                "value": "This case needs to be handled on priority"
            }
        }
    }
},
"caseInfo": {
    "accountId": "001RO000004WKi1YAG",
    "subject": "Reversal of Account Annual Maintenance Charges",
    "status": "Pending",
    "description": "Annual maintenance charges to be reversed",
    "origin": "Email",
    "reason": "Other",
    "additionalInfo": {
        "data": {
            "Priority": {
                "value": "High"
            }
        }
    }
},
"caseParticipantInfo": {
    "data": [
        {
            "role": "Complainant Representative",
            "status": "Pending",
            "participantId": "001RO000004WKi1YAG",
            "preferredCallTimeFrom": "10:30:30",
            "preferredCallTimeTo": "12:30:30",
            "preferredCommunicationMode": "Email",
            "authorizationProof": "Email",
            "additionalInfo": {
                "data": {
                    "Name": {
                      "value": "CP-0000000039"
                }
            }
        }
    }
},
"documentInfo": {
    "data": [
        {
            "id": "069RO00000004YynYAE",
            "name": "Aadhar"
```

```
            },
            {
                "id": "069RO0000004p1lYAA",
                "name": "Pan",
                "typeId": ”0deRO00000000J7YAI”
            }
        ]
    },
    "shouldInclInRegulatoryRpt": true
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`assessmentId`	String	Pre-complaint assessment ID. Pre-complaint assessment contains a set of questions for the customer before creating a complaint. It helps to better understand the customer issue.	Optional	58.0
`caseInfo`	Case Info Wrapper	Details of the case to be created to address the complaint. A case is created by default when you raise a complaint. Use this field to add more details to the case.	Optional	58.0
`caseParticipantInfo`	Case Participant Info Wrapper[]	Details of the case participant raising the complaint. A case participant can be a customer or a customer representative.	Required	58.0
`complaintInfo`	Complaint Info Wrapper	Details of the complaint to be raised.	Required	58.0
`documentInfo`	Document Info Attributes Wrapper []	Details of the documents supporting the complaint.	Optional	58.0
`shouldInclInRegulatoryRpt`	Boolean	Indicates whether to include the complaint in regulatory reports (`true`) or not (`false`). The default value is `false`.	Optional	58.0

Document Info Attributes Wrapper

Input representation of the details of a supporting document for the complaint.

Properties

Name	Type	Description	Required or Optional	Available Version
`id`	String	ID of the supporting content document.	Required	58.0
`name`	String	Name of the supporting content document.	Required	58.0
`typeId`	String	ID of the supporting content document type.	Optional	58.0

Ethoca Alert Callback Input

Ethoca alert input payload for transaction dispute management.

JSON example

```
{
  "ethocaInputPayload": {
    "events": [
      {
        "id": "3a375ce5-5e1d-40a7-97b5-1514a0876364",
        "eventType": "Batch Processed",
        "resourceLink": {
          "resource":
"https://www.ethocaweb.com/ethoca-rest/rest/api/v1/transactions/batch/3a375ce5-5e1d-40a7-97b5-1514a0876364"

        }
      },
      {
        "id": "3a375ce5-5e1d-40a7-97b5-1514a0876365",
        "eventType": "Batch Processed",
        "resourceLink": {
          "resource":
"https://www.ethocaweb.com/ethoca-rest/rest/api/v1/transactions/batch/3a375ce5-5e1d-40a7-97b5-1514a0876365"

        }
      }
    ]
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`ethocaInput Payload`	Ethoca Event on page 1168[]	Ethoca event input payload.	Required	60.0

Ethoca Event

Ethoca event payload.

JSON example

```
{
  "id": "3a375ce5-5e1d-40a7-97b5-1514a0876364",
  "eventType": "Batch Processed",
  "resourceLink": {
    "resource":
"https://www.ethocaweb.com/ethoca-rest/rest/api/v1/transactions/batch/3a375ce5-5e1d-40a7-97b5-1514a0876364"

  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`eventType`	String	Type of event.	Required	60.0
`id`	String	ID of the event.	Required	60.0
`resourceLink`	Ethoca Links	Resource link for the event.	Required	60.0

Ethoca Links

Ethoca resource link payload.

JSON example

```
{
  "resource":
"https://www.ethocaweb.com/ethoca-rest/rest/api/v1/transactions/batch/3a375ce5-5e1d-40a7-97b5-1514a0876364"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`resource`	String	Resource link.	Required	60.0

Extended Fields Input

Input representation for extended fields.

Root XML tag

`<extendedFields>`

JSON example

```
{
  "extendedFields": [
```

```
    {
      "name": "assigned_to",
      "value": "abcd"
    },
    {
      "name": "ownership",
      "value": true
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`name`	String	Name of the custom field.	Optional	48.0
`value`	String	Value of the custom field.	Optional	48.0

Filter Criteria

Filter criteria for queries of financial goals and households.

JSON example

```
{
  "fieldName": "AccountContactRelation.Roles",
  "operator": "in",
  "value": "BusinessUser,DecisionMaker"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`fieldName`	String	API Name of the field used in the filter.	Required	59.0
`operator`	String	Operator used in the filter. Valid values are: • `equals` • `not equals` • `in`	Required	59.0
`value`	String	Value of the field used in the filter.	Required	59.0

Financial Goal Create Input

Input for creating a single financial goal with goal members and funding.

JSON example

In this example, `carType`, `role`, and `FSC9__FinancialAccount__c` are custom fields.

```
{
  "financialGoal": {
    "actualAmount": "$1000.00",
    "completionDate": "2024-05-01",
    "initialAmount": "$500.00",
    "description": "Car for commuting",
    "priority": "P1",
    "startDate": "2023-05-01",
    "status": "InProgress",
    "targetAmount": "$50000.00",
    "targetDate": "2024-05-01",
    "name": "Goal1",
    "type": "Auto",
    "customFields": {
      "carType": "New luxury car"
    }
  },
  "financialGoalParties": [
    {
      "accountId": "001xx000003GYyJAAW",
      "customFields": {
        "role": "Auto purchaser"
      }
    },
    {
      "accountId": "001xx000005dJCxYAM",
      "customFields": {
        "role": "Auto purchaser partner"
      }
    }
  ],
  "financialGoalFundings": [
    {
      "amount": 1000,
      "currencyIsoCode": "USD",
      "customFields": {
        "FSC9__FinancialAccount__c": "a0HSG0000000AfJ2AU"
      }
    },
    {
      "amount": 2000,
      "currencyIsoCode": "USD",
      "customFields": {
        "FSC9__FinancialAccount__c": "a0HSG0000000AfJ2AV"
      }
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`financialGoal`	Financial Goal Input	Financial Goal data.	At least one required	59.0
`financialGoalFundings`	Financial Goal Funding Input[]	Financial Accounts that fund the Financial Goal.	Optional	60.0
`financialGoalParties`	Financial Goal Party Input[]	Goal members to be included in the Financial Goal.	At least one per goal required	59.0

Financial Goal Funding Input

Input for Financial Accounts that fund the Financial Goal.

JSON example

```
{
  "financialGoalFundings": [
    {
      "amount": 1000,
      "currencyIsoCode": "USD",
      "customFields": {
        "FSC9__FinancialAccount__c": "a0HSG0000000AfJ2AU"
      }
    },
    {
      "amount": 2000,
      "currencyIsoCode": "USD",
      "customFields": {
        "FSC9__FinancialAccount__c": "a0HSG0000000AfJ2AV"
      }
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`amount`	Double	Amount funded by the funding source.	Required	60.0
`currencyIsoCode`	String	Currency ISO code for the currency fields.	Optional	60.0
`customFields`	Map<String, Object>	Financial Goal funding custom fields.	Optional	60.0

Financial Goal Input

Input for creating or updating a financial goal.

JSON example

In this example, `carType` is a custom field.

```
{
  "actualAmount": "$1000.00",
  "completionDate": "2024-05-01",
  "initialAmount": "$500.00",
  "description": "Car for commuting",
  "priority": "P1",
  "startDate": "2023-05-01",
  "status": "InProgress",
  "targetAmount": "$50000.00",
  "targetDate": "2024-05-01",
  "name": "Goal1",
  "type": "Auto",
  "customFields": {
    "carType": "New luxury car"
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`actualAmount`	String	The amount currently in the account associated with this goal.	Required for create, optional for update	59.0
`category`	String	The category of the goal.	Optional	60.0
`completionDate`	String	The date at which this goal reaches the `targetAmount`.	Required for create, optional for update	59.0
`currencyIsoCode`	String	Currency ISO code for the currency fields.	Optional	60.0
`customFields`	Map<String, Object>	Any custom fields added for a particular banking institution.	Optional	59.0
`description`	String	A description of this goal.	Required for create, optional for update	59.0
~~`estimatedSuccessPercent`~~	String	The success percentage estimated for the financial goal.	Optional	60.0
`financialPlanId`	String	The ID of the associated financial plan.	Optional	60.0
`frequency`	String	The frequency at which the money is withdrawn. Values are: • Monthly • Weekly • Annually	Optional	60.0

Name	Type	Description	Required or Optional	Available Version
`initialAmount`	String	The starting amount in the account associated with this goal.	Required for create, not editable for update	59.0
`name`	String	A name for the goal.	Required for create, optional for update	59.0
`priority`	String	The priority of this goal.	Required for create, optional for update	59.0
`startDate`	String	The creation date of this goal.	Required for create, not editable for update	59.0
`status`	String	The status of this goal's progress.	Required for create, optional for update	59.0
`targetAmount`	String	The amount this goal is intended to raise.	Required for create, optional for update	59.0
`targetDate`	String	The date at which this goal is intended to reach the `targetAmount`.	Required for create, optional for update	59.0
`type`	String	The goal type, for example `Auto` or `Retirement`.	Required for create, optional for update	59.0

Financial Goal List Create Input

Input for creating multiple financial goals with goal members.

JSON example

In this example, `carType` and `role` are custom fields.

```
{
  "financialGoals": [
    {
      "financialGoal": {
        "actualAmount": "$1000.00",
        "completionDate": "2024-05-01",
        "initialAmount": "$500.00",
        "description": "Car for commuting",
        "priority": "P1",
        "startDate": "2023-05-01",
        "status": "InProgress",
        "targetAmount": "$50000.00",
        "targetDate": "2024-05-01",
        "name": "Goal1",
        "type": "Auto",
        "customFields": {
          "carType": "New luxury car"
        }
```

```
      },
      "financialGoalParties": [
        {
          "accountId": "001xx000003GYyJAAW",
          "customFields": {
            "role": "Auto purchaser"
          }
        },
        {
          "accountId": "001xx000005dJCxYAM",
          "customFields": {
            "role": "Auto purchaser partner"
          }
        }
      ]
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`financialGoals`	Financial Goal Create Input[]	List of goals and goal members to be created.	Required	59.0

Financial Goal Party Input

Input for adding or removing financial goal members.

JSON example

In this example, `role` is a custom field.

```
{
  "accountId": "001xx000003GYyJAAW",
  "customFields": {
    "role": "Auto purchaser"
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`accountId`	String	ID of a Person Account that represents a goal member.	At least one required	59.0
`customFields`	Map<String, Object>	Custom fields added for a particular banking institution.	Optional	59.0

Financial Goal Patch Input

Input for updating a financial goal.

JSON example

In this example, `carType`, `role`, and `FSC9__FinancialAccount__c` are custom fields.

```
{
  "financialGoal": {
    "completionDate": "2024-06-01",
    "description": "Cars for commuting",
    "targetAmount": "$55000.00",
    "targetDate": "2024-06-01",
    "customFields": {
      "carType": "New luxury car and used car"
    }
  },
  "addFinancialGoalParties": [
    {
      "accountId": "001xx000003GYyJAAV",
      "customFields": {
        "role": "Auto purchaser daughter"
      }
    }
  ],
  "addFinancialGoalFundings": [
    {
      "amount": 2000,
      "currencyIsoCode": "USD",
      "customFields": {
        "FSC9__FinancialAccount__c": "a0HSG0000000AfJ2AV"
      }
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`addFinancialGoalFundings`	Financial Goal Funding Input[]	Financial Accounts to be added to the Financial Goal.	Optional	60.0
`addFinancialGoalParties`	Financial Goal Party Input[]	Goal members to be added to the Financial Goal.	Optional	59.0
`financialGoal`	Financial Goal Input	Financial Goal data.	Required for 59.0, Optional for 60.0	59.0
`removeFinancialGoalFundings`	Financial Goal Funding Input[]	Financial Accounts to be removed from the Financial Goal.	Optional	60.0
`removeFinancialGoalParties`	Financial Goal Party Input[]	Goal members to be removed from the Financial Goal.	Optional	59.0

Financial Goal Query Input

Query input for financial goals and goal members based on a parent record ID. The parent can be a Person Account or Household.

JSON example

```
{
  "financialGoalFields": [
    "Name",
    "Description",
    "ActualAmount",
    "CompletionDate"
  ],
  "financialGoalPartyFields": [
    "AccountId",
    "Account.Name"
  ],
  "filterCriteria": [
    {
      "fieldName": "FinancialGoal.Type",
      "operator": "equals",
      "value": "Retirement"
    }
  ],
  "offset": 1,
  "limit": 10,
  "sortBy": "DESC",
  "orderBy": "FinancialGoal.Name"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`filterCriteria`	Filter Criteria[]	Filter criteria for the results.	Optional	59.0
`financialGoalFields`	String[]	List of developer names of the fields from the FinancialGoal object to be retrieved.	Required for 59.0, Optional for 60.0	59.0
`financialGoalFundingFields`	String[]	List of field developer names from the FinancialAccount object to be retrieved.	Optional	60.0
`financialGoalPartyFields`	String[]	List of field developer names from the FinancialGoalParty object to be retrieved.	Optional	59.0
`limit`	Integer	Maximum number of financial goals returned in each response.	Optional	59.0
`offset`	Integer	Offset for paging through returned financial goals.	Optional	59.0
`orderBy`	String	Fully qualified developer name of the field used to sort the results.	Optional	59.0

Name	Type	Description	Required or Optional	Available Version

`sortBy`	String	Sort the results by
		`Asc`
		or
		`Desc`
		order.
			Optional	59.0

Financial Input

Input details for the financial transaction.

Root XML tag

`<financials>`

JSON example

```
{
  "financials": [
    {
      "borrowerClosingCostAmt": 95956,
      "counselingAgencyProviderName": "Test provider",
      "counselingCompleteBorrName": "BR1",
      "counselingCompletionDate": "2019-10-31T19:00:00.000Z",
      "creditFromSeller": 33342,
      "discountPointCostAmount": 59586,
      "estFirstMortgagePayment": 459677,
      "estHomeownerInsurancePayment": 35521,
      "estMortgageInsurancePayment": 2424555,
      "estOtherDuesPayment": 24354,
      "estOtherPayment": 323231,
      "estPropertyTaxesPayment": 422556,
      "estSubordinateLienPayment": 35453,
      "estSuppPropInsurancePayment": 44959,
      "extendedFields": [],
      "externalId": "af7e7c76-33ac-4005-b377-4b4663a49ec9",
      "financeMortgageInsuranceAmt": 353,
      "hasCompletedCounseling": true,
      "hasHomeownerEducation": true,
      "homeEdCompletedBorrowerName": "BR1",
      "homeownerEdCompleteDate": "2019-10-24T19:00:00.000Z",
      "homeownerEdFormat": "Attended Workshop in Person",
      "housingCounselingFormat": "Face-to-Face",
      "hudApproveAgencyId": "12344",
      "hudApprovedProviderId": "3532",
      "landAcquiredSeparatelyAmount": 2040,
      "loanAmtExclFinMortgageInsurance": 33345,
      "name": "Fin1",
      "otherCredit": 2242,
      "otherNewMortgageLoanAmt": 253535,
```

```
      "outstandingLoanAmount": 24505056,
      "purchasePriceAmount": 150000,
      "remodelAndRepairsAmount": 3040
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
borrowerClosingCostAmt	Double	Total closing costs due from borrower, including prepaid and initial escrow payments.	Optional	48.0
counselingAgencyName	String	Counseling provider's name if agency isn't HUD approved or if Housing Counseling Agency ID is unknown.	Optional	48.0
counselingAgencyProviderName	String	Education provider's name if agency isn't HUD-approved or if Housing Counseling Agency ID is unknown.	Optional	48.0
counselingCompleteBorrName	String	Name of borrower or borrowers who completed housing counseling.	Optional	48.0
counselingCompletionDate	String	Date borrower completed housing counseling.	Optional	48.0
creditFromSeller	Double	Total amount of closing costs due from seller.	Optional	48.0
discountPointCostAmount	Double	Total cost of discount points purchased by the borrower due at closing.	Optional	48.0
estFirstMortgagePayment	Double	Proposed monthly first mortgage payment for loan application property, including principal and interest.	Optional	48.0
estHomeownerInsurancePayment	Double	Proposed monthly payment for homeowners insurance on application property.	Optional	48.0
estMortgageInsurancePayment	Double	Proposed monthly mortgage insurance payment on application property.	Optional	48.0
estOtherDuesPayment	Double	Proposed total monthly payment on application property for payments like homeowners association, co-op, condo, or planned unit development dues.	Optional	48.0
estOtherPayment	Double	Proposed total monthly payment for other housing expenses on application property.	Optional	48.0

Name	Type	Description	Required or Optional	Available Version
estPropertyTaxesPayment	Double	Proposed monthly payment for real estate taxes on application property.	Optional	48.0
estSubordinateLienPayment	Double	Proposed total monthly payment for other mortgages or liens on loan application property, including principal and interest.	Optional	48.0
estSuppPropInsurancePayment	Double	Proposed monthly payment for supplemental property insurance like flood, earthquake, or umbrella policies on application property.	Optional	48.0
extendedFields	Extended Fields Input[]	Custom fields related to the transaction.	Optional	48.0
externalId	String	Identifier assigned to imported financial data by external data source (if applicable).	Optional	48.0
financeMortgageInsuranceAmt	Double	Total amount of financed mortgage insurance or financed mortgage insurance equivalent.	Optional	48.0
hasCompletedCounseling	Boolean	Indicates whether one or more borrowers completed housing counseling within the last 12 months.	Optional	48.0
hasHomeownerEducation	Boolean	Indicates whether one or more borrowers completed homeownership education within the last 12 months.	Optional	48.0
homeEdCompletedBorrowerName	String	Name of borrower or borrowers who completed homeownership education.	Optional	48.0
homeownerEdCompleteDate	String	Date borrower completed homeownership education.	Optional	48.0
homeownerEdFormat	String	Indicates the format of homeownership education attended by borrower.	Optional	48.0
housingCounselingFormat	String	Indicates the format of the housing counseling completed by borrower.	Optional	48.0
hudApproveAgencyId	String	Home counseling provider's Housing Counseling Agency ID if agency is HUD-approved.	Optional	48.0
hudApprovedProviderId	String	Homeownership education provider's Housing Counseling Agency ID if agency is HUD-approved.	Optional	48.0
id	String	ID of the loan application financial.	Optional	48.0

Name	Type	Description	Required or Optional	Available Version
landAcquiredSeparatelyAmount	Double	Price of land if purchased separately from the building or structure.	Optional	48.0
loanAmtExclFinMortgageIns	Double	Loan amount excluding financed mortgage insurance or financed mortgage insurance equivalent.	Optional	48.0
name	String	Name of the loan application financial.	Optional	48.0
otherCredit	Double	Total amount of all purchase credits like borrower credits, credits from third parties, and non-cash seller credits.	Optional	48.0
otherNewMortgageLoanAmt	Double	Total amount of other new borrower mortgages, both first lien and subordinate lien, on the application property.	Optional	48.0
outstandingLoanAmount	Double	Total amount of all mortgage loans on application property to be paid off by refinance loan.	Optional	48.0
purchasePriceAmount	Double	Purchase price for the property.	Optional	48.0
remodelAndRepairsAmount	Double	Cost of any alterations, improvements, and repairs on the property.	Optional	48.0

Generic Object Wrapper

Input representation of additional details of the case, case participant, or complaint.

Properties

Name	Type	Description	Required or Optional	Available Version
value	Object	Additional details of the case, case participant, or complaint.	Optional	58.0

Liability Input

Details about the borrower and co-borrower current liabilities.

Root XML tag

```
<liabilities>
```

JSON example

```
{
  "liabilities": [
    {
      "accountNumber": "134234242",
```

```
      "accountType": "Revolving",
      "borrowersExternalIds": [
        "0fc5e4d6-de5d-4954-9d21-3c628ad8809a",
        "732c3d7e-78ae-4b5e-944d-f411fb4011d4"
      ],
      "creditLimitAmount": 34353,
      "creditorName": "BOFA",
      "extendedFields": [],
      "externalId": "df126729-19c0-4dc9-80c6-322bc6fb994c",
      "isJointLiability": true,
      "liabilityClass": "Financial",
      "loanType": "Conventional",
      "monthlyPaymentAmount": 35353,
      "name": "Liab1",
      "otherLiabilityType": "Child Support",
      "shouldBePaidInFull": true,
      "unpaidBalanceAmount": 242
    },
    {
      "accountNumber": "464634123",
      "accountType": "Revolving",
      "borrowersExternalIds": [
        "0fc5e4d6-de5d-4954-9d21-3c628ad8809a",
        "732c3d7e-78ae-4b5e-944d-f411fb4011d4"
      ],
      "creditLimitAmount": 423465356,
      "creditorName": "CHase",
      "extendedFields": [],
      "externalId": "194bcc9c-7b86-4a49-9d17-fad0e4d205a3",
      "isJointLiability": true,
      "liabilityClass": "Financial",
      "loanType": "Conventional",
      "monthlyPaymentAmount": 2423535,
      "name": "Liab2",
      "otherLiabilityType": "Alimony",
      "shouldBePaidInFull": true,
      "unpaidBalanceAmount": 553
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`accountNumber`	String	Borrower's account number with lender or creditor.	Optional	48.0
`accountType`	String	Personal debt borrower owes like credit card balances, other debts, and leases.	Optional	48.0
`assetExternalId`	String	Identifier assigned to imported asset data by external data source (if applicable).	Optional	48.0

Name	Type	Description	Required or Optional	Available Version
assetId	String	ID of the asset.	Optional	48.0
borrowersExternalIds	String[]	Identifier assigned to imported borrowers data by external data source (if applicable).	Optional	48.0
borrowersIds	String[]	IDs of the borrowers.	Optional	48.0
creditLimitAmount	Double	Credit limit of real estate loan or line of credit.	Optional	48.0
creditorName	String	Lender or creditor owed the debt.	Optional	48.0
extendedFields	Extended Fields Input[]	Custom fields related to the asset.	Optional	48.0
externalId	String	Identifier assigned to imported liability data by external data source (if applicable).	Optional	48.0
id	String	ID of the liability.	Optional	48.0
isJointLiability	Boolean	Indicates whether borrower holds liability jointly.	Optional	48.0
liabilityClass	String	Include the liability's monthly payment in this liability class monthly payment total.	Optional	48.0
loanType	String	Existing real estate loan type.	Optional	48.0
monthlyPaymentAmount	Double	Borrower's monthly payment required to keep debt account current.	Optional	48.0
name	String	Name of the liability.	Optional	48.0
otherLiabilityType	String	Identifies type of other borrower expense or liability.	Optional	48.0
shouldBePaidInFull	Boolean	Indicates whether borrower to pay off debt on or before closing.	Optional	48.0
unpaidBalanceAmount	Double	Unpaid liability balance when borrower completed loan application.	Optional	48.0

Mapper Input Representation

Represents the input representation for the Mapper POST method.

JSON example

```
{
  "recordId": "0cdB0000000CbVGIA0"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`recordId`	String	ID of the residential loan application.	Required	49.0

Mortgage Input

Represents the input for mortgage POST or PATCH method.

JSON example

```
{
  "accountId": "001RM000004XraFYAS",
  "amortizationTerm": 30,
  "amortizationType": "Adjustable Rate",
  "assets": [
    {
      "accountNumber": "849393",
      "accountType": "Checking",
      "assetClass": "Financial",
      "assetType": "Earnest Money",
      "borrowersExternalIds": [
        "0fc5e4d6-de5d-4954-9d21-3c628ad8809a",
        "732c3d7e-78ae-4b5e-944d-f411fb4011d4"
      ],
      "cashOrMarketValue": 434934903,
      "dispositionType": "Pending Sale",
      "extendedFields": [],
      "externalId": "df126729-19c0-4dc9-80c6-322bc6fb994c",
      "financialInstitutionName": "BOFA",
      "grossMonthlyRentalIncome": 355395355,
      "name": "Asset1",
      "netMonthlyRentalIncome": 2535345,
      "presentMarketValue": 7937399,
      "realEstateAddress": {
        "city": "San Francisco",
        "country": "CA",
        "street": "234 1st Street"
      },
      "realEstateMonthlyExpense": 3413131
    },
    {
      "accountNumber": "2424242424",
      "accountType": "Checking",
      "assetClass": "Real Estate",
      "assetType": "Earnest Money",
      "borrowersExternalIds": [
        "0fc5e4d6-de5d-4954-9d21-3c628ad8809a",
        "732c3d7e-78ae-4b5e-944d-f411fb4011d4"
      ],
      "cashOrMarketValue": 24424525,
      "dispositionType": "Sold",
```

```
    "extendedFields": [],
    "externalId": "a57f5b81-477b-41a3-a647-5852562913e5",
    "financialInstitutionName": "wells",
    "grossMonthlyRentalIncome": 24242224,
    "name": "Asset2",
    "netMonthlyRentalIncome": 242424234,
    "presentMarketValue": 2423131313,
    "realEstateAddress": {
      "city": "San Francisco",
      "country": "CA",
      "street": "123 2nd Street"
    },
    "realEstateMonthlyExpense": 2242423424
  }
],
"balloonTermMonths": 3,
"borrowers": [
  {
    "addresses": [
      {
        "addressOwnership": "Own",
        "extendedFields": [],
        "externalId": "e8d51e2a-7d97-4da0-8356-ca86995d3d39",
        "monthlyRentPayment": 2300,
        "name": "Addr1",
        "residenceAdditionalMonthCount": 23,
        "residenceAddress": {
          "city": "San Francisco",
          "country": "United States",
          "postalCode": "94105",
          "state": "CA",
          "street": "50 Fremont Street"
        },
        "residenceYearCount": 3,
        "residencyType": "Former Residence"
      }
    ],
    "asianRaceSubType": "Asian Indian",
    "borrowerType": "Borrower",
    "citizenshipStatus": "U.S. Citizen",
    "declarations": [
      {
        "bankruptcyType": "Chapter 11",
        "borrowedAmount": 20000,
        "extendedFields": [],
        "externalId": "be71c372-8290-44dc-bb73-6f6d1ce7e9a9",
        "hasBorrowedMoney": true,
        "hasCoSignerUndisclosedDebt": true,
        "hasDeclaredBankruptcy": true,
        "hasDeedSurrender": true,
        "hasOutstandingJudgement": true,
        "hasOwnershipInterest": true,
        "hasPastShortSale": true,
        "hasPropertyForeclosed": true,
```

```
      "hasUndisclosedAddCreditApp": true,
      "hasUndisclosedOtherPropLoan": true,
      "isPartyToLawsuit": true,
      "isPresentlyDelinquent": true,
      "isPrimaryResidence": true,
      "isRelatedToSeller": true,
      "name": "Decl1",
      "priorPropertyTitleType": "Yourself",
      "priorPropertyUsageType": "Secondary Residence"
    }
  ],
  "dependentCount": 2,
  "dependentsAge": "25,34",
  "employments": [
    {
      "currentJobAdditionalMonthCount": 24,
      "currentJobYearCount": 4,
      "employerAddress": {
        "city": "Fresno",
        "country": "United States",
        "postalCode": "93721",
        "state": "CA",
        "street": "1500 Divisadero Street"
      },
      "extendedFields": [],
      "externalId": "2a9460d0-3194-449a-8bf0-488a6cbaed0a",
      "isRelToTransactionParty": true,
      "isLessThanQuarterShare": true,
      "isSelfEmployed": true,
      "jobTitle": "developer",
      "monthlyBaseIncomeAmount": 2300,
      "monthlyBonusAmount": 100,
      "monthlyCommissionAmount": 10,
      "monthlyIncome": 5000,
      "monthlyMilitaryEntitlementAmt": 20,
      "monthlyOtherIncomeAmount": 10,
      "monthlyOvertimeAmount": 200,
      "name": "Empl1",
      "startDate": "2019-10-10T03:11:27.000Z"
    }
  ],
  "ethnicitySubType": "Mexican",
  "ethnicityType": "Not Hispanic or Latino",
  "extendedFields": [],
  "externalId": "0fc5e4d6-de5d-4954-9d21-3c628ad8809a",
  "genderType": "Female",
  "hasMilitaryService": true,
  "incomes": [
    {
      "extendedFields": [],
      "externalId": "b19d9372-df99-4eec-9de0-ad785503992d",
      "incomeSourceType": "Capital Gains",
      "monthlyIncomeAmount": 100,
      "name": "Income1"
```

```
      }
    ],
    "isActiveMilitary": true,
    "isJointCredit": true,
    "isSurvivingMilitarySpouse": true,
    "maritalStatus": "Married",
    "militaryTourExpirationMonth": 2,
    "militaryTourExpirationYear": 2027,
    "name": "BR1",
    "otherAsianRaceSubType": "Indian",
    "otherEthnicitySubType": "Mexico",
    "otherPacIslandSubType": "Test Pacific Islander",
    "pacificIslanderSubType": "Native Hawaiian",
    "preferredLanguage": "English",
    "raceType": "Asian",
    "tribeName": "Pacific Islander",
    "wasActiveMilitary": true,
    "wasNonActivatedService": true
  },
  {
    "addresses": [
      {
        "addressOwnership": "Rent",
        "extendedFields": [],
        "externalId": "86c168dd-a29c-4c0b-b366-51a40cd66c4b",
        "monthlyRentPayment": 5000,
        "name": "Addr2",
        "residenceAdditionalMonthCount": 24,
        "residenceAddress": {
          "city": "San Francisco",
          "country": "United States",
          "postalCode": "94115",
          "state": "CA",
          "street": "1500 Divisadero Street"
        },
        "residenceYearCount": 3,
        "residencyType": "Present Address"
      }
    ],
    "asianRaceSubType": "Asian Indian",
    "borrowerType": "CoBorrower",
    "citizenshipStatus": "U.S. Citizen",
    "declarations": [
      {
        "bankruptcyType": "Chapter 12",
        "borrowedAmount": 657575,
        "extendedFields": [],
        "externalId": "704e7cfd-932c-4a17-81ad-844fe1a007c6",
        "hasBorrowedMoney": true,
        "hasCoSignerUndisclosedDebt": true,
        "hasDeclaredBankruptcy": true,
        "hasDeedSurrender": true,
        "hasOutstandingJudgement": true,
        "hasOwnershipInterest": true,
```

```
      "hasPastShortSale": true,
      "hasPropertyForeclosed": true,
      "hasUndisclosedAddCreditApp": true,
      "hasUndisclosedOtherPropLoan": true,
      "isPartyToLawsuit": true,
      "isPresentlyDelinquent": true,
      "isPrimaryResidence": true,
      "isRelatedToSeller": true,
      "name": "Decl1",
      "priorPropertyTitleType": "Yourself",
      "priorPropertyUsageType": "Primary Residence"
    }
  ],
  "dependentCount": 2,
  "dependentsAge": "34,35",
  "employments": [
    {
      "currentJobAdditionalMonthCount": 24,
      "currentJobYearCount": 3,
      "employerAddress": {
        "city": "Fresno",
        "country": "United States",
        "postalCode": "93721",
        "state": "CA",
        "street": "2300 Stockton Street"
      },
      "extendedFields": [],
      "externalId": "34380cb7-95ca-4867-9a74-972af1be22db",
      "isRelToTransactionParty": true,
      "isLessThanQuarterShare": true,
      "isSelfEmployed": true,
      "jobTitle": "developer",
      "monthlyBaseIncomeAmount": 2400,
      "monthlyBonusAmount": 234,
      "monthlyCommissionAmount": 10,
      "monthlyIncome": 45668,
      "monthlyMilitaryEntitlementAmt": 20,
      "monthlyOtherIncomeAmount": 394,
      "monthlyOvertimeAmount": 123,
      "name": "Empl2",
      "startDate": "2019-10-10T03:11:27.000Z"
    }
  ],
  "ethnicitySubType": "Mexican",
  "ethnicityType": "Hispanic or Latino",
  "extendedFields": [],
  "externalId": "732c3d7e-78ae-4b5e-944d-f411fb4011d4",
  "genderType": "Female",
  "hasMilitaryService": true,
  "incomes": [
    {
      "extendedFields": [],
      "externalId": "91027067-09d3-45f2-a0fc-217ce1f63458",
      "incomeSourceType": "Child Support",
```

```
          "monthlyIncomeAmount": 200,
          "name": "Income1"
        }
      ],
      "isActiveMilitary": true,
      "isJointCredit": true,
      "isSurvivingMilitarySpouse": true,
      "maritalStatus": "Married",
      "militaryTourExpirationMonth": 3,
      "militaryTourExpirationYear": 2029,
      "name": "COB1",
      "otherAsianRaceSubType": "South india",
      "otherEthnicitySubType": "Mexico",
      "otherPacIslandSubType": "Test pacific Islander",
      "pacificIslanderSubType": "Guamanian or Chamorro",
      "preferredLanguage": "English",
      "raceType": "American Indian or Alaska Native",
      "tribeName": "Pacific Islander",
      "wasActiveMilitary": true,
      "wasNonActivatedService": true
    }
  ],
  "estateHoldType": "Fee Simple",
  "extendedFields": [],
  "externalId": "0c4a3933-47d3-43d5-a2e6-09ae10e11a5e",
  "financials": [
    {
      "borrowerClosingCostAmt": 95956,
      "counselingAgencyProviderName": "Test provider",
      "counselingCompleteBorrName": "BR1",
      "counselingCompletionDate": "2019-10-31T19:00:00.000Z",
      "creditFromSeller": 33342,
      "discountPointCostAmount": 59586,
      "estFirstMortgagePayment": 459677,
      "estHomeownerInsurancePayment": 35521,
      "estMortgageInsurancePayment": 2424555,
      "estOtherDuesPayment": 24354,
      "estOtherPayment": 323231,
      "estPropertyTaxesPayment": 422556,
      "estSubordinateLienPayment": 35453,
      "estSuppPropInsurancePayment": 44959,
      "extendedFields": [],
      "externalId": "af7e7c76-33ac-4005-b377-4b4663a49ec9",
      "financeMortgageInsuranceAmt": 353,
      "hasCompletedCounseling": true,
      "hasHomeownerEducation": true,
      "homeEdCompletedBorrowerName": "BR1",
      "homeownerEdCompleteDate": "2019-10-24T19:00:00.000Z",
      "homeownerEdFormat": "Attended Workshop in Person",
      "housingCounselingFormat": "Face-to-Face",
      "hudApproveAgencyId": "12344",
      "hudApprovedProviderId": "3532",
      "landAcquiredSeparatelyAmount": 2040,
      "loanAmtExclFinMortgageInsurance": 33345,
```

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      "name": "Fin1",
      "otherCredit": 2242,
      "otherNewMortgageLoanAmt": 253535,
      "outstandingLoanAmount": 24505056,
      "purchasePriceAmount": 150000,
      "remodelAndRepairsAmount": 3040
    }
  ],
  "hasOtherLoanFeature": true,
  "hasPrepaymentPenalty": true,
  "improvementCost": 100,
  "initialBuydownRate": 401,
  "interestOnlyMonthCount": 4,
  "interestRate": 4,
  "isBalloon": true,
  "isBorrowerInCommunityPropState": true,
  "isConstructionToPermanent": true,
  "isContractForDeed": true,
  "isEnergyRelatedImprovement": true,
  "isInterestOnly": true,
  "isNegativeAmortization": true,
  "isPropInCommunityPropState": true,
  "isRenovation": true,
  "isSingleClosing": true,
  "isSubjectToPriorityLien": true,
  "isTempIntRateBuydown": true,
  "leaseHoldExpirationDate": "2019-10-31T19:00:00.000Z",
  "liabilities": [
    {
      "accountNumber": "134234242",
      "accountType": "Revolving",
      "borrowersExternalIds": [
        "0fc5e4d6-de5d-4954-9d21-3c628ad8809a",
        "732c3d7e-78ae-4b5e-944d-f411fb4011d4"
      ],
      "creditLimitAmount": 34353,
      "creditorName": "BOFA",
      "extendedFields": [],
      "externalId": "df126729-19c0-4dc9-80c6-322bc6fb994c",
      "isJointLiability": true,
      "liabilityClass": "Financial",
      "loanType": "Conventional",
      "monthlyPaymentAmount": 35353,
      "name": "Liab1",
      "otherLiabilityType": "Child Support",
      "shouldBePaidInFull": true,
      "unpaidBalanceAmount": 242
    },
    {
      "accountNumber": "464634123",
      "accountType": "Revolving",
      "borrowersExternalIds": [
        "0fc5e4d6-de5d-4954-9d21-3c628ad8809a",
        "732c3d7e-78ae-4b5e-944d-f411fb4011d4"
```

```
      ],
      "creditLimitAmount": 423465356,
      "creditorName": "CHase",
      "extendedFields": [],
      "externalId": "194bcc9c-7b86-4a49-9d17-fad0e4d205a3",
      "isJointLiability": true,
      "liabilityClass": "Financial",
      "loanType": "Conventional",
      "monthlyPaymentAmount": 2423535,
      "name": "Liab2",
      "otherLiabilityType": "Alimony",
      "shouldBePaidInFull": true,
      "unpaidBalanceAmount": 553
    }
  ],
  "loanPurpose": "Purchase",
  "lotAcquiredDate": "2019-10-31T19:00:00.000Z",
  "lotOriginalCost": 200.3,
  "monthsBeforeFirstAdj": 2,
  "monthsBetweenAdjustments": 3,
  "mortgageLienType": "First Lien",
  "mortgageProgramType": "Conventional",
  "name": "Loan1",
  "nativeLandTenure": "Fee Simple (On a Reservation)",
  "otherAmortizationType": "Test Amortization type",
  "otherLoanFeature": "Test Loan Feature",
  "otherLoanPurpose": "Test Loan Purpose",
  "otherMortgageProgramType": "Test program",
  "otherRefinanceProgType": "Test Refinance",
  "prepayPenaltyTermMonth": 5,
  "projectType": "Cooperative",
  "properties": [
    {
      "esMonthlyRentalIncome": 400506,
      "esNetMonthlyRentalIncome": 304056,
      "extendedFields": [],
      "externalId": "a57f5b81-477b-41a3-a647-5852562913e5",
      "isManufacturedHome": true,
      "isMixedUseProperty": true,
      "loanPurposeType": "Purchase",
      "name": "Prop1",
      "propertyUseType": "Primary Residence",
      "propertyValue": 50500555,
      "requestedLoanAmount": 5005000,
      "unitsFinancedCount": 5
    }
  ],
  "refinanceProgramType": "Full Documentation",
  "refinanceType": "No Cash Out",
  "status": "New",
  "titleHolders": [
    {
      "extendedFields": [],
      "externalId": "e8d51e2a-7d97-4da0-8356-ca86995d3d39",
```

```
      "isCurrentTitleHolder": true,
      "name": "T1",
      "titleHolderName": "Times"
    }
  ],
  "titleType": "Joint Tenancy with Right of Survivorship",
  "trustTitleType": "Title Will be Held by an Inter Vivos (Living) Trust"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`accountId`	String	Account associated with the application.	Required if `opportunityId` isn't provided	48.0
`amortizationTerm`	Integer	Duration of the amortization in months.	Optional	48.0
`amortizationType`	String	Amortization type for loan.	Optional	48.0
`assets`	Asset Input[]	Represents details about the borrower's and co-borrower's current personal and real property.	Optional	48.0
`balloonTermMonths`	Integer	Number of months during which the cumulative loan must be repaid.	Optional	48.0
`borrowers`	Borrower Input[]	List of borrowers for a loan application.	Optional	48.0
`estateHoldType`	String	Lender's lien is on both land and structure (fee simple) or just structure (leasehold).	Optional	48.0
`extendedFields`	Extended Fields Input[]	Represents custom fields related to a loan application.	Optional	48.0
`externalId`	String	Identifier assigned to imported data by external data source (if applicable).	Optional	48.0
`financials`	Financial Input[]	Represents transaction details for a loan application.	Optional	48.0
`hasOtherLoanFeature`	Boolean	Indicates whether loan has other amortization feature.	Optional	48.0
`hasPrepaymentPenalty`	Boolean	Indicates whether penalty is incurred if borrower pays off loan balance before the loan term expires.	Optional	48.0
`improvementCost`	Double	Construction costs for a construction loan or home improvement costs for a renovation loan.	Optional	48.0
`initialBuydownRate`	Double	Initial lesser interest rate for the loan.	Optional	48.0

Name	Type	Description	Required or Optional	Available Version
interestOnlyMonthCount	Integer	Number of months that loan payments are interest only.	Optional	48.0
interestRate	Double	Interest rate for loan.	Optional	48.0
isBalloon	Boolean	Indicates whether borrower is applying for a balloon payment mortgage.	Optional	48.0
isBorrowerCommunityPropState	Boolean	Indicates whether borrower lives in community property state.	Optional	48.0
isConstructionToPermanent	Boolean	Indicates whether at least one borrower lives in a community property state.	Optional	48.0
isContractForDeed	Boolean	Indicates whether loan proceeds are to pay off balance due on a contract for deed or land contract.	Optional	48.0
isEnergyRelatedImprovement	Boolean	Indicates whether loan is to finance energy-related improvements.	Optional	48.0
isInterestOnly	Boolean	Indicates whether borrower is applying for an interest-only mortgage.	Optional	48.0
isNegativeAmortization	Boolean	Indicates whether loan allows for negative amortization where shortfalls in interest payments are added to the outstanding loan balance.	Optional	48.0
isPropCommunityPropState	Boolean	Indicates whether property is located in a community property state.	Optional	48.0
isRenovation	Boolean	Indicates whether loan proceeds to finance cost of renovations to the property, and renovation value is included in the property's appraised value.	Optional	48.0
isSingleClosing	Boolean	Indicates whether construction and permanent loans have a single combined closing. Once construction is complete, loan converts to a traditional mortgage.	Optional	48.0
isSubjectToPriorityLien	Boolean	Indicates whether property is currently subject to an energy-related lien that could take priority over the first mortgage lien.	Optional	48.0
isTempIntRateBuydown	Boolean	Indicates whether borrower is applying for loan with an initially reduced interest payment in exchange for an up-front cash deposit.	Optional	48.0

Name	Type	Description	Required or Optional	Available Version
leaseHoldExpirationDate	String	Date when leasehold expires if land is leased.	Optional	48.0
liabilities	Liability Input[]	Represents details about the borrower and co-borrower current liabilities.	Optional	48.0
loanPurpose	String	Purpose of the loan.	Optional	48.0
lotAcquiredDate	String	Month and year property or land was purchased.	Optional	48.0
lotOriginalCost	Double	Original property cost (refinance) or original land cost (construction).	Optional	48.0
monthsBeforeFirstAdj	Integer	Initial period prior to first adjustment in months.	Optional	48.0
monthsBetweenAdjustments	Integer	Number of months before the first rate adjustment for an adjustable rate loan.	Optional	48.0
mortgageLienType	String	Type of mortgage lien associated with this loan application.	Optional	48.0
mortgageProgramType	String	Type of mortgage program applied for.	Optional	48.0
name	String	Name of the residential loan application.	Required	48.0
nativeLandTenure	String	Property is located on an area reserved by or for an Indian land, village, or tribe to live on and use.	Optional	48.0
opportunityId	String	Opportunity associated with the application.	Required if `accountId` isn't provided	48.0
otherAmortizationType	String	Description of other amortization type for government loans.	Optional	48.0
otherLoanFeature	String	Description of other loan amortization feature.	Optional	48.0
otherLoanPurpose	String	What the borrower will use the loan for if other was specified.	Optional	48.0
otherMortgageProgramType	String	Description of the other mortgage type.	Optional	48.0
otherRefinanceProgType	String	Refinance program name if other was specified.	Optional	48.0
prepayPenaltyTermMonth	Integer	Number of months during which borrower incurs a penalty for early payoff of the loan balance.	Optional	48.0

Name	Type	Description	Required or Optional	Available Version
projectType	String	Specifies the type of project that the property belongs to.	Optional	48.0
properties	Property Input[]	Represents details of the property the loan application finances.	Optional	48.0
refinanceProgramType	String	The applicable refinance program type based on the investor, guarantor, or lender guidelines.	Optional	48.0
refinanceType	String	Refinance loan type.	Optional	48.0
status	String	Indicates the current status of the loan application.	Optional	48.0
titleHolders	Title Holder Input[]	Represents details of borrowers who are applying to hold title to the property the loan application finances.	Optional	48.0
titleType	String	Way the borrower or borrowers take title for the loan.	Optional	48.0
trustTitleType	String	Title to be held in a living trust or a land trust.	Optional	48.0

Property Input

Represents details of the property the loan application finances.

Root XML tag

```
<properties>
```

JSON example

```
{
  "properties": [
    {
      "esMonthlyRentalIncome": 400506,
      "esNetMonthlyRentalIncome": 304056,
      "extendedFields": [],
      "externalId": "a57f5b81-477b-41a3-a647-5852562913e5",
      "isManufacturedHome": true,
      "isMixedUseProperty": true,
      "loanPurposeType": "Purchase",
      "name": "Prop1",
      "propertyUseType": "Primary Residence",
      "propertyValue": 50500555,
      "requestedLoanAmount": 5005000,
      "unitsFinancedCount": 5
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
esMonthlyRentalIncome	Double	Estimated gross monthly rental income per unit if application property is a two to four unit primary residence or investment property.	Optional	48.0
esNetMonthlyRentalIncome	Double	Estimated net monthly rental income per unit if application property is a two-to-four unit primary residence or investment property.	Optional	48.0
extendedFields	Extended Fields Input[]	Custom fields related to the property.	Optional	48.0
externalId	String	Identifier assigned to imported property data by external data source (if applicable).	Optional	48.0
id	String	ID of the property.	Optional	48.0
isManufacturedHome	Boolean	Indicates whether application property is a manufactured home.	Optional	48.0
isMixedUseProperty	Boolean	Indicates whether application property includes commercial space set aside for business use.	Optional	48.0
loanPurposeType	String	What the borrower will use the loan for.	Optional	48.0
name	String	Name of loan application property.	Optional	48.0
propertyAddress	Address Input[]	Physical address of the property to be financed.	Optional	48.0
propertyUseType	String	Borrower's stated use for the property.	Optional	48.0
propertyValue	Double	Estimated present market value of the application property.	Optional	48.0
requestedLoanAmount	Double	Total loan amount the borrower is applying for.	Optional	48.0
unitsFinancedCount	Integer	Number of units being financed at this address.	Optional	48.0

Title Holder Input

Represents details of borrowers who are applying to hold title to the property the loan application finances.

Root XML tag

```
<titleHolders>
```

JSON example

```
{
  "titleHolders": [
    {
      "extendedFields": [],
      "externalId": "e8d51e2a-7d97-4da0-8356-ca86995d3d39",
      "isCurrentTitleHolder": true,
      "name": "T1",
      "titleHolderName": "Times"
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`extendedFields`	Extended Fields Input[]	Custom fields related to the title holder.	Optional	48.0
`externalId`	String	Identifier assigned to imported title holder data by external data source (if applicable).	Optional	48.0
`id`	String	ID of the title holder.	Optional	48.0
`isCurrentTitleHolder`	Boolean	Indicates whether person is a current title holder on property to be refinanced.	Optional	48.0
`name`	String	Name of the loan application title holder.	Optional	48.0
`titleHolderName`	String	Name of the person on the title for the property associated with the loan application.	Optional	48.0

Response Bodies

Here's a list of Financial Services Cloud Business API response bodies.

Address Output
Represents address details.

Asset Output
Represents details about the borrower's and co-borrower's current personal and real property.

Asset Result
Asset result of the POST or PATCH request.

Borrower Address Output
Represents Borrower addresses.

Borrower Address Result
Borrower address result of the POST or PATCH request.

Borrower Declaration Output

Represents financial issues like foreclosure, lawsuits, or defaults of the applicant or co-applicant.

Borrower Declaration Result

Result containing details about borrower's declaration.

Borrower Employment Output

Represents details about the borrower's or co-borrower's current and past employment.

Borrower employment Result

Borrower employment result of the POST or PATCH request.

Borrower Income Output

Represents details about the borrower and co-borrower current monthly income.

Borrower Income Result

Borrower income result of the POST or PATCH request.

Borrower Output

Represents details of the borrower or co-borrower for the loan application.

Borrower Result

Borrower result of the POST or PATCH request.

Complaint Management Output

Output representation of the created public complaint.

Ethoca Alert Callback Output

Ethoca alert callback output for dispute management.

Extended Fields Output

Represents custom fields names and values.

Financial Goal Details Output

Queried financial goal details.

Financial Goal Funding Output

Output for Financial Goal funding.

Financial Goal Party Output

Output for Financial Goal Parties.

Financial Goal Patch Output

Updated financial goal.

Financial Goals Create Output

Container for created financial goals and goal members.

Financial Goals Create Result

Created financial goals and goal members.

Financial Goals List Output

Queried financial goals.

Financial Output

Output details for the financial transaction.

Financial Result

Financial result of the POST or PATCH request.

Liability Output

Details about the borrower and co-borrower current liabilities.

Liability Result

Liability result of the POST or PATCH request.

Mapper Result

Represents the Mapper result.

Mapper Result Representation

Represents the result representation of the POST method.

Mortgage Information Output

Represents the output of the GET method.

Mortgage Information Response

Response for the GET method.

Mortgage Response

Response for the POST or PATCH method.

Mortgage Result

Represents the result of the POST or PATCH method.

Property Result

Property result of the POST or PATCH request.

Property Output

Represents details of the property the loan application finances.

Record Alert

Output representation of the details of a record alert.

Record Alert Collection

Output representation of a collection of record alerts.

Record Alert Collection Map

Output representation of the bulk record alerts request.

Record Alert Action Info

Output representation of the information of the record alert action.

Record Alert Action Info Collection

Output representation of the details of an action on the record alert.

Title Holder Output

Represents details of borrowers who are applying to hold title to the property the loan application finances.

Title Holder Result

Title holder result of the POST or PATCH request.

Retrieval Summary Result

Output representation of a retrieval summary definition call.

Retrieval Summary Result Node

Output representation of the result of a retrieval summary definition call.

Retrieval Summary Result Record

Output representation of a record for the result of a retrieval summary definition call.

Retrieval Summary Result Root Node

Output representation of the result of a retrieval summary definition call.

Address Output

Represents address details.

Property Name	Type	Description	Filter Group and Version	Available Version
`city`	String	The address city.	Small, 48.0	48.0
`country`	String	The address country.	Small, 48.0	48.0
`postalCode`	String	The address postal code.	Small, 48.0	48.0
`state`	String	The address state.	Small, 48.0	48.0
`street`	String	The address street.	Small, 48.0	48.0

Asset Output

Represents details about the borrower's and co-borrower's current personal and real property.

Property Name	Type	Description	Filter Group and Version	Available Version
`accountNumber`	String	Account number associated with financial institution holding asset.	Small, 48.0	48.0
`accountType`	String	Identifies asset account type.	Small, 48.0	48.0
`assetClass`	String	Identifies which asset class total to include the asset's value in.	Small, 48.0	48.0
`assetType`	String	Identifies type of other asset.	Small, 48.0	48.0
`borrowersExternalIds`	String[]	External IDs of borrower and co-borrowers.	Big, 48.0	48.0
`borrowersIds`	String[]	IDs of borrower and co-borrowers.	Big, 48.0	48.0
`cashOrMarketValue`	Double	Asset's cash or current market value.	Small, 48.0	48.0
`createdById`	String	ID of the user who created this record.	Small, 48.0	48.0
`createdDate`	String	Date and time when this record was created.	Small, 48.0	48.0
`dispositionType`	String	Real estate asset's planned future use.	Small, 48.0	48.0
`extendedFields`	Extended Fields Output[]	Custom fields related to the asset.	Big, 48.0	48.0
`externalId`	String	Identifier assigned to imported asset data by external data source (if applicable).	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
financialInstitutionName	String	Name of financial institution where financial account is held.	Small, 48.0	48.0
grossMonthlyRentalIncome	Double	Borrower's monthly rent income collected on real estate asset.	Small, 48.0	48.0
id	String	ID of the asset.	Small, 48.0	48.0
isDeleted	Boolean	Indicates whether the asset record is deleted.	Small, 48.0	48.0
isJointAsset	Boolean	Indicates asset is held jointly.	Small, 48.0	48.0
lastModifiedById	String	ID of the user who last modified this record.	Small, 48.0	48.0
lastModifiedDate	String	Date and time when a user last modified this record.	Small, 48.0	48.0
lastReferencedDate	String	Date and time when a user last referenced this record.	Small, 48.0	48.0
lastViewedDate	String	Date and time when a user last viewed this record.	Small, 48.0	48.0
loanApplicationId	String	ID of the loan application record.	Small, 48.0	48.0
name	String	Name of the loan application asset.	Small, 48.0	48.0
netMonthlyRentalIncome	Double	Borrower's net monthly income on real estate asset.	Small, 48.0	48.0
ownerId	String	ID of the user who owns this record.	Small, 48.0	48.0
presentMarketValue	Double	Cash value of real estate asset if sold today.	Small, 48.0	48.0
realEstateAddress	Address Output[]	Real estate asset's address.	Small, 48.0	48.0
realEstateMonthlyExpense	Double	Borrower's monthly real estate asset expenses including insurance, maintenance, taxes, and miscellaneous costs.	Small, 48.0	48.0
systemModstamp	String	Date and time when a user or automated process (such as a trigger) last modified this record.	Small, 48.0	48.0

Asset Result

Asset result of the POST or PATCH request.

Property Name	Type	Description	Filter Group and Version	Available Version
externalId	String	ID that uniquely identifies imported data in an external data source (if applicable).	Small, 48.0	48.0
id	String	ID of the borrower.	Small, 48.0	48.0

Borrower Address Output

Represents Borrower addresses.

Property Name	Type	Description	Filter Group and Version	Available Version
addressOwnership	String	Identifies borrower's status at residence.	Small, 48.0	48.0
createdById	String	ID of the user who created this record.	Small, 48.0	48.0
createdDate	String	Date and time when this record was created.	Small, 48.0	48.0
extendedFields	Extended Fields Output[]	Custom fields related to the borrower's address.	Big, 48.0	48.0
externalId	String	Identifier assigned to imported borrower's address data by external data source. (if applicable)	Small, 48.0	48.0
id	String	ID of the borrower's address	Small, 48.0	48.0
isDeleted	Boolean	Indicates whether the borrower record is deleted.	Small, 48.0	48.0
lastModifiedById	String	ID of the user who last modified this record.	Small, 48.0	48.0
lastModifiedDate	String	Date and time when a user last modified this record.	Small, 48.0	48.0
lastReferencedDate	String	Date and time when a user last referenced this record.	Small, 48.0	48.0
lastViewedDate	String	Date and time when a user last viewed this record.	Small, 48.0	48.0
loanApplicantId	String	ID of the borrower record.	Small, 48.0	48.0
loanApplicationId	String	ID of the loan application record.	Small, 48.0	48.0
monthlyRentPayment	Double	Borrower's monthly rent payment (if applicable).	Small, 48.0	48.0
name	String	Name of the borrower's address.	Small, 48.0	48.0
residenceAdditionalMonthCount	Integer	Additional months borrower lived at this residence.	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
residenceAddress	Address Output[]	Residence's physical address.	Small, 48.0	48.0
residenceYearCount	Integer	Years borrower lived at this residence.	Small, 48.0	48.0
residencyType	String	Identifies borrower's current residency status.	Small, 48.0	48.0
systemModstamp	String	Date and time when a user or automated process (such as a trigger) last modified this record.	Small, 48.0	48.0

Borrower Address Result

Borrower address result of the POST or PATCH request.

Property Name	Type	Description	Filter Group and Version	Available Version
externalId	String	ID that uniquely identifies imported data in an external data source (if applicable).	Small, 48.0	48.0
id	String	ID of the borrower.	Small, 48.0	48.0

Borrower Declaration Output

Represents financial issues like foreclosure, lawsuits, or defaults of the applicant or co-applicant.

Property Name	Type	Description	Filter Group and Version	Available Version
bankruptcyType	String	Bankruptcy type or types (if applicable).	Small, 48.0	48.0
borrowedAmount	Double	Amount of money borrowed for loan application transaction.	Small, 48.0	48.0
createdById	String	ID of the user who created this record.	Small, 48.0	48.0
createdDate	String	Date and time when this record was created.	Small, 48.0	48.0
extendedFields	Extended Fields Output[]	Custom fields related to the financial transaction.	Big, 48.0	48.0
externalId	String	Identifier assigned to imported declaration data by external data source (if applicable).	Small, 48.0	48.0
hasBorrowedMoney	Boolean	Indicates whether borrower is borrowing money for loan application transaction.	Small, 48.0	48.0
hasCoSignerUndisclosedDebt	Boolean	Indicates whether borrower is co-signer or guarantor on debt or loan that's not disclosed on loan application.	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
hasDeclaredBankruptcy	Boolean	Indicates whether borrower declared bankruptcy within the past seven years.	Small, 48.0	48.0
hasDeedSurrender	Boolean	Indicates whether borrower conveyed title to a property in lieu of foreclosure in past seven years.	Small, 48.0	48.0
hasOutstandingJudgement	Boolean	Indicates whether there are one or more outstanding judgments against the borrower.	Small, 48.0	48.0
hasOwnershipInterest	Boolean	Indicates whether borrower had ownership interest in a property in the last ree years.	Small, 48.0	48.0
hasPastShortSale	Boolean	Indicates whether borrower sold a property to a third party where lender agreed to accept amount less than total outstanding mortgage balance due within past ven years.	Small, 48.0	48.0
hasPropertyForeclosed	Boolean	Indicates whether borrower had property foreclosed upon in last ven years.	Small, 48.0	48.0
hasUndisclosedAddCreditApp	Boolean	Indicates whether, on or before closing, borrower applied for new undisclosed credit like a credit card or installment loan.	Small, 48.0	48.0
hasUndisclosedOtherPropLoan	Boolean	Indicates whether, on or before closing, borrower applied for an undisclosed mortgage loan on a property other than the application property.	Small, 48.0	48.0
id	String	ID of the borrower declaration.	Small, 48.0	48.0
isDeleted	Boolean	Indicates whether the declaration record is deleted.	Small, 48.0	48.0
isPartyToLawsuit	Boolean	Indicates whether borrower is party to lawsuit with potential personal financial liability.	Small, 48.0	48.0
isPresentlyDelinquent	Boolean	Indicates whether borrower is currently delinquent or in default on any federal debt or other loan, mortgage, financial obligation, bond, or loan guarantee.	Small, 48.0	48.0
isPrimaryResidence	Boolean	Indicates whether property is to be borrower's primary residence.	Small, 48.0	48.0
isRelatedToSeller	Boolean	Indicates whether borrower has family or business relationship with seller of property (for purchase transaction).	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
isSubjectToPriorityLien	Boolean	Indicates whether application property is to have a priority clean energy lien like Property Assessed Clean Energy Program financing that takes priority over the first mortgage lien.	Small, 48.0	48.0
lastModifiedById	String	ID of the user who last modified this record.	Small, 48.0	48.0
lastModifiedDate	String	Date and time when a user last modified this record.	Small, 48.0	48.0
lastReferencedDate	String	Date and time when a user last referenced this record.	Small, 48.0	48.0
lastViewedDate	String	Date and time when a user last viewed this record.	Small, 48.0	48.0
loanApplicantId	String	ID of the loan applicant record.	Small, 48.0	48.0
loanApplicationId	String	ID of the loan application record.	Small, 48.0	48.0
name	String	Name of the declaration.	Small, 48.0	48.0
ownerId	String	ID of the user who owns the record.	Small, 48.0	48.0
priorPropertyTitleType	String	Identifies how borrower held title in the ownership interest property.	Small, 48.0	48.0
priorPropertyUsageType	String	Identifies type of property borrower held ownership interest in.	Small, 48.0	48.0
systemModstamp	String	Date and time when a user or automated process (such as a trigger) last modified this record.	Small, 48.0	48.0

Borrower Declaration Result

Result containing details about borrower's declaration.

Property Name	Type	Description	Filter Group and Version	Available Version
externalId	String	Identifier assigned to imported borrower data by external data source (if applicable).	Small, 48.0	48.0
id	String	ID of the borrower.	Small, 48.0	48.0

Borrower Employment Output

Represents details about the borrower's or co-borrower's current and past employment.

Property Name	Type	Description	Filter Group and Version	Available Version
createdById	String	ID of the user who created this record.	Small, 48.0	48.0
createdDate	String	Date and time when this record was created.	Small, 48.0	48.0
currentAdditionalMthCount	Integer	Additional number of months employed at this job (less than 12).	Small, 48.0	48.0
currentJobYearCount	Integer	Number of full years employed at this job.	Small, 48.0	48.0
employerAddress	Address Output[]	Address of borrower's employer or business.	Small, 48.0	48.0
employerName	String	Name of borrower's employer or business.	Small, 48.0	48.0
employerPhone	String	Employer's phone number.	Small, 48.0	48.0
endDate	String	Borrower's last date of employment at this job.	Small, 48.0	48.0
extendedFields	Extended Fields Output[]	Custom fields related to the borrower’s employment.	Big, 48.0	48.0
externalId	String	Identifier assigned to imported employer data by external data source (if applicable).	Small, 48.0	48.0
id	String	ID of the borrower’s employment.	Small, 48.0	48.0
isDeleted	Boolean	Indicates whether the employment record is deleted.	Small, 48.0	48.0
isLessThanQuarterShare	Boolean	Indicates whether borrower owns less than 25% of this business (if applicable).	Small, 48.0	48.0
isRelTransactionParty	Boolean	Indicates whether borrower is employed by a family member, property seller, real estate agent, or other person party to the loan application transaction.	Small, 48.0	48.0
isSelfEmployed	Boolean	Indicates whether borrower is self-employed or owns the business.	Small, 48.0	48.0
jobTitle	String	Borrower's job title or employer's business or industry type.	Small, 48.0	48.0
lastModifiedBy	String	ID of the user who last modified this record.	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version	
lastModifiedDate	String	Date and time when a user last modified this record.	Small, 48.0	48.0	
lastReferencedDate	String	Date and time when a user last referenced this record.	Small, 48.0	48.0	
lastViewedDate	String	Date and time when a user last viewed this record.	Small, 48.0	48.0	
loanApplicantId	String	ID of the borrower record.	Small, 48.0	48.0	
loanApplicationId	String	ID of the loan application record.	Small, 48.0	48.0	
monthlyBaseIncomeAmount	Double	Borrower's monthly bonus from this job.	Small, 48.0	48.0	
monthlyBonusAmount	Double	Borrower's monthly bonus from this job.	Small, 48.0	48.0	
monthlyCommissionAmount	Double	Borrower's monthly commission from this job.	Small, 48.0	48.0	
monthlyIncome	Double	Borrower's monthly income or loss from this business.	Small, 48.0	48.0	
monthlyMilitaryEntitlementAmt	Double	Borrower's monthly military entitlement from this job.	Small, 48.0	48.0	
monthlyOtherIncomeAmount	Double	Borrower's other monthly income from this job.	Small, 48.0	48.0	
monthlyOvertimeAmount	Double	Borrower's monthly overtime income from this job.	Small, 48.0	48.0	
monthlyTotalIncomeAmount	Double	Borrower's monthly total income from this job.	Total Monthly Income	Small, 48.0	48.0
name	String	Name of the loan applicant employment.	Small, 48.0	48.0	
ownerId	String	ID of the user who owns this record.	Small, 48.0	48.0	
startDate	String	Name of the loan applicant employment.	Small, 48.0	48.0	
systemModstamp	String	Date and time when a user or automated process (such as a trigger) last modified this record.	Small, 48.0	48.0	

Borrower employment Result

Borrower employment result of the POST or PATCH request.

Property Name	Type	Description	Filter Group and Version	Available Version
externalId	String	ID that uniquely identifies imported data in an external data source (if applicable).	Small, 48.0	48.0
id	String	ID of the borrower.	Small, 48.0	48.0

Borrower Income Output

Represents details about the borrower and co-borrower current monthly income.

Property Name	Type	Description	Filter Group and Version	Available Version
createdById	String	ID of the user who created this record.	Small, 48.0	48.0
createdDate	String	Date and time when this record was created.	Small, 48.0	48.0
extendedFields	Extended Fields Output[]	Custom fields related to the income.	Big, 48.0	48.0
externalId	String	Identifier assigned to imported income data by external data source (if applicable).	Small, 48.0	48.0
id	String	ID of the income.	Small, 48.0	48.0
incomeSourceType	String	Source of borrower's monthly non-employment income.	Small, 48.0	48.0
isDeleted	Boolean	Indicates whether the income record is deleted.	Small, 48.0	48.0
lastModifiedById	String	ID of the user who last modified this record.	Small, 48.0	48.0
lastModifiedDate	String	Date and time when a user last modified this record.	Small, 48.0	48.0
lastReferencedDate	String	Date and time when a user last referenced this record.	Small, 48.0	48.0
lastViewedDate	String	Date and time when a user last viewed this record.	Small, 48.0	48.0
loanApplicantId	String	ID of the loan applicant record.	Small, 48.0	48.0
loanApplicationId	String	ID of the loan application record.	Small, 48.0	48.0
monthlyIncomeAmount	Double	Amount of borrower's monthly non-employment income from this source.	Small, 48.0	48.0
name	String	Name of the other monthly income.	Small, 48.0	48.0
ownerId	String	ID of the user who owns this record.	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
systemModstamp	String	Date and time when a user or automated process (such as a trigger) last modified this record.	Small, 48.0	48.0

Borrower Income Result

Borrower income result of the POST or PATCH request.

Property Name	Type	Description	Filter Group and Version	Available Version
externalId	String	ID that uniquely identifies imported data in an external data source (if applicable).	Small, 48.0	48.0
id	String	ID of the borrower.	Small, 48.0	48.0

Borrower Output

Represents details of the borrower or co-borrower for the loan application.

Property Name	Type	Description	Filter Group and Version	Available Version
addresses	Borrower Address Output[]	Borrower's addresses.	Big, 48.0	48.0
asianRaceSubType	String	Borrower's Asian race.	Small, 48.0	48.0
borrowerType	String	Applicant's borrower type.	Small, 48.0	48.0
citizenshipStatus	String	Borrower's citizenship status.	Small, 48.0	48.0
contactId	String	Contact associated with this borrower.	Small, 48.0	48.0
createdById	String	ID of the user who created this record.	Small, 48.0	48.0
createdDate	String	Date and time when this record was created.	Small, 48.0	48.0
declarations	Borrower Declaration Output[]	Borrower's declarations.	Big, 48.0	48.0
dependentCount	Integer	Borrower's number of dependents.	Small, 48.0	48.0
dependentsAge	String	Ages of borrower's dependents in a comma-separated list.	Small, 48.0	48.0
employments	Borrower Employment Output[]	Borrower's employments.	Big, 48.0	48.0
ethnicitySubType	String	Borrower's ethnicity.	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
ethnicityType	String	Borrower's ethnicity origin.	Small, 48.0	48.0
extendedFields	Extended Fields Output[]	Custom fields.	Big, 48.0	48.0
externalId	String	ID that uniquely identifies imported data in an external data source (if applicable).	Small, 48.0	48.0
genderType	String	Borrower's gender.	Small, 48.0	48.0
hasMilitaryService	Boolean	Indicates whether the borrower is serving in the United States Armed Forces or the borrower or the borrower's deceased spouse served in the past.	Small, 48.0	48.0
id	String	ID of the Borrower.	Small, 48.0	48.0
incomes	Borrower Income Output[]	Borrower's incomes.	Big, 48.0	48.0
isActiveMilitary	Boolean	Indicates whether borrower is currently on active duty with the United States Armed Forces.	Small, 48.0	48.0
isDeleted	Boolean	Indicates whether the title holder record is deleted.	Small, 48.0	48.0
isJointCredit	Boolean	Indicates whether borrower is applying for joint credit.	Small, 48.0	48.0
isSurvivingMilitarySpouse	Boolean	Indicates whether borrower is a surviving spouse of a veteran.	Small, 48.0	48.0
lastModifiedById	String	ID of the user who last modified this record.	Small, 48.0	48.0
lastModifiedDate	String	Date and time when a user last modified this record.	Small, 48.0	48.0
lastReferencedDate	String	Date and time when a user last referenced this record.	Small, 48.0	48.0
lastViewedDate	String	Date and time when a user last viewed this record.	Small, 48.0	48.0
loanApplicationId	String	ID of the loan application record.	Small, 48.0	48.0
maritalStatus	String	Borrower's marital status.	Small, 48.0	48.0
militaryTourExpirationMonth	Integer	Month that borrower's tour of service expires.	Small, 48.0	48.0
militaryTourExpirationYear	Integer	Year that borrower's tour of service expires.	Small, 48.0	48.0
name	String	Name of the borrower.	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
otherAsianRaceSubType	String	Borrower's Asian race if other is specified.	Small, 48.0	48.0
otherEthnicitySubType	String	Borrower's ethnicity if other is specified.	Small, 48.0	48.0
otherPacIslandSubType	String	Borrower's native Hawaiian or Pacific Islander race if other is specified.	Small, 48.0	48.0
ownerId	String	ID of the user who owns the record.	Small, 48.0	48.0
pacificIslanderSubType	String	Borrower's native Hawaiian or Pacific Islander race.	Small, 48.0	48.0
preferredLanguage	String	Borrower's preferred communication language.	Small, 48.0	48.0
raceType	String	Borrower's race.	Small, 48.0	48.0
systemModstamp	String	Date and time when a user or automated process (such as a trigger) last modified this record.	Small, 48.0	48.0
tribeName	String	Name of borrower's enrolled or principal tribe.	Small, 48.0	48.0
wasActiveMilitary	Boolean	Indicates whether borrower is currently retired, discharged, or separated from active military duty.	Small, 48.0	48.0
wasNonActivatedService	Boolean	Indicates whether borrower's only military service was as a non-activated Reserve soldier or as a non-activated member of the National Guard.	Small, 48.0	48.0

Borrower Result

Borrower result of the POST or PATCH request.

Property Name	Type	Description	Filter Group and Version	Available Version
addresses	Borrower Address Result[]	Borrower's addresses.	Big, 48.0	48.0
declarations	Borrower Declaration Result[]	Borrower's declarations.	Big, 48.0	48.0
employments	Borrower employment Result[]	Borrower's employments.	Big, 48.0	48.0
externalId	String	ID that uniquely identifies imported data in an external data source (if applicable).	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
id	String	ID of the orrower.	Small, 48.0	48.0
incomes	Borrower Income Result[]	Borrower's incomes.	Big, 48.0	48.0

Complaint Management Output

Output representation of the created public complaint.

JSON example

```
{
   "caseId":"500RO000002QBFLYA4",
   "caseNumber":"00001762",
   "publicComplaintId":"PC-0000000250"
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
caseId	String	ID of the case associated with the created complaint.	Big, 58.0	58.0
caseNumber	String	Case number associated with the created complaint.	Big, 58.0	58.0
publicComplaintId	String	ID of the created public complaint.	Big, 58.0	58.0

Ethoca Alert Callback Output

Ethoca alert callback output for dispute management.

Property Name	Type	Description	Filter Group and Version	Available Version
message	String	Message describing whether the request was successful.	Small, 60.0	60.0
statusCode	String	HTTP status code.	Small, 60.0	60.0

Extended Fields Output

Represents custom fields names and values.

Property Name	Type	Description	Filter Group and Version	Available Version
name	String	Name of the custom field.	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
`value`	String	Value of the custom field.	Small, 48.0	48.0

Financial Goal Details Output

Queried financial goal details.

Property Name	Type	Description	Filter Group and Version	Available Version
`financialGoalDetails`	Map<String, Object>	Fields requested in the `financialGoalFields` input property and their values.	Small, 59.0	59.0
`financialGoalFundings`	Financial Goal Funding Output[]	Fields requested in the `financialGoalFundingFields` input property and their values.	Small, 60.0	60.0
`financialGoalParties`	Financial Goal Party Output[]	Fields requested in the `financialGoalPartyFields` input property and their values.	Small, 59.0	59.0

Financial Goal Funding Output

Output for Financial Goal funding.

Property Name	Type	Description	Filter Group and Version	Available Version
`financialGoalFundingDetails`	Map<String, Object>	Map of Financial Goal funding details.	Small, 60.0	60.0

Financial Goal Party Output

Output for Financial Goal Parties.

Property Name	Type	Description	Filter Group and Version	Available Version
`financialGoalPartyDetails`	Map<String, Object>	Map of Financial Goal Party details.	Small, 59.0	59.0

Financial Goal Patch Output

Updated financial goal.

Property Name	Type	Description	Filter Group and Version	Available Version
`error`	String	Error message if the financial goal wasn't updated successfully.	Small, 59.0	59.0
`isUpdated`	Boolean	Specifies whether the update succeeded.	Small, 59.0	59.0

Financial Goals Create Output

Container for created financial goals and goal members.

Property Name	Type	Description	Filter Group and Version	Available Version
`results`	Financial Goals Create Result[]	List of goals and members or an error message.	Small, 59.0	59.0

Financial Goals Create Result

Created financial goals and goal members.

If creation is successful:

Property Name	Type	Description	Filter Group and Version	Available Version
`financialGoalId`	String	ID of the financial goal.	Small, 59.0	59.0
`financial GoalParties`	String[]	List of member IDs.	Small, 59.0	59.0
`isSuccess`	Boolean	Value is `true.`.	Small, 59.0	59.0

If creation is unsuccessful:

Property Name	Type	Description	Filter Group and Version	Available Version
`error`	String	Error message if the financial goal wasn't created successfully.	Small, 59.0	59.0
`isSuccess`	Boolean	Value is `false`.	Small, 59.0	59.0

Financial Goals List Output

Queried financial goals.

Property Name	Type	Description	Filter Group and Version	Available Version
financialGoals	Financial Goal Details Output[]	List of financial goals belonging to the parent record.	Small, 59.0	59.0

Financial Output

Output details for the financial transaction.

Property Name	Type	Description	Filter Group and Version	Available Version
borrowerClosingCostAmt	Double	Total closing costs due from borrower, including prepaid and initial escrow payments.	Small, 48.0	48.0
cashFromOrToBorrowerAmt	Double	Cash the borrower pays or receives at closing, not including reserves or other funds that may still require lender verification.	Small, 48.0	48.0
counselingAgencyName	String	Counseling provider's name if agency isn't HUD approved or if Housing Counseling Agency ID is unknown.	Small, 48.0	48.0
counselingAgencyProviderName	String	Education provider's name if agency isn't HUD-approved or if Housing Counseling Agency ID is unknown.	Small, 48.0	48.0
counselingCompleteBorrName	String	Name of borrower or borrowers who completed housing counseling.	Small, 48.0	48.0
counselingCompletionDate	String	Date borrower completed housing counseling.	Small, 48.0	48.0
createdById	String	ID of the user who created this record.	Small, 48.0	48.0
createdDate	String	Date and time when this record was created.	Small, 48.0	48.0
creditFromSeller	Double	Total amount of closing costs due from seller.	Small, 48.0	48.0
discountPointCostAmount	Double	Total cost of discount points purchased by the borrower due at closing.	Small, 48.0	48.0
estFirstMortgagePayment	Double	Proposed monthly first mortgage payment for loan application property, including principal and interest.	Small, 48.0	48.0
estHomeownerInsurancePayment	Double	Proposed monthly payment for homeowners insurance on application property.	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
estMortgageInsurancePayment	Double	Proposed monthly mortgage insurance payment on application property.	Small, 48.0	48.0
estOtherDuesPayment	Double	Proposed total monthly payment on application property for payments like homeowners association, co-op, condo, or planned unit development dues.	Small, 48.0	48.0
estOtherPayment	Double	Proposed total monthly payment for other housing expenses on application property.	Small, 48.0	48.0
estPropertyTaxesPayment	Double	Proposed monthly payment for real estate taxes on application property.	Small, 48.0	48.0
estSubordinateLienPayment	Double	Proposed total monthly payment for other mortgages or liens on loan application property, including principal and interest.	Small, 48.0	48.0
estSuppPropInsurancePayment	Double	Proposed monthly payment for supplemental property insurance like flood, earthquake, or umbrella policies on application property.	Small, 48.0	48.0
extendedFields	Extended Fields Output[]	Custom fields related to the transaction.	Big, 48.0	48.0
externalId	String	Identifier assigned to imported financial data by external data source (if applicable).	Small, 48.0	48.0
financeMortgageInsuranceAmt	Double	Total amount of financed mortgage insurance or financed mortgage insurance equivalent.	Small, 48.0	48.0
hasCompletedCounseling	Boolean	Indicates whether one or more borrowers completed housing counseling within the last 12 months.	Small, 48.0	48.0
hasHomeownerEducation	Boolean	Indicates whether one or more borrowers completed homeownership education within the last 12 months.	Small, 48.0	48.0
homeEdCompletedBorrowerName	String	Name of borrower or borrowers who completed homeownership education.	Small, 48.0	48.0
homeownerEdCompleteDate	String	Date borrower completed homeownership education.	Small, 48.0	48.0
homeownerEdFormat	String	Indicates the format of homeownership education attended by borrower.	Small, 48.0	48.0
housingCounselingFormat	String	Indicates the format of the housing counseling completed by borrower.	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
hudApproveAgencyId	String	Home counseling provider's Housing Counseling Agency ID if agency is HUD-approved.	Small, 48.0	48.0
hudApprovedProviderId	String	Homeownership education provider's Housing Counseling Agency ID if agency is HUD-approved.	Small, 48.0	48.0
id	String	ID of the loan application financial.	Small, 48.0	48.0
isDeleted	Boolean	Indicates whether the financial record is deleted.	Small, 48.0	48.0
landAcquiredSeparatelyCost	Double	Price of land if purchased separately from the building or structure.	Small, 48.0	48.0
lastModifiedById	String	ID of the user who last modified this record.	Small, 48.0	48.0
lastModifiedDate	String	Date and time when a user last modified this record.	Small, 48.0	48.0
lastReferencedDate	String	Date and time when a user last referenced this record.	Small, 48.0	48.0
lastViewedDate	String	Date and time when a user last viewed this record.	Small, 48.0	48.0
loanAmount	Double	Total loan amount.	Small, 48.0	48.0
loanAmtExclFinMortgageInsurance	Double	Loan amount excluding financed mortgage insurance or financed mortgage insurance equivalent.	Small, 48.0	48.0
loanApplicationId	String	ID of the loan application record.	Small, 48.0	48.0
name	String	Name of the loan application financial.	Small, 48.0	48.0
otherCredit	Double	Total amount of all purchase credits like borrower credits, credits from third parties, and non-cash seller credits.	Small, 48.0	48.0
otherNewMortgageLoanAmt	Double	Total amount of other new borrower mortgages, both first lien and subordinate lien, on the application property.	Small, 48.0	48.0
outstandingLoanAmount	Double	Total amount of all mortgage loans on application property to be paid off by refinance loan.	Small, 48.0	48.0
purchasePriceAmount	Double	Purchase price for the property.	Small, 48.0	48.0
remodelAndRepairsAmount	Double	Cost of any alterations, improvements, and repairs on the property.	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
systemModstamp	String	Date and time when a user or automated process (such as a trigger) last modified this record.	Small, 48.0	48.0
totalCashDueFromBorrower	Double	Total cash due from borrower at closing.	Small, 48.0	48.0
totalCredit	Double	Total borrower credits.	Small, 48.0	48.0
totalDebtPaidOffAmount	Double	Total amount of all non-application property liabilities borrower indicated would be paid off on or before closing.	Small, 48.0	48.0
totalEstPaymentAmt	Double	Proposed total monthly payment for application property.	Small, 48.0	48.0
totalMortgageLoanAndCreditAmt	Double	Total mortgage loans plus total credits.	Small, 48.0	48.0
totalMortgageLoansAmount	Double	Total amount of loan.	Small, 48.0	48.0

Financial Result

Financial result of the POST or PATCH request.

Property Name	Type	Description	Filter Group and Version	Available Version
externalId	String	ID that uniquely identifies imported data in an external data source (if applicable).	Small, 48.0	48.0
id	String	ID of the borrower.	Small, 48.0	48.0

Liability Output

Details about the borrower and co-borrower current liabilities.

Property Name	Type	Description	Filter Group and Version	Available Version
accountNumber	String	Borrower's account number with lender or creditor.	Small, 48.0	48.0
accountType	String	Personal debt borrower owes like credit card balances, other debts, and leases.	Small, 48.0	48.0
borrowersExternalIds	String[]	Identifier assigned to imported borrowers data by external data source (if applicable).	Big, 48.0	48.0
borrowersIds	String[]	IDs of the borrowers.	Big, 48.0	48.0
createdById	String	ID of the user who created this record.	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
createdDate	String	Date and time when this record was created.	Small, 48.0	48.0
creditLimitAmount	Double	Credit limit of real estate loan or line of credit.	Small, 48.0	48.0
creditorName	String	Lender or creditor owed the debt.	Small, 48.0	48.0
extendedFields	Extended Fields Output[]	Custom fields related to the asset.	Big, 48.0	48.0
externalId	String	Identifier assigned to imported liability data by external data source (if applicable).	Small, 48.0	48.0
id	String	ID of the liability.	Small, 48.0	48.0
isDeleted	Boolean	Indicates whether the liability record is deleted.	Small, 48.0	48.0
isJointLiability	Boolean	Indicates whether borrower holds liability jointly.	Small, 48.0	48.0
lastModifiedById	String	ID of the user who last modified this record.	Small, 48.0	48.0
lastModifiedDate	String	Date and time when a user last modified this record.	Small, 48.0	48.0
lastReferencedDate	String	Date and time when a user last referenced this record.	Small, 48.0	48.0
lastViewedDate	String	Date and time when a user last viewed this record.	Small, 48.0	48.0
liabilityClass	String	Include the liability's monthly payment in this liability class monthly payment total.	Small, 48.0	48.0
loanApplicationAssetId	String	ID of the loan application asset record.	Small, 48.0	48.0
loanApplicationId	String	ID of the loan application record.	Small, 48.0	48.0
loanType	String	Existing real estate loan type.	Small, 48.0	48.0
monthlyPaymentAmount	Double	Borrower's monthly payment required to keep debt account current.	Small, 48.0	48.0
name	String	Name of the liability.	Small, 48.0	48.0
otherLiabilityType	String	Identifies type of other borrower expense or liability.	Small, 48.0	48.0
ownerId	String	ID of the user who owns the record.	Small, 48.0	48.0
shouldBePaidInFull	Boolean	Indicates whether borrower to pay off debt on or before closing.	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
systemModstamp	String	Date and time when a user or automated process (such as a trigger) last modified this record.	Small, 48.0	48.0
unpaidBalanceAmount	Double	Unpaid liability balance when borrower completed loan application.	Small, 48.0	48.0

Liability Result

Liability result of the POST or PATCH request.

Property Name	Type	Description	Filter Group and Version	Available Version
externalId	String	ID that uniquely identifies imported data in an external data source (if applicable).	Small, 48.0	48.0
id	String	ID of the borrower.	Small, 48.0	48.0

Mapper Result

Represents the Mapper result.

```
{
  "assetsAndLiabilities": [
    "a03B000000735LwIAI",
    "a03B000000735LxIAI",
    "a03B000000735LyIAI"
  ],
  "customerProperties": [
    "0b8B0000000GnjdIAC"
  ],
  "errors": [],
  "financialAccounts": [
    "a0EB000000227WtMAI",
    "a0EB000000227WuMAI",
    "a0EB000000227WvMAI"
  ],
  "personAccounts": [
    "001B000001K8Zx5IAF"
  ],
  "status": "SUCCESS"
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
assetsAndLiabilities	String[]	List of IDs created for AssetsAndLiabilities records.	Big, 49.0	49.0

Property Name	Type	Description	Filter Group and Version	Available Version
customerProperties	String[]	List of IDs created for CustomerProperty records.	Big, 49.0	49.0
errors	String[]	List of errors that occurred during the creation process.	Big, 49.0	49.0
financialAccounts	String[]	List of IDs created for FinancialAccount records.	Big, 49.0	49.0
personAccounts	String[]	List of IDs created for PersonAccount records.	Big, 49.0	49.0
status	String	Whether the creation process succeeded, partially succeeded, or failed.	Small, 49.0	49.0

Mapper Result Representation

Represents the result representation of the POST method.

JSON example

```
{
  "result": {
    "assetsAndLiabilities": [
      "a03B000000735LwIAI",
      "a03B000000735LxIAI",
      "a03B000000735LyIAI"
    ],
    "customerProperties": [
      "0b8B0000000GnjdIAC"
    ],
    "errors": [],
    "financialAccounts": [
      "a0EB000000227WtMAI",
      "a0EB000000227WuMAI",
      "a0EB000000227WvMAI"
    ],
    "personAccounts": [
      "001B000001K8Zx5IAF"
    ],
    "status": "SUCCESS"
  }
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
message	String	Success or failure message.	Small, 49.0	49.0
result	Mapper Result on page 1219	Mapper result.	Small, 49.0	49.0

Mortgage Information Output

Represents the output of the GET method.

Property Name	Type	Description	Filter Group and Version	Available Version
accountId	String	Account associated with the application.	Small, 48.0	48.0
amortizationTerm	Double	Duration of the amortization in months.	Small, 48.0	48.0
amortizationType	String	Amortization type for loan.	Small, 48.0	48.0
assets	Asset Output[]	Represents details about the borrower's and co-borrower's current personal and real property.	Big, 48.0	48.0
balloonTermMonths	Double	Number of months during which the cumulative loan must be repaid.	Small, 48.0	48.0
borrowers	Borrower Output[]	List of borrowers for the loan application.	Big, 48.0	48.0
createdById	String	ID of the user who created this record.	Small, 48.0	48.0
createdDate	String	Date and time when this record was created.	Small, 48.0	48.0
estateHoldType	String	Lender's lien is on both land and structure (fee simple) or just structure (leasehold).	Small, 48.0	48.0
extendedFields	Extended Fields Output[]	Represents custom fields related to a loan application.	Big, 48.0	48.0
externalId	String	Identifier assigned to imported data by external data source (if applicable).	Small, 48.0	48.0
financials	Financial Output[]	Represents transaction details for a loan application.	Big, 48.0	48.0
hasOtherLoanFeature	Boolean	Indicates whether loan has other amortization feature.	Small, 48.0	48.0
hasPrepaymentPenalty	Boolean	Indicates whether penalty is incurred if borrower pays off loan balance before the loan term expires.	Small, 48.0	48.0
id	String	ID of the mortgage record.	Small, 48.0	48.0
improvementCost	Double	Construction costs for a construction loan or home improvement costs for a renovation loan.	Small, 48.0	48.0
initialBuydownRate	Double	Initial lesser interest rate for the loan.	Small, 48.0	48.0
interestOnlyMonthCount	Double	Number of months that loan payments are interest only.	Small, 48.0	48.0
interestRate	Double	Interest rate for loan.	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
isBalloon	Boolean	Indicates whether borrower is applying for a balloon payment mortgage.	Small, 48.0	48.0
isBorrowerCommunityPropState	Boolean	Indicates whether the borrower lives in community property state.	Small, 48.0	48.0
isConstructionToPermanent	Boolean	Indicates whether at least one borrower lives in a community property state.	Small, 48.0	48.0
isContractForDeed	Boolean	Indicates whether loan proceeds is to pay off balance due on a contract for deed or land contract.	Small, 48.0	48.0
isDeleted	Boolean	Indicates whether the record is deleted.	Small, 48.0	48.0
isEnergyRelatedImprovement	Boolean	Indicates whether loan is to finance energy-related improvements.	Small, 48.0	48.0
isInterestOnly	Boolean	Indicates whether borrower is applying for an interest-only mortgage.	Small, 48.0	48.0
isNegativeAmortization	Boolean	Indicates whether loan allows for negative amortization where shortfalls in interest payments are added to the outstanding loan balance.	Small, 48.0	48.0
isPropInCommunityPropState	Boolean	Indicates whether property is located in a community property state.	Small, 48.0	48.0
isRenovation	Boolean	Indicates whether loan proceeds to finance cost of renovations to the property, and renovation value is included in the property's appraised value.	Small, 48.0	48.0
isSingleClosing	Boolean	Indicates whether construction and permanent loans have a single combined closing. Once construction is complete, loan converts to a traditional mortgage.	Small, 48.0	48.0
isSubjectToPriorityLien	Boolean	Indicates whether property is currently subject to an energy-related lien that could take priority over the first mortgage lien.	Small, 48.0	48.0
isTempIntRateBuydown	Boolean	Indicates whether borrower is applying for loan with an initially reduced interest payment in exchange for an up-front cash deposit.	Small, 48.0	48.0
lastModifiedById	String	ID of the user who last modified this record.	Small, 48.0	48.0
lastModifiedDate	String	Date and time when a user last modified this record.	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
lastReferencedDate	String	Date and time when a user last referenced this record.	Small, 48.0	48.0
lastViewedDate	String	Date and time when a user last viewed this record.	Small, 48.0	48.0
leaseHoldExpirationDate	String	Date when leasehold expires if land is leased.	Small, 48.0	48.0
liabilities	Liability Output[]	Represents details about the borrower and co-borrower current liabilities.	Big, 48.0	48.0
loanPurpose	String	Purpose of the loan.	Small, 48.0	48.0
lotAcquiredDate	String	Month and year property or land was purchased.	Small, 48.0	48.0
lotOriginalCost	Double	Original property cost (refinance) or original land cost (construction).	Small, 48.0	48.0
monthsBeforeFirstAdj	Double	Initial period prior to first adjustment in months.	Small, 48.0	48.0
monthsBetweenAdjustments	Double	Number of months before the first rate adjustment for an adjustable rate loan.	Small, 48.0	48.0
mortgageLienType	String	Type of mortgage lien associated with this loan application.	Small, 48.0	48.0
mortgageProgramType	String	Type of mortgage program applied for.	Small, 48.0	48.0
name	String	Name of the residential loan application.	Small, 48.0	48.0
nativeLandTenure	String	Property is located on an area reserved by or for an Indian land, village, or tribe to live on and use.	Small, 48.0	48.0
opportunityId	String	Opportunity associated with the application.	Small, 48.0	48.0
otherAmortizationType	String	Description of other amortization type for government loans.	Small, 48.0	48.0
otherLoanFeature	String	Description of other loan amortization feature.	Small, 48.0	48.0
otherLoanPurpose	String	What the borrower will use the loan for if other was specified.	Small, 48.0	48.0
otherMortgageProgramType	String	Description of the other mortgage type.	Small, 48.0	48.0
otherRefinanceProgType	String	Refinance program name if other was specified.	Small, 48.0	48.0
ownerId	String	ID of the user who owns this record.	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
prepayPenaltyTermMonth	Double	Number of months during which borrower incurs a penalty for early payoff of the loan balance.	Small, 48.0	48.0
projectType	String	Specifies the type of project that the property belongs to.	Small, 48.0	48.0
properties	Property Output[]	Represents details of the property the loan application finances.	Big, 48.0	48.0
refinanceProgramType	String	The applicable refinance program type based on the investor, guarantor, or lender guidelines.	Small, 48.0	48.0
refinanceType	String	Refinance loan type.	Small, 48.0	48.0
status	String	Indicates the current status of the loan application.	Small, 48.0	48.0
systemModstamp	String	Represents details of borrowers who are applying to hold title to the property the loan application finances.	Small, 48.0	48.0
titleHolders	Title Holder Output[]	Way the borrower or borrowers take title for the loan.	Big, 48.0	48.0
titleType	String	Number of months during which borrower incurs a penalty for early payoff of the loan balance.	Small, 48.0	48.0
totalFinLiabilityMonthlyAmt	Double	Total monthly amount of borrowers' outstanding financial liabilities payments excluding real estate.	Small, 48.0	48.0
totalFinancialAssetAmount	Double	Total amount of borrowers' financial account assets excluding real estate.	Small, 48.0	48.0
totalOtherAssetAmount	Double	Total amount of borrowers' other assets excluding real estate.	Small, 48.0	48.0
totalOtherLiabilityMonthlyAmt	Double	Total monthly amount of borrowers' other monthly liability and expense payments excluding real estate.	Small, 48.0	48.0
trustTitleType	String	Title to be held in a living trust or a land trust.	Small, 48.0	48.0

Mortgage Information Response

Response for the GET method.

Property Name	Type	Description	Filter Group and Version	Available Version
`message`	String	Error message, if any.	Small, 48.0	48.0
`result`	Mortgage Information Output[]	Data of the mortgage result.	Small, 48.0	48.0

Mortgage Response

Response for the POST or PATCH method.

Property Name	Type	Description	Filter Group and Version	Available Version
`message`	String	Error message, if any.	Small, 48.0	48.0
`result`	Mortgage Result[]	Representation of mortgage result.	Small, 48.0	48.0

Mortgage Result

Represents the result of the POST or PATCH method.

Property Name	Type	Description	Filter Group and Version	Available Version
`assets`	Asset Result[]	Represents details about the borrower's and co-borrower's current personal and real property.	Big, 48.0	48.0
`borrowers`	Borrower Result[]	Represents details about the borrowers and co-borrowers.	Big, 48.0	48.0
`externalId`	String	Identifier assigned to imported title holder data by external data sourceif applicable).	Small, 48.0	48.0
`financials`	Financial Result[]	Represents transaction details for a loan application.	Big, 48.0	48.0
`id`	String	ID of the loan application.	Small, 48.0	48.0
`liabilities`	Liability Result[]	Represents details about the borrower and co-borrower current liabilities.	Big, 48.0	48.0
`properties`	Property Result[]	Represents details of the property the loan application finances.	Big, 48.0	48.0
`titleHolders`	Title Holder Result[]	Represents details of borrowers who are applying to hold title to the property the loan application finances.	Big, 48.0	48.0

Property Result

Property result of the POST or PATCH request.

Property Name	Type	Description	Filter Group and Version	Available Version
externalId	String	ID that uniquely identifies imported data in an external data source (if applicable).	Small, 48.0	48.0
id	String	ID of the borrower.	Small, 48.0	48.0

Property Output

Represents details of the property the loan application finances.

Property Name	Type	Description	Filter Group and Version	Available Version
createdById	String	ID of the user who created this record.	Small, 48.0	48.0
createdDate	String	Date and time when this record was created.	Small, 48.0	48.0
esMonthlyRentalIncome	Double	Estimated gross monthly rental income per unit if application property is a two to four unit primary residence or investment property.	Small, 48.0	48.0
esNetMonthlyRentalIncome	Double	Estimated net monthly rental income per unit if application property is a two-to-four unit primary residence or investment property.	Small, 48.0	48.0
extendedFields	Extended Fields Output[]	Custom fields related to the property.	Big, 48.0	48.0
externalId	String	Identifier assigned to imported property data by external data source (if applicable).	Small, 48.0	48.0
id	String	ID of the property.	Small, 48.0	48.0
isDeleted	Boolean	Indicates whether the property record is deleted.	Small, 48.0	48.0
isManufacturedHome	Boolean	Indicates whether application property is a manufactured home.	Small, 48.0	48.0
isMixedUseProperty	Boolean	Indicates whether application property includes commercial space set aside for business use.	Small, 48.0	48.0
lastModifiedById	String	ID of the user who last modified this record.	Small, 48.0	48.0
lastModifiedDate	String	Date and time when a user last modified this record.	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
`lastReferencedDate`	String	Date and time when a user last referenced this record.	Small, 48.0	48.0
`lastViewedDate`	String	Date and time when a user last viewed this record.	Small, 48.0	48.0
`loanApplicationId`	String	ID of the loan application record.	Small, 48.0	48.0
`loanPurposeType`	String	What the borrower will use the loan for.	Small, 48.0	48.0
`name`	String	Name of loan application property.	Small, 48.0	48.0
`propertyAddress`	Address Output	Physical address of the property to be financed.	Small, 48.0	48.0
`propertyUseType`	String	Borrower's stated use for the property.	Small, 48.0	48.0
`propertyValue`	Double	Estimated present market value of the application property.	Small, 48.0	48.0
`requestedLoanAmount`	Double	Total loan amount the borrower is applying for.	Small, 48.0	48.0
`systemModstamp`	String	Date and time when a user or automated process (such as a trigger) last modified this record.	Small, 48.0	48.0
`unitsFinancedCount`	Integer	Number of units being financed at this address.	Small, 48.0	48.0

Record Alert

Output representation of the details of a record alert.

Property Name	Type	Description	Filter Group and Version	Available Version
`actions`	Record Alert Action Info Collection	Represents the details of an action taken on a record alert.	Small, 54.0	54.0
`active`	Boolean	Indicates whether a record alert is active (`true`) or not (`false`).	Small, 54.0	54.0
`description`	String	The description of a record alert.	Small, 54.0	54.0
`effectiveDate`	String	The start date and time from when an active record alert is in effect.	Small, 54.0	54.0
`id`	String	The record alert ID.	Small, 54.0	54.0
`parentId`	String	The parent ID of a record alert.	Small, 54.0	54.0
`recordAlertCategoryName`	String	The category name of a record alert.	Small, 54.0	54.0

Property Name	Type	Description	Filter Group and Version	Available Version
`severity`	String	Indicates the degree of impact of a record alert. Possible values are: • `Error` • `Info` • `Warning`	Small, 54.0	54.0
`source`	String	Identifies the source system that generated the record alert. Possible values are: • `External` • `Internal`	Small, 54.0	54.0
`sourceSystemId`	String	The ID of the source system that this record alert was sourced from.	Small, 54.0	54.0
`subject`	String	The subject line of a record alert.	Small, 54.0	54.0
`validUntilDate`	String	The date and time from when a record alert is no longer valid.	Small, 54.0	54.0
`whatId`	String	The Salesforce object record ID on which a record alert is created.	Small, 54.0	54.0

Record Alert Collection

Output representation of a collection of record alerts.

Property Name	Type	Description	Filter Group and Version	Available Version
`recordAlerts`	Record Alert[]	Represents the details of a record alert.	Small, 54.0	54.0

Record Alert Collection Map

Output representation of the bulk record alerts request.

JSON example

```
{
  "hasErrors": true,
  "results": {
    "001RO000003KPW0YAO": {
      "recordAlertErrors": [
        {}
      ],
```

```
    "recordAlerts": [
      {
        "actions": {
          "actionInfoCollection": [
            {
              "actionName": "snooze",
              "parameters": [
                "snoozeUntilDate"
              ]
            },
            {
              "actionName": "dismiss",
              "parameters": []
            }
          ]
        },
        "active": true,
        "description": "Alert Description",
        "effectiveDate": "2022-03-10T20:00:00.000Z",
        "id": "0qZRO0000000008o",
        "severity": "Error",
        "snoozeUntilDate": "2022-03-12T19:09:06.000Z",
        "source": "Internal",
        "subject": "Alert Subject",
        "validUntilDate": "2022-03-30T19:00:00.000Z",
        "whatId": "001RO000003KPW0"
      }
    ],
    "status": "SUCCESS"
  },
  "001RO000003NJJrYAO": {
    "recordAlertErrors": [
      {
        "errorCode": "Apex_Execution_Error",
        "errorMessage": "Insufficient access to record"
      }
    ],
    "recordAlerts": [
      {
        "actions": {
          "actionInfoCollection": [
            {
              "actionName": "snooze",
              "parameters": [
                "snoozeUntilDate"
              ]
            },
            {
              "actionName": "dismiss",
              "parameters": []
            }
          ]
        },
        "active": true,
```

```
          "description": "Alert Description",
          "effectiveDate": "2022-03-08T20:00:00.000Z",
          "id": "0qZRO00000000BO",
          "severity": "Info",
          "snoozeUntilDate": "2022-03-21T15:26:45.000Z",
          "source": "Internal",
          "subject": "Alert Subject",
          "validUntilDate": "2022-03-31T19:00:00.000Z",
          "whatId": "001RO000003NJJr"
        }
      ]
    },
    "status": "PARTIAL_SUCCESS"
  }
}
```


Property Name	Type	Description	Filter Group and Version	Available Version
`hasErrors`	Boolean	Indicates whether at least one of the results in the result set contains an error (`true`) or not (`false`).	Small, 55.0	55.0
`results`	Map<String, Record Alert Collection>	Represents the collection of record alerts.	Small, 55.0	55.0

Record Alert Action Info

Output representation of the information of the record alert action.

Property Name	Type	Description	Filter Group and Version	Available Version
`actionName`	String	The name of the action performed on a record alert. Possible values are: • `Dismiss` • `Snooze`	Small, 54.0	54.0
`parameters`	String[]	List of parameters specified for the record alert action.	Small, 54.0	54.0

Record Alert Action Info Collection

Output representation of the details of an action on the record alert.

Property Name	Type	Description	Filter Group and Version	Available Version
actionInfoCollection	Record Alert Action Info[]	Represents the action details of a record alert.	Small, 54.0	54.0

Title Holder Output

Represents details of borrowers who are applying to hold title to the property the loan application finances.

Property Name	Type	Description	Filter Group and Version	Available Version
createdById	String	ID of the user who created this record.	Small, 48.0	48.0
createdDate	String	Date and time when this record was created.	Small, 48.0	48.0
extendedFields	Extended Fields Output[]	Custom fields related to the title holder.	Big, 48.0	48.0
externalId	String	Identifier assigned to imported title holder data by external data source (if applicable).	Small, 48.0	48.0
id	String	ID of the title holder.	Small, 48.0	48.0
isCurrentTitleHolder	Boolean	Indicates whether person is a current title holder on property to be refinanced.	Small, 48.0	48.0
isDeleted	Boolean	Indicates whether the title holder record is deleted.	Small, 48.0	48.0
lastModifiedById	String	ID of the user who last modified this record.	Small, 48.0	48.0
lastModifiedDate	String	Date and time when a user last modified this record.	Small, 48.0	48.0
lastReferencedDate	String	Date and time when a user last referenced this record.	Small, 48.0	48.0
lastViewedDate	String	Date and time when a user last viewed this record.	Small, 48.0	48.0
loanApplicationId	String	ID of the loan application record.	Small, 48.0	48.0
name	String	Name of the loan application title holder.	Small, 48.0	48.0
systemModstamp	String	Date and time when a user or automated process (such as a trigger) last modified this record.	Small, 48.0	48.0
titleHolderName	String	Name of the person on the title for the property associated with the loan application.	Small, 48.0	48.0

Title Holder Result

Title holder result of the POST or PATCH request.

Property Name	Type	Description	Filter Group and Version	Available Version
`externalId`	String	ID that uniquely identifies imported data in an external data source (if applicable).	Small, 48.0	48.0
`id`	String	ID of the borrower.	Small, 48.0	48.0

Retrieval Summary Result

Output representation of a retrieval summary definition call.

JSON Example

Property Name	Type	Description	Filter Group and Version	Available Version
`lastRefreshDate`	Long	Last refresh date of the rollups.	Small, 61.0	61.0
`rootNode`	Retrieval Summary Result Root Node	Developer name of the fields.	Small, 61.0	61.0

Retrieval Summary Result Node

Output representation of the result of a retrieval summary definition call.

Property Name	Type	Description	Filter Group and Version	Available Version
`label`	String	Label of a node.	Small, 61.0	61.0
`name`	String	Name of a node.	Small, 61.0	61.0
`records`	Retrieval Summary Result Record[]	Record on a node.	Small, 61.0	61.0
`type`	String	Type of the node.	Small, 61.0	61.0

Retrieval Summary Result Record

Output representation of a record for the result of a retrieval summary definition call.

Property Name	Type	Description	Filter Group and Version	Available Version
`fields`	Map<String, Object>	Fields on a record.	Small, 61.0	61.0

Retrieval Summary Result Root Node

Output representation of the result of a retrieval summary definition call.

Property Name	Type	Description	Filter Group and Version	Available Version
`children`	Retrieval Summary Result Node[]	Child nodes of a root node.	Small, 61.0	61.0
`fields`	Map<String, Object>	Fields on a root node.	Small, 61.0	61.0
`name`	String	Object of the root node.	Small, 61.0	61.0
`type`	String	Type of the root node.	Small, 61.0	61.0

AccountRelationhipShareRule

Represents the rule that determines which object records are shared, how they are shared, the account relationship type that shares the records, and the level of access granted to the records.

This type extends the MetadataWithContent metadata type and inherits its `content` and `fullName` fields.

AccountRelationhipShareRule

The FSC Insurance permission set in Financial Services Cloud exposes additional values for the accountToCriteriaField and entityType fields on the AccountRelationshipShareRule metadata type.

Field Name	Field Type	Description
`accountToCriteriaField`	string	Criteria that must be met for the data to be shared. This field shows these additional values for Insurance for Financial Services Cloud. • `BusinessMilestone.OwnerId` • `BusinessMilestone.PrimaryAccountId` • `Claim.AccountId` • `Claim.OwnerId` • `CustomerProperty.OwnerId` • `CustomerProperty.PrimaryOwnerId` • `InsurancePolicy.NameInsuredId` • `InsurancePolicy.OwnerId` • `PersonLifeEvent.OwnerId`
`entityType`	string	The type of data shared by this rule. This field shows these additional values for Insurance for Financial Services Cloud. • `BusinessMilestone` • `Claim` • `CustomerProperty` • `InsurancePolicy` • `PersonLifeEvent`

SEE ALSO:

Metadata API Developer Guide: AccountRelationshipShareRule

AssessmentQuestion

Represents the container object that stores the questions required for an assessment.

Parent Type

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

File Suffix and Directory Location

AssessmentQuestion components have the suffix `.AssessmentQuestion` and are stored in the `AssessmentQuestions` folder.

Version

AssessmentQuestion components are available in API version 55.0 and later.

Fields

Field Name	Description
`assessmentQuestionVersion`	**Field Type** AssessmentQuestionVersion **Description** The object that stores the question versions for the assessment questions.
`dataType`	**Field Type** string **Description** Required. The data type of the assessment question.
`developerName`	**Field Type** string **Description** Required. The developer name of the assessment question. Can contain only underscores and alphanumeric characters and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.
`displayTextCategory`	**Field Type** string

Field Name	Description
	Description Specifies the category of the display text when the data type is Text Block.
formulaResponseDataType	**Field Type** string **Description** Specifies the data type of the question response calculated by a formula.
name	**Field Type** string **Description** Required. The name of the record.
questionCategory	**Field Type** string **Description** Required. Stores the question category.
relatedQuestion	**Field Type** string **Description** Specifies the related question. Used to define a question hierarchy.

AssessmentQuestionVersion

Stores the question versions for the assessment questions.

Field Name	Description
additionalInformation	**Field Type** string **Description** The additional details for a UI element, such as the disclosure text.
description	**Field Type** string **Description** The description for the assessment question. This text isn't rendered on the assessment.

Field Name	Description
`guidanceInformation`	**Field Type** string **Description** The guidance for the assessment question.
`helpText`	**Field Type** string **Description** The text that's added as an info bubble in the UI element related to the assessment question.
`isActive`	**Field Type** boolean **Description** Required. Indicates whether the current version of the assessment question is set to active (`true`) or not (`false`). The default value is `false`.
`name`	**Field Type** string **Description** Required. Name of the assessment question version record.
`optionSourceResponseValue`	**Field Type** boolean **Description** Indicates whether the response value source for an assessment question is configured as custom (`true`) or sObject in the OmniStudio designer (`false`). The default value is `false`.
`questionText`	**Field Type** string **Description** Required. The assessment question text. Contains the label for the assessment question that appears on the assessment.
`responseValues`	**Field Type** string

Field Name	Description
	Description Holds the values to be defined in the picklist, multiselect picklist, or radio buttons.
`status`	**Field Type** string **Description** Required. Status of the assessment question version. Possible values are Draft, Active, or Archived.
`versionNumber`	**Field Type** int **Description** Required. The assessment question version number.

Declarative Metadata Sample Definition

The following is an example of an AssessmentQuestion component.

```
<?xml version="1.0" encoding="UTF-8"?>
<AssessmentQuestion
 xmlns="http://soap.sforce.com/2006/04/metadata">
 <assessmentQuestionVersion>
  <additionalInformation>ParentQuestionDevName AI</additionalInformation>
  <description>ParentQuestionDevName Desc</description>
  <helpText>ParentQuestionDevName HT</helpText>
  <isActive>true</isActive>
  <name>ParentQuestionDevName</name>
  <optionSourceResponseValue>true</optionSourceResponseValue>
  <questionText>ParentQuestionDevName Text</questionText>
  <status>Active</status>
  <versionNumber>1</versionNumber>
 </assessmentQuestionVersion>
 <dataType>DateTime</dataType>
 <developerName>ParentQuestionDevName</developerName>
 <name>ParentQuestionDevName</name>
 <questionCategory>Demographic</questionCategory>
</AssessmentQuestion>
```

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

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

```
  <members>*</members>
  <name>AssessmentQuestion</name>
 </types>
 <version>55.0</version>
</Package>
```

Wildcard Support in the Manifest File

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

Usage

Before you retrieve assessment questions, we recommend that you review these considerations.

- When you retrieve an assessment question, you also get the related assessment question version with the status Active..

  Note: If an active assessment question version doesn't exist for the assessment question, then the latest assessment question version with Status as Draft is retrieved.

- The value for the `<status>` tag in the XML definition must match the status of the related assessment question version.
- If an assessment question has a related assessment question (parent question), the XML definition must include the developer name of the related assessment question.
- If the fields of an assessment question contain values, the XML definition must contain tags with those values when retrieving it.

Before you deploy assessment questions, we recommend that you review these considerations.

- If the Related Question isn't available in the target org, deploying the assessment question fails.
- If an assessment question with the same developer name exists in the target org, deploying the assessment question updates the values of the other fields in the target org.
- If the `<versionNumber>` tag is present in the XML definition of an assessment question, deploying creates a version for that question in the target org.
- If the Related Questions aren't available in target org but available in the package, then deploying the questions inserts the Related Questions in the correct order.
- If the assessment questions are associated with flows of type Discovery Framework Data Capture Flow, then deploy the assessment questions first. After deploying the assessment questions, deploy the flows.

AssessmentQuestionSet

Represents the container object for Assessment Questions.

Parent Type

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

File Suffix and Directory Location

AssessmentQuestionSet components have the suffix `.AssessmentQuestionSet` and are stored in the `AssessmentQuestionSets` folder.

Version

AssessmentQuestionSet components are available in API version 55.0 and later.

Fields

Field Name	Description
`assessmentQuestionDeveloperNames`	**Field Type** string[] **Description** The developer names for the assessment question. Can contain only underscores and alphanumeric characters and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.
`developerName`	**Field Type** string **Description** Required. The developer name for the assessment question set. Can contain only underscores and alphanumeric characters and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.
`name`	**Field Type** string **Description** Required. The question set name.

Declarative Metadata Sample Definition

The following is an example of an AssessmentQuestionSet component.

```
<?xml version="1.0" encoding="UTF-8"?>
<AssessmentQuestionSet
 xmlns="http://soap.sforce.com/2006/04/metadata">
 <developerName>QuestionSetDevName</developerName>
```

```
 <name>QuestionSetName</name>
 <assessmentQuestionDeveloperNames>QuestionDevName</assessmentQuestionDeveloperNames>
</AssessmentQuestionSet>
```

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

```
<?xml version="1.0" encoding="UTF-8"?>
<Package
 xmlns="http://soap.sforce.com/2006/04/metadata">
 <types>
  <members>*</members>
  <name>AssessmentQuestion</name>
 </types>
 <types>
  <members>*</members>
  <name>AssessmentQuestionSet</name>
 </types>
 <version>55.0</version>
</Package>
```

Wildcard Support in the Manifest File

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

Usage

Before you retrieve assessment question sets, we recommend that you review these considerations.

- When retrieving an assessment question set, if its fields contain values, then the XML definition must contain tags with those values.
- When retrieving an assessment question set, if that set is associated with multiple questions, then the XML definition must contain developer names of all the associated questions.

Before you deploy assessment question sets, we recommend that you review these considerations.

- When deploying an assessment question set, if an assessment question set with the same developer name doesn't exist in the target org, deploying creates one with that name.
- If an assessment question set with the same developer name exists in the target org, then deploying the question set updates the values of the other fields in the target org.
- If the questions associated with the assessment question set don't exist in the target org, deploying the assessment question set fails.
- If the questions associated with the assessment question set don’t exist in the target org but are available in the package, then deploying the assessment question sets inserts the questions in the correct order.

ClaimFinancialSettings

Represents the configuration settings for Insurance Claim Financial Services.

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

Parent Type

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

File Suffix and Directory Location

ClaimFinancialSettings components have the suffix `claimFinancialSettings` and are stored in the `ClaimFinancialSettings` folder.

Version

ClaimFinancialSettings components are available in API version 57.0 and later.

Special Access Rules

To access this metadata type, you require access to either InsurancePolicyAdminAccess or InsuranceClaimMgmtAccess add-on license.

Fields

Field Name	Description
`claimCovPendingAuthStatus`	**Field Type** string **Description** Required. The status of pending financial authority for claim coverage.
`claimPendingAuthorityStatus`	**Field Type** string **Description** Required. The status of pending financial authority for claim.
`clmCovPymtDtlPendAuthSts`	**Field Type** string **Description** Required. The status of pending financial authority for claim coverage payment detail.
`masterLabel`	**Field Type** string **Description** Required.

Field Name	Description
	The unique label that identifies the claim financial settings throughout the Salesforce user interface.

Declarative Metadata Sample Definition

The following is an example of a ClaimFinancialSettings component.

```
<?xml version="1.0" encoding="UTF-8"?>
<ClaimFinancialSettings xmlns="http://soap.sforce.com/2006/04/metadata">
    <claimCovPendingAuthStatus>Pending Authority</claimCovPendingAuthStatus>
    <claimPendingAuthorityStatus>Pending Authority</claimPendingAuthorityStatus>
    <clmCovPymtDtlPendAuthSts>Pending Authority</clmCovPymtDtlPendAuthSts>
    <masterLabel>Claim Financial Settings</masterLabel>
</ClaimFinancialSettings>
```

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

```
<?xml version="1.0" encoding="UTF-8"?><!--
  ~ Copyright 2022 salesforce.com, inc.
  ~ All Rights Reserved
  ~ Company Confidential
  -->
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
    <types>
        <members>*</members>
        <name>ClaimFinancialSettings</name>
    </types>
    <version>57.0</version>
</Package>
```

Wildcard Support in the Manifest File

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

DocumentChecklistSettings

Represents an org's DocumentChecklistItem settings. This type extends the Metadata metadata type and inherits its `fullName` field.

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

File Suffix and Directory Location

DocumentChecklistSettings components are stored in the `DocumentChecklist.settings` file in the `settings` folder. The `.settings` files are different from other named components because there's only one settings file for each settings component.

Version

DocumentChecklistSettings components are available in API versions 55.0 and later.

Fields

Field Name	Field Type	Description
`dciCustomSharing`	boolean	Indicates whether the custom sharing rule for document checklist items is enabled for your org (`true`) or not (`false`). The default value is `false`.
`deleteDCIWithFiles`	boolean	Indicates whether deletion of document checklist items is enabled for your org (`true`) or not (`false`). The default value is `false`.

Declarative Metadata Sample Definition

The following is an example of a DocumentChecklistSettings.settings component.

```
<?xml version="1.0" encoding="UTF-8"?>
<DocumentChecklistSettings
 xmlns="http://soap.sforce.com/2006/04/metadata">
 <dciCustomSharing>true</dciCustomSharing>
 <deleteDCIWithFiles>true</deleteDCIWithFiles>
</DocumentChecklistSettings>
```

Example Package Manifest

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

```
<?xml version="1.0" encoding="UTF-8"?>
<Package
 xmlns="http://soap.sforce.com/2006/04/metadata">
 <types>
  <members>DocumentChecklist</members>
  <name>Settings</name>
 </types>
 <version>55.0</version>
</Package>
```

Wildcard Support in the Manifest File

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

Flow for Financial Services Cloud

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

Flow

Financial Services Cloud exposes additional FlowProcessType values on the Flow type in Metadata API.

Field Name	Field Type	Description
`processType`	FlowProcessType (enumeration of type string)	The type of the flow, as determined by the active version. Valid values added by Financial Services Cloud include: • `FSCLending`—A flow for Financial Services Cloud Mortgage. This value is available in API version 46.0 and later.

FlowActionCall

Financial Services Cloud exposes additional actionType values for the FlowActionCall Metadata type.

Field Name	Field Type	Description
`actionType`	hvocdeActionType(enumeration of type string)	Required. The action type. Additional valid values only for Financial Services Cloud include: • `createCaseForFeeReversal`—Creates a case to request a fee reversal for a client. This value is available in API version 62.0 and later. • `createFinancialRecords`—Creates person accounts, contacts, financial accounts, properties, assets, and liabilities from a residential loan application. This value is available in API version 49.0 and later. • `createIntegrationPlan`—Creates an integration plan record based on an object by using Expression Sets to make decisions and Dynamic Fulfillment Orchestration to create related object records. This value is available in API version 60.0 and later. • `getPicklistValues`—Get picklist values for the specified fields of an object. • `publishActionableOrchSrcEvent`—Publish an actionable orchestration source event by using the payload current value and API name of the source object from a data object data change event. • `runIntegrationPlan`—Triggers an integration plan using Dynamic Fulfillment Orchestration, which ensures each callout

Field Name	Field Type	Description
		happens at the right time by queuing it alongside its dependent steps. This value is available in API version 60.0 and later.

SEE ALSO:

Metadata API Developer Guide: Flow

Icon

Represents the mapping of custom icons to objects.This type extends the Metadata metadata type and inherits its `fullName` field.

File Suffix and Directory Location

Icon components have the suffix `.icon` and are stored in the `icons` folder.

Version

Icon components are available in API version 49.0 and later.

Special Access Rules

To use this metadata type, your Salesforce org must have the Health Cloud or Financial Services Cloud license.

Fields

Field Name	Field Type	Description
`image`	string	Required. The image file that is mapped to the object. Use the ContentAsset metadata type to hold the icon image referenced in the `image` field.
`key`	string	Required. A field value in the object. For example, with the `PersonLifeEvent`object, possible values for `key` can be `birthday`, `marriage`, `childbirth`, and so on.
`usageType`	IconUsageType (enumeration of type string)	Required. The object that is mapped to the image. Valid values are: • `PersonLifeEvent` • `InsurancePolicy` • `BusinessMilestone` • `AssetMilestone` • `FinancialAccountMilestone`

Declarative Metadata Sample Definition

The following is an example of an Icon component.

```
<?xml version="1.0" encoding="UTF-8"?>
<Icon xmlns="http://soap.sforce.com/2006/04/metadata">
    <usageType>PersonLifeEvent</usageType>
    <key>Birth</key>
    <image>image</image>
</Icon>
```

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

```
<?xml version="1.0" encoding="UTF-8"?>
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
    <types>
        <members>icons</members>
        <name>Icon</name>
    </types>
    <version>49.0</version>
</Package>
```

IndustriesSettings

Represents settings for Financial Services Cloud.This type extends the Metadata metadata type and inherits its `fullName` field.

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

File Suffix and Directory Location

IndustriesSettings are stored in a single file named `Industries.settings` in the `settings` directory.

Version

Industries settings are available in API version 47.0 and later.

Special Access Rules

Users need the FSC Insurance permission set to access the settings available in editions with Financial Services Cloud.

Fields for Financial Services Cloud

Field Name	Field Type	Description
`allowMultipleProducersToWorkOnSamePolicy`	boolean	Indicates whether multiple producers can be assigned to the same insurance policy. The default is `false`. This field is available in editions where Financial Services Cloud is enabled.

Field Name	Field Type	Description
`brwrCntctFrExtrnlSrcsPref`	boolean	Indicates whether borrower contact information can be sourced from external systems (`true`) or not (`false`). When enabled, this setting allows the system to retrieve and update borrower contact details from integrated external data sources. The default value is `false`.
`collectionAsaAgentPref`	boolean	Indicates whether the Collection as an Agent preference is enabled for your org (`true`) or not (`false`). This setting controls collection agent capabilities and workflows. The default value is `false`.
`clctnAndRecoveryAgntPref`	boolean	Indicates whether the Collections and Recovery Agent feature is enabled for your org (`true`) or not (`false`). When enabled, this feature allows users to manage debt collection processes and recovery workflows. The default value is `false`.
`createCustomerPropertyFromLAProperty`	boolean	When importing loan application data, indicates whether to create a customer property record from a loan application property record to represent the new home.
`createFinancialAccountFromLAAsset`	boolean	When importing loan application data, indicates whether to create financial account records from the assets listed in the loan application.
`createFinancialAccountFromLALiability`	boolean	When importing loan application data, indicates whether to create financial account records from the liabilities listed in the loan application.
`createFinancialAccountsFromLAFinancials`	boolean	When importing loan application data, indicates whether to create a financial account record that represents the mortgage loan.
`createFinancialAccountsFromLAProperty`	boolean	When importing loan application data, indicates whether to create a financial account record from the loan application property to represent the new home.
`createFSCAssetFromLAAsset`	boolean	When importing loan application data, indicates whether to create asset records from the assets listed in the loan application.
`createFSCAssetFromLAProperty`	boolean	When importing loan application data, indicates whether to create an asset record from a loan application property record to represent the new home that was acquired.
`createFSCLiabilityFromLAFinancial`	boolean	When importing loan application data, indicates whether to create a liability record from a loan application property record to represent the new mortgage loan.
`createFSCLiabilityFromLALiability`	boolean	When importing loan application data, indicates whether to create liability records from the liabilities listed in the loan application.
`enableAccessToMasterListOfCoverageTypes`	boolean	Indicates whether insurance agents can access the main list of coverage types. The default is `false`. This field is available in editions where Financial Services Cloud is enabled.
`enableAccountScoreEnabled`	boolean	Indicates whether Account Scoring is enabled for your org (`true`) or not (`false`). When enabled, this feature provides scoring and rating

Field Name	Field Type	Description
		capabilities for financial services accounts, helping relationship managers prioritize engagement and identify growth opportunities. The default value is `false`.
`enableB2B`	boolean	Indicates whether Business-to-Business (B2B) capabilities are enabled for Financial Services Cloud (`true`) or not (`false`). When enabled, this feature provides tools and data models for managing B2B financial services relationships, including business accounts, commercial lending, and corporate banking. The default value is `false`.
`enableB2BAccountPlan`	boolean	Indicates whether B2B Account Planning is enabled for your org (`true`) or not (`false`). This feature enables relationship managers to create and manage strategic account plans for business clients, including growth strategies, cross-sell opportunities, and relationship mapping. The default value is `false`.
`enableB2BEinstein`	boolean	Indicates whether Einstein AI features for B2B Financial Services are enabled for your org (`true`) or not (`false`). This feature provides AI-powered insights, recommendations, and predictive analytics for B2B financial services relationships. The default value is `false`.
`enableCallReportAdminContextPref`	boolean	Indicates whether admins can configure the Account Interactions component and use a component attribute to control whether end users can view data on the component with admin privileges (`true`) or not (`false`). The default is `false`.
`enableCalculationUsingParentPolicyOnly`	boolean	Indicates whether the policy premiums are calculated by using only the parent policy's premium (`true`) or not (`false`). Use this for hierarchical policies where premiums are stored at different levels. The default value is `false`.
`enableCollectionFLowOps`	boolean	Indicates whether Collection Flow Operations are enabled for your org (`true`) or not (`false`). When enabled, this feature provides automated workflows for managing collection processes, including dunning, payment plans, and recovery actions. The default value is `false`.
`enableCollectionRiskScoringCFE`	boolean	Indicates whether Collection Risk Scoring with Credit and Financial Engine is enabled for your org (`true`) or not (`false`). This feature enables AI-powered risk assessment for collection accounts to prioritize recovery efforts. The default value is `false`.
`enableCollectionTimeline`	boolean	Indicates whether the Collection Timeline feature is enabled for your org (`true`) or not (`false`). When enabled, users can view a chronological timeline of collection activities, communications, and payment history for accounts in collections. The default value is `false`. This field is available in editions where Financial Services Cloud is enabled.

Field Name	Field Type	Description
enableCompliantDataSharingForInteraction	boolean	Indicates whether compliant data sharing is enabled for the Interaction object (`true`) or not (`false`). The default value is `false`.
enableClaimMgmt	boolean	Indicates whether the recording and processing of the first loss notifications and managing claim participants, coverages, and settlements are enabled (`true`) or not (`false`). The default value is `false`.
enableCompliantDataSharingForAccount	boolean	Indicates whether the Compliant Data Sharing feature is enabled for the Account object. The default is `false`. This field is available in editions where Financial Services Cloud is enabled.
enableCompliantDataSharingForCustomObjects	boolean	Indicates whether the Compliant Data Sharing feature is enabled for custom objects (`true`) or not (`false`). The default value is `false`. This field is available in editions where Financial Services Cloud is enabled.
enableCompliantDataSharingForOpportunity	boolean	Indicates whether the Compliant Data Sharing feature is enabled for the Opportunity object (`true`) or not (`false`). The default value is `false`. This field is available in editions where Financial Services Cloud is enabled.
enableCompliantDataSharingForInteractionSummary	boolean	Indicates whether Compliant Data Sharing is enabled for the Interaction Summary object (`true`) or not (`false`). The default value is `false`.
enableDealManagement	boolean	Indicates whether the Financial Deal Management feature is enabled. The default is `false`. This field is available in editions where Financial Services Cloud is enabled.
enableDigitalLendingPref	boolean	Indicates whether Digital Lending capabilities are enabled for your org (`true`) or not (`false`). When enabled, this feature provides a comprehensive digital lending platform including online applications, automated underwriting, document management, and loan servicing capabilities. The default value is `false`.
enableDigitalLendingReadOnlyOrgPref	boolean	Indicates whether Digital Lending is enabled in read-only mode for your org (`true`) or not (`false`). When enabled, users can view Digital Lending data and reports but cannot create or modify loan applications or lending workflows. The default value is `false`.
enableDiscoveryFrameworkMetadata	boolean	Indicates whether the Assessment Question and Assessment Question Set features of the Discovery Framework Metadata are enabled (`true`) or not (`false`). The default value is `false`.
enableEinsteinDocReaderMappings	boolean	Indicates whether the Intelligent Form Reader Mappings feature is enabled. The default is `false`.
enableEnhancedQuestionCreation	boolean	Indicates whether the Enhanced Question Creation Experience feature of the Discovery Framework is enabled `true`) or not (`false`). The default value is `false`.

Field Name	Field Type	Description
enableFinancialAccountMgmt	boolean	Indicates whether the Financial Account Management Standard Objects setting is enabled for your org. The default is false. This field is available in editions where Financial Services Cloud is enabled.
enableFinancialDealRoleHierarchy	boolean	Indicates whether data sharing for the financial deals is configured to follow the role-based hierarchy (true) or not (false). The default value is false.
enableFinancialDealCallReportCmpPref	boolean	Indicates whether admins can use junction objects between the Financial Deal object and the Interaction and Interaction Summary objects within the Interaction Summary/Sharing component (true) or not (false). This field is available in API version 54.0 and later.
enableFinancialDealCallReportPref	boolean	Indicates whether the junction object is enabled between the Financial Deal object and the Interaction and Interaction Summary objects (true) or not (false). This field is available in API version 54.0 and later.
enableFSCInsuranceReport	boolean	Indicates whether sales managers can access the dashboard and prebuilt reports. The default is false. This field is available in API version 48.0 and later in editions where Financial Services Cloud is enabled. Note: This setting can be enabled only if the allowMultipleProducersToWorkOnSamePolicy setting is already set to true.
enableIndustriesAssessment	boolean	Indicates whether the Industries Assessment feature of the Discovery Framework is enabled true) or not (false). The default value is false.
enableIndustriesKYC	boolean	Indicates whether the Industries KYC (Know Your Customer) is enabled true) or not (false). The default value is false.
enableInteractionRoleHierarchy	boolean	Indicates whether role hierarchy-based sharing is available for interactions to users in the organization true) or not (false). The default value is false.
enableInteractionSummaryPref	boolean	Indicates whether the Interaction Summary setting is enabled for your org. The default is false. This field is available in editions where Financial Services Cloud is enabled.
enableInteractionSummaryRoleHierarchy	boolean	Indicates whether the Role-Hierarchy-Based Sharing for Interaction Summaries is enabled for your org. The default is false. This field is available in editions where Financial Services Cloud is enabled.
enableManyToManyRelationships	boolean	Indicates whether insurance can manage many-to-many relationships between claims and cases, claims and assets, and assets and policy participants. For example, if set to true, agents can handle multiple claims through one case or have multiple cases handling one claim.

Field Name	Field Type	Description
		The default is `false`. This field is available in editions where Financial Services Cloud is enabled.
`enableMortgageRlaTotalsOrgPref`	boolean	Indicates whether the calculation of assets and liabilities for residential loan application records is enabled for your org (true) or not (false). The default is `false`. This field is available in editions where Financial Services Cloud is enabled.
`enablePolicyAdministration`	boolean	Indicates whether the data model related to policy administrator is enabled `true`) or not (`false`). If this option is enabled, entities such as transactions and transaction details are available within the policy admin data model. The default value is `false`.
`enableRBLUsingCalcService`	boolean	Indicates whether Roll-by-Lookup (RBL) Using Calc Service is enabled for your org. The default is `false`. This field is available in editions where Financial Services Cloud is enabled.
`enableRecordRollup`	boolean	Indicates whether Record Rollup Optimization is enabled for your org. The default is `false`. This field is available in editions where Financial Services Cloud is enabled.
`enableReferralScoring`	boolean	Indicates whether Einstein Referral Scoring for Financial Services Cloud is enabled for your org (true) or not (false). The default is `false`. This field is available in editions where Financial Services Cloud is enabled.
`enableSlackForCib`	boolean	Indicates whether the access to Financial Services Cloud capabilities on Slack is enabled (`true`) or not (`false`). The default value is `false`.
`enableSyncInteractionsPref`	boolean	Indicates whether the Sync Interactions with Einstein Activity Capture setting is enabled (`true`) or not (`false`). The default value is `false`.
`enableTimelinePref`	boolean	Indicates whether the Timeline features are enabled for your organization (`true`) or not (`false`). The default value is `false`.
`enableWealthManagementAIPref`	boolean	Indicates whether AI features for Wealth Management are enabled for your org (`true`) or not (`false`). When enabled, this feature provides AI-powered capabilities for wealth management including portfolio analysis, investment recommendations, risk assessment, and client insights. The default value is `false`. This field is available in API version 63.0 and later.
`loanApplicantAddressAutoCreation`	boolean	Indicates whether automatic generation of loan applicant records for new residential loan applications that are associated with person accounts is enabled for your org. The default is `false`. This field is available in editions where Financial Services Cloud is enabled. Available in API version 51.0 and later.
`loanApplicantAutoCreation`	boolean	Indicates whether automatic generation of loan applicant address records for new residential loan applications that are associated with

Field Name	Field Type	Description
		person accounts is enabled for your org. The default is `false`. This field is available in editions where Financial Services Cloud is enabled. Available in API version 51.0 and later.
`rlaEditIfAccHasEdit`	boolean	Indicates whether a user can edit a residential loan application only if they have edit access on the account (`true`) or not (`false`). The default value is `false`.
`showCollectionContactAndAccount`	boolean	Indicates whether collection contact and account information is displayed in collection workflows (`true`) or not (`false`). This setting controls the visibility of contact and account details within the collections management interface. The default value is `false`.
`transformRBLtoDPE`	boolean	Indicates whether you can convert RBL rules into Data Processing Engine definitions for faster calculations. The default is `false`.

Declarative Metadata Sample Definition

The following is an example of a Industries.Settings metadata file.

```
<?xml version="1.0" encoding="UTF-8"?>
<IndustriesSettings xmlns="http://soap.sforce.com/2006/04/metadata">
    <allowMultipleProducersToWorkOnSamePolicy>true</allowMultipleProducersToWorkOnSamePolicy>

    <enableAccessToMasterListOfCoverageTypes>false</enableAccessToMasterListOfCoverageTypes>

     <enableBlockResourceAvailabilityOrgPref>true</enableBlockResourceAvailabilityOrgPref>

     <enableCompliantDataSharingForAccount>true</enableCompliantDataSharingForAccount>
     <enableEinsteinDocReader>true</enableEinsteinDocReader>
     <enableEventManagementOrgPref>true</enableEventManagementOrgPref>
     <enableFSCInsuranceReport>false</enableFSCInsuranceReport>
     <enableInteractionSummaryPref>true</enableInteractionSummaryPref>
     <enableInteractionSummaryRoleHierarchy>true</enableInteractionSummaryRoleHierarchy>
     <enableManyToManyRelationships>true</enableManyToManyRelationships>
     <enableMortgageRlaTotalsOrgPref>true</enableMortgageRlaTotalsOrgPref>
     <enableMultiResourceOrgPref>true</enableMultiResourceOrgPref>
     <enableOverbookingOrgPref>true</enableOverbookingOrgPref>
     <enableRBLUsingCalcService>true</enableRBLUsingCalcService>
     <enableRecordRollup>true</enableRecordRollup>
     <enableReferralScoring>true</enableReferralScoring>
     <loanApplicantAddressAutoCreation>true</loanApplicantAddressAutoCreation>
     <loanApplicantAutoCreation>true</loanApplicantAutoCreation>
</IndustriesSettings>
```

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

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

```
        <members>Industries</members>
        <name>Settings</name>
    </types>
    <version>47.0</version>
</Package>
```

OmniScript

Represents an OmniScript for the Discovery Framework, which guides users through sales, service, and other business processes. For Discovery Framework, the customization type is *discoveryframework*.

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

Parent Type

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

File Suffix and Directory Location

OmniScript components have the suffix `omniScript` and are stored in the `omniScripts` folder.

Version

OmniScript components are available in API version 56.0 and later.

Special Access Rules

To use this metadata type, you must have an Omnistudio license and the Discovery Framework feature enabled in your Salesforce org.

Fields

Field Name	Description
`assessmentDefinitionMetadata`	**Field Type** AssessmentDefinitionMetadata[] **Description** Metadata associated with an assessment definition. Available in API version 64.0 and later.
`customHtmlTemplates`	**Field Type** string **Description** The angular OmniScript template definitions.

Field Name	Description
`customJavaScript`	**Field Type** string **Description** The custom JavaScript used for an OmniScript.
`designerCustomizationType`	**Field Type** string **Description** The Omnistudio designer customization type.
`elementTypeComponentMapping`	**Field Type** string **Description** Overrides all elements of one type with a custom Lightning web component by mapping the element type to the Custom LWC.
`isActive`	**Field Type** boolean **Description** Indicates whether the OmniScript is active (`true`) or not (`false`). The default value is `false`.
`isIntegrationProcedure`	**Field Type** boolean **Description** Indicates whether OmniScript is an Integration Procedure (`true`) or OmniScript metadata (`false`). The default value is `false`.
`isManagedUsingStdDesigner`	**Field Type** boolean **Description** Indicates whether Omniscript is managed using standard designer (`true`) or not (`false`). Available in API version 64.0 and later.
`isMetadataCacheDisabled`	**Field Type** boolean **Description** Indicates whether metadata cache for the integration procedure is disabled (`true`) or not (`false`). The default value is `false`.
`isOmniScriptEmbeddable`	**Field Type** boolean

Field Name	Description
	Description Indicates whether the OmniScript can be embedded in other OmniScripts (`true`) or not (`false`). The default value is `false`
`isTestProcedure`	**Field Type** boolean **Description** Indicates whether OmniScript is a test procedure setting (`true`) or not (`false`). The default value is `false`
`isWebCompEnabled`	**Field Type** boolean **Description** Indicates whether web component OmniScript (not Angular) is enabled (`true`) or not (`false`). The default value is `false`
`language`	**Field Type** string **Description** Required. The language of the OmniScript.
`lastPreviewPage`	**Field Type** string **Description** The last page previewed in the OmniScript designer.
`name`	**Field Type** string **Description** Required. The name of the OmniScript.
`namespace`	**Field Type** string **Description** The namespace associated with this OmniScript record.
`omniAssessmentTasks`	**Field Type** OmniAssessmentTaskMetadata[]

Field Name	Description
	Description The omniAssessmentTasks associated with the OmniScript. Available in API version 63.0 and later. This field is available only if the Dynamic Assessment Access license is enabled.
`omniProcessElements`	**Field Type** OmniProcessElement[] **Description** The OmniProcessElements associated with the OmniScript.
`omniProcessKey`	**Field Type** string **Description** The integration procedure `Type_SubType` value.
`omniProcessType`	**Field Type** OmniProcessType (enumeration of type string) **Description** Required. Integration Procedure or OmniScript. Possible value is: • `OmniScript`
`overrideKey`	**Field Type** string **Description** Reserved for future use.
`propertySetConfig`	**Field Type** string **Description** The configuration information associated with the OmniScript.
`uniqueIndex`	**Field Type** string **Description** The developer name of the assessment question in the OmniScript. This field is relevant only for Omniscripts with `designerCustomizationType` as *`discoveryframework`*.
`requiredPermission`	**Field Type** string

Field Name	Description
	Description The required permissions to execute the integration procedure.
`responseCacheType`	**Field Type** string **Description** Response cache used for the integration procedure (session or Org).
`subType`	**Field Type** string **Description** Required. The OmniScript sub type value.
`type`	**Field Type** string **Description** Required. The OmniScript type value.
`uniqueName`	**Field Type** string **Description** Required. The unique name for the OmniScript as Type_SubType_Language_VersionNumber.
`versionNumber`	**Field Type** string **Description** Required. The OmniScript version number.
`webComponentKey`	**Field Type** string **Description** Internal unique key for the generated Lightning Web Components (LWC).

AssessmentDefinitionMetadata

Represents the metadata associated with the assessment definition.

Field Name	Description
approvalDateTime	**Field Type** dateTime **Description** The date and time when this version of the assessment definition was approved.
displayType	**Field Type** string **Description** The way this assessment is displayed in a user interface.
effectiveFromDate	**Field Type** dateTime **Description** The date and time from which the assessment definition becomes active and can be used.
effectiveToDate	**Field Type** dateTime **Description** The date and time until when this assessment definition is effective.
lastRevisedDateTime	**Field Type** dateTime **Description** The date and time when this assessment definition was last modified.
performerType	**Field Type** string **Description** The type of user, role, or system qualified or intended to complete the assessment.
purpose	**Field Type** string **Description** Reason for the assessment.

OmniAssessmentTaskMetadata

Represents the omni assessment tasks associated with the OmniScript.

Field Name	Description
`name`	**Field Type** string **Description** Required. The name of the omni assessment task.
`status`	**Field Type** picklist **Description** The status of the omni assessment task. Possible values are: • `Completed` • `InProgress`—In Progress • `IsDefined`—Is Defined • `NotStarted`—Not Started The default value is `IsDefined`.
`uniqueName`	**Field Type** string **Description** A unique name for the omni assessment task.

OmniProcessElement

Represents the OmniScript element associated with the OmniScript.

Field Name	Description
`childElements`	**Field Type** OmniProcessElement[] **Description** The child elements associated with the OmniProcessElement.
`description`	**Field Type** string **Description** The description of the OmniProcessElement.
`designerCustomizationType`	**Field Type** string

Field Name	Description
	Description The Omnistudio designer customization type. To create assessment questions using the Discovery Framework feature, use the customization type as *discoveryframework*.
discoveryFrameworkUsageType	**Field Type** string **Description** The usage type for industries that use the Discovery Framework. For example, the value for Health Cloud is HcUsageType. The value for no specific industry is Default.
embeddedOmniScriptKey	**Field Type** string **Description** The ID of the embedded OmniScript
isActive	**Field Type** boolean **Description** Indicates whether the status of the OmniProcessElement is active (true) or not (false).
isOmniScriptEmbeddable	**Field Type** boolean **Description** Indicates whether the OmniScript with the OmniProcessElement can be embedded in other OmniScripts (true) or not (false).
level	**Field Type** double **Description** The vertical level in which the OmniProcessElement occurs on the OmniScript.
name	**Field Type** string **Description** Required. The name of the OmniProcessElement.
omniProcessVersionNumber	**Field Type** double

Field Name	Description
	Description The related OmniProcess version.
`parentElementName`	**Field Type** string **Description** The name of the parent OmniProcessElement.
`parentElementType`	**Field Type** string **Description** The type of the parent OmniProcessElement.
`propertySetConfig`	**Field Type** textarea **Description** The property set of the OmniProcessElement.
`sequenceNumber`	**Field Type** double **Description** The horizontal level in which the OmniProcessElement occurs on the OmniScript.
`type`	**Field Type** string **Description** The OmniProcessElement type. For example, `Text` and `TextArea`.
`uniqueIndex`	**Field Type** string **Description** The developer name of the assessment question in the OmniScript. This field is relevant only for Omniscripts with `designerCustomizationType` as *`discoveryframework`*.

Declarative Metadata Sample Definition

Here's an example of an Omniscript component.

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

```
 <designerCustomizationType>Discovery Framework</designerCustomizationType>
 <discoveryFrameworkUsageType>0</discoveryFrameworkUsageType>

<elementTypeComponentMapping>{&quot;ElementTypeToHTMLTemplateList&quot;:[]}</elementTypeComponentMapping>

 <isActive>false</isActive>
 <isIntegrationProcedure>false</isIntegrationProcedure>
 <isManagedUsingStdDesigner>false</isManagedUsingStdDesigner>
 <isMetadataCacheDisabled>false</isMetadataCacheDisabled>
 <isOmniScriptEmbeddable>false</isOmniScriptEmbeddable>
 <isTestProcedure>false</isTestProcedure>
 <isWebCompEnabled>true</isWebCompEnabled>
 <language>English</language>
 <name>Base Discovery Framework</name>
 <omniProcessElements>
  <discoveryFrameworkUsageType>0</discoveryFrameworkUsageType>
  <isActive>true</isActive>
  <isOmniScriptEmbeddable>false</isOmniScriptEmbeddable>
  <level>0.0</level>
  <name>Save-Responses</name>
  <omniProcessVersionNumber>0.0</omniProcessVersionNumber>

 Progress&quot;,&quot;postMessage&quot;:&quot;Submitted
 Back&quot;,&quot;failureAbortMessage&quot;:&quot;Are you

  <sequenceNumber>1.0</sequenceNumber>
  <type>Remote Action</type>
 </omniProcessElements>
 <omniProcessElements>
  <childElements>
   <designerCustomizationType>Discovery Framework</designerCustomizationType>
   <discoveryFrameworkUsageType>0</discoveryFrameworkUsageType>
   <isActive>true</isActive>
   <isOmniScriptEmbeddable>false</isOmniScriptEmbeddable>
   <level>1.0</level>
   <name>Age</name>
   <omniProcessVersionNumber>0.0</omniProcessVersionNumber>
   <propertySetConfig>{&quot;controlWidth&quot;:12.0,&quot;label&quot;:&quot;Age
 if

   <sequenceNumber>2.0</sequenceNumber>
   <type>Number</type>
   <uniqueIndex>Age</uniqueIndex>
  </childElements>
  <childElements>
   <designerCustomizationType>Discovery Framework</designerCustomizationType>
   <discoveryFrameworkUsageType>0</discoveryFrameworkUsageType>
   <isActive>true</isActive>
   <isOmniScriptEmbeddable>false</isOmniScriptEmbeddable>
```

```
    <level>1.0</level>
    <name>First_Name</name>
    <omniProcessVersionNumber>0.0</omniProcessVersionNumber>
    <propertySetConfig>{&quot;controlWidth&quot;:12.0,&quot;label&quot;:&quot;First
 if
False&quot;,&quot;accessibleFutureSteps&quot;:false,&quot;doneValue&quot;:0.0,&quot;HTMLTemplateId&quot;:&quot;&quot;,&quot;hide&quot;:false,&quot;disOrder&quot;:false}</propertySetConfig>

    <sequenceNumber>0.0</sequenceNumber>
    <type>Text</type>
    <uniqueIndex>First_Name</uniqueIndex>
   </childElements>
   <childElements>
    <designerCustomizationType>Discovery Framework</designerCustomizationType>
    <discoveryFrameworkUsageType>0</discoveryFrameworkUsageType>
    <isActive>true</isActive>
    <isOmniScriptEmbeddable>false</isOmniScriptEmbeddable>
    <level>1.0</level>
    <name>Last_Name</name>
    <omniProcessVersionNumber>0.0</omniProcessVersionNumber>
    <propertySetConfig>{&quot;controlWidth&quot;:12.0,&quot;label&quot;:&quot;Last
 if
False&quot;,&quot;accessibleFutureSteps&quot;:false,&quot;doneValue&quot;:0.0,&quot;HTMLTemplateId&quot;:&quot;&quot;,&quot;hide&quot;:false,&quot;disOrder&quot;:false}</propertySetConfig>

    <sequenceNumber>1.0</sequenceNumber>
    <type>Text</type>
    <uniqueIndex>Last_Name</uniqueIndex>
   </childElements>
   <designerCustomizationType>Discovery Framework</designerCustomizationType>
   <discoveryFrameworkUsageType>0</discoveryFrameworkUsageType>
   <isActive>true</isActive>
   <isOmniScriptEmbeddable>false</isOmniScriptEmbeddable>
   <level>0.0</level>
   <name>Step1</name>
   <omniProcessVersionNumber>0.0</omniProcessVersionNumber>
   <propertySetConfig>{&quot;label&quot;:&quot;Base Discovery
 you
sure?&quot;,&quot;saveLabel&quot;:&quot;&quot;,&quot;saveMessage&quot;:&quot;&quot;,&quot;completeLabel&quot;:&quot;Complete&quot;,&quot;completeMessage&quot;:&quot;Are
 you sure you want to complete the
 if

   <sequenceNumber>0.0</sequenceNumber>
   <type>Step</type>
  </omniProcessElements>
  <omniProcessType>OmniScript</omniProcessType>

  <subType>Framework</subType>
  <type>Discovery</type>
```

```
 <uniqueName>Discovery_Framework_English_1</uniqueName>
 <versionNumber>1.0</versionNumber>
</OmniScript>
```

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

```
<?xml version="1.0" encoding="UTF-8"?>
<Package
    xmlns="http://soap.sforce.com/2006/04/metadata">
    <types>
        <members>*</members>
        <name>OmniScript</name>
    </types>
    <version>63.0</version>
</Package>
```

Wildcard Support in the Manifest File

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

Usage Type

Before you retrieve or deploy Discovery Framework OmniScripts, we recommend that you review these considerations.

- If the `DesignerCustomizationType` of the OmniScript is `discoveryframework`, then the questions in the OmniScript must be within the *<uniqueIndex>* tag in the metadata definition file.
- When deploying the OmniScript of type Discovery Framework, enable Discovery Framework Metadata Enabled setting.
- OmniScripts of type Discovery Framework don't support IDX Workbench.
- If any question associated with the OmniScript doesn't exist in the target org or, if the active version of that question doesn't exist in the target org, then deploying the OmniScript fails.

ParticipantRole

Represents details, such as the name and associated default access level, for a role that a participant can have in the context of a parent record.

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

Parent Type

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

File Suffix and Directory Location

`ParticipantRole` components have the suffix `.participantRole` and are stored in the `participantRoles` folder.

Version

ParticipantRole components are available in API version 50.0 and later.

Fields

Field Name	Description
`defaultAccessLevel`	**Field Type** picklist **Description** Required. The default sharing access granted to the participant role. Valid values are: • `Edit`—Read/Write • `None` • `Read`—Read Only
`isActive`	**Field Type** boolean **Description** Indicates whether the participant role is activated.
`masterLabel`	**Field Type** string **Description** Required. The name for the participant role.
`parentObject`	**Field Type** string **Description** Required. The parent object for the participant role. Valid values are: • `Account` • `Budget` Available in API version 59.0 and later. • `IndividualApplication` Available in API version 59.0 and later. • `Interaction` Available in API version 52.0 and later. • `InteractionSummary` Available in API version 51.0 and later.

Field Name	Description
	• `FinancialDeal` Available in API version 52.0 and later. • `FundingAward` Available in API version 59.0 and later. • `FundingOpportunity` • `Opportunity` • `Team` Available in API version 58.0 and later. • Custom objects

Declarative Metadata Sample Definition

The following is an example of a ParticipantRole component.

```
<?xml version="1.0" encoding="UTF-8"?>
<ParticipantRole xmlns="http://soap.sforce.com/2006/04/metadata">
    <defaultAccessLevel>Read</defaultAccessLevel>
    <isActive>true</isActive>
    <masterLabel>Advisor</masterLabel>
    <parentObject>Account</parentObject>
</ParticipantRole>
```

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

```
<?xml version="1.0" encoding="UTF-8"?>
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
    <types>
        <members>*</members>
        <name>ParticipantRole</name>
    </types>
    <version>50.0</version>
</Package>
```

Wildcard Support in the Manifest File

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

RelatedRecordAssocCriteria

Represents criteria for automatically linking records like accounts, leads, opportunities, and cases with the branches that work with them.

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

Parent Type

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

File Suffix and Directory Location

RelatedRecordAssocCriteria components have the suffix `.relatedRecordAssocCriteria` and are stored in the `relatedRecordAssocCriteria` folder.

Version

RelatedRecordAssocCriteria components are available in API version 52.0 and later.

Special Access Rules

To use this object, you must have the Financial Services Cloud Extension permission set.

Fields

Field Name	Description
`associationHandlerApexClass`	**Field Type** string **Description** The name of a custom Apex class that handles the creation of association records for specific association criteria. This class must: • Apply to an object that the Record Association Builder doesn't directly support • Implement the `fscwmgen.BranchManagement AssociationHandler` interface • Return a list of Branch Unit Related Records • Populate at least the minimum required fields in each Branch Unit Related Record: – `BranchUnitId`: Represents the current branch unit of the user or contact – `BusinessUnitMemberId`: The Banker ID of the user or contact – `RelatedRecordId`: The ID of the custom object to be related This field is a relationship field.
`associationType`	**Field Type** AssociationType (enumeration of type string) **Description** Required. The association type. Values are: • `BranchManagement`

Field Name	Description
`description`	**Field Type** string **Description** A description of the association criteria.
`eventType`	**Field Type** AssociationEventType (enumeration of type string) **Description** Required. The type of reference object event that triggers creation of the association. Values are: • `Create` • `Update`
`isProtected`	**Field Type** boolean **Description** An auto-generated value that doesn't impact the behavior of the metadata type. The default value is `false`.
`masterLabel`	**Field Type** string **Description** Required. The master label of the association criteria. This internal label doesn't get translated.
`preCondition`	**Field Type** string **Description** Required. A formula that, when true, causes a new association to be created.
`referenceObject`	**Field Type** string **Description** Required. The reference object for the association criteria.
`selectedOwnerField`	**Field Type** string

Field Name	Description
	Description A field to use instead of the default Owner ID.
`status`	**Field Type** AssociationStatusType (enumeration of type string) **Description** Required. The status of the association criteria. Values are: • `Active` • `Draft` • `Inactive`

Declarative Metadata Sample Definition

The following is an example of a RelatedRecordAssocCriteria component.

```
<?xml version="1.0" encoding="UTF-8"?>
<RelatedRecordAssocCriteria xmlns="http://soap.sforce.com/2006/04/metadata">
   <associationType>BranchManagement</associationType>
   <eventType>Create</eventType>
   <masterLabel>RevenueThreeMillion</masterLabel>
   <preCondition>[Account].AnnualRevenue > 3000000</preCondition>
   <referenceObject>Account</referenceObject>
   <status>Active</status>
</RelatedRecordAssocCriteria>
```

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

```
<?xml version="1.0" encoding="UTF-8"?>
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
    <types>
        <members>*</members>
        <name>RelatedRecordAssocCriteria</name>
    </types>
    <version>52.0</version>
</Package>
```

Wildcard Support in the Manifest File

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

RelationshipGraphDefinition

Represents a definition of a graph that you can configure in your organization to traverse object hierarchies and record details, giving you a glimpse of how your business works.

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

Parent Type

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

File Suffix and Directory Location

RelationshipGraphDefinition components have the suffix `.relationshipGraphDefinition` and are stored in the `relationshipGraphDefinitions` folder.

Version

RelationshipGraphDefinition components are available in API version 55.0 and later.

Special Access Rules

The Financial Services Cloud permission set license is required to access this object.

Fields

Field Name	Description
`isActive`	**Field Type** boolean **Description** Required. Indicates whether the relationship graph is available for use (`true`) or not (`false`). The default value is `true`. Note: This field is read-only in API version 55.0.
`isTemplate`	**Field Type** boolean **Description** Required. Indicates whether you can configure this relationship graph as a template (`true` or not `false`). The default value is `false`. In the UI, this field is *Set as Template*.

Field Name	Description
masterLabel	**Field Type** string **Description** Required. A user-friendly name for RelationshipGraphDefinition, which is defined when the RelationshipGraphDefinition is created. In the UI, this field is *Label*.
relationshipGraphDefVersions	**Field Type** RelationshipGraphDefVersion[] **Description** Represents a list of graph versions associated with the relationship graph definition.

RelationshipGraphDefVersion

The list of graph versions associated with the relationship graph definition.

Field Name	Description
graphDefinition	**Field Type** string **Description** Required. Specifies a set of properties required to create a relationship graph, such as parent node, child relationships, filter and sort fields, and graph UI elements.
graphType	**Field Type** string **Description** Required. Specifies the type of graph. In API version 55.0, only `HorizontalHierarchy` graph type is supported.

Declarative Metadata Sample Definition

The following is an example of a RelationshipGraphDefinition component.

```
<?xml version="1.0" encoding="UTF-8"?>
<RelationshipGraphDefinition xmlns="http://soap.sforce.com/2006/04/metadata">
     <isActive>false</isActive>
     <isTemplate>true</isTemplate>
     <masterLabel>Account Graph</masterLabel>
```

```
    <relationshipGraphDefVersions>
        <graphDefinition>{
  "graph" : {
    "rootNode" : {
      "object" : {
        "entity" : "Account"
      },
      "configurationType" : "Primary",
      "sortFields" : [ {
        "field" : {
          "field" : "LastModifiedDate",
          "whichEntity" : "TARGET"
        },
        "order" : "DESC"
      } ],
      "nodeUiConfig" : {
        "fieldsToDisplay" : [ ],
        "showFieldLabels" : true,
        "actions" : { }
      },
      "childRelationships" : [ {
        "OneToMany" : {
          "targetObjectNode" : {
            "object" : {
              "entity" : "Contact"
            },
            "configurationType" :"Custom",
            "sortFields" : [ {
              "field" : {
                "field" : "LastModifiedDate",
                "whichEntity" : "TARGET"
              },
              "order" : "DESC"
            } ],
            "nodeUiConfig" : {
              "fieldsToDisplay" : [ {
                "field" : "Name",
                "whichEntity" : "TARGET"
              }, {
                "field" : "Phone",
                "whichEntity" :"TARGET"
              } ],
              "showFieldLabels" : true,
              "actions" : {
                "containerActions" : [ {
                  "action" : "New"
                } ],
                "recordActions" : [ {
                  "action" : "Edit"
                }, {
                  "action" : "Delete"
                } ]
              }
            },
```

```
            "childRelationships" : [ ]
          },
          "relationshipUiConfig" : { },
          "filter" : {
            "filterCriteria" : [ {
              "field" : {
                "field" : "Name",
                "whichEntity" : "TARGET"
              },
              "operator" : "eq",
              "value" : "Salesforce"
            } ],
            "booleanFilter" : "1"
          },
          "targetObjectField" : {
            "field" : "AccountId",
            "whichEntity" : "TARGET"
          }
        }
      } ]
    },
    "globalUiConfig" : {
      "borderColor" : "Green2",
      "borderThickness" : "2px";,
      "colorShading" : "Black",
      "fieldLayout" : "Vertically Stacked",
      "recordContainerExpansion" : true,
      "recordExpansion" : true
    }
  }
 }</graphDefinition>
        <graphType>HorizontalHierarchy</graphType>
    </relationshipGraphDefVersions>
</RelationshipGraphDefinition>
```

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

```
<?xml version="1.0" encoding="UTF-8"?>
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
   <fullName>Package1</fullName>
   <types>
       <members>*</members>
       <name>RelationshipGraphDefinition</name>
   </types>
   <version>55.0</version>
</Package>
```

Wildcard Support in the Manifest File

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

RetrievalSummaryDefinition

Represents a metadata type that stores the header information of a retrieval definition. It enables the configuration of data retrieval patterns for summarizing related records across object relationships.

Parent Type

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

File Suffix and Directory Location

RetrievalSummaryDefinition components have the suffix `.retrievalSummaryDefinition` and are stored in the `.retrievalSummaryDefinitions` folder.

Version

RetrievalSummaryDefinition components are available in API version 61.0 and later. Individual fields may have specific minimum API version requirements as mentioned in the field descriptions.

Fields

Field Name	Description
`masterLabel`	**Field Type** string **Description** Required. A user-friendly name when RetrievalSummaryDefinition is created.
`retrievalSummaryDefFields`	**Field Type** RetrievalSummaryDefField[] **Description** Collection of fields to retrieve from the root object of the retrieval definition. Each field definition specifies which field from the target object should be included in the retrieval and the order in which it should be processed.
`retrievalSummaryDefObjects`	**Field Type** RetrievalSummaryDefObject[] **Description** Collection of rollup definitions that aggregate data from related objects. Each object definition specifies a related object, the aggregation logic to apply, and the fields to retrieve from that object. This enables hierarchical data aggregation across object relationships.

Field Name	Description
`rootObject`	**Field Type** string **Description** Required. API name of the primary object that serves as the starting point for the retrieval definition. This object serves as the anchor point for all retrieval and rollup operations defined in this metadata. The value must be a valid Salesforce object API name.

RetrievalSummaryDefField

Represents a field definition that specifies a single field to retrieve from a target object. Each field definition includes the field API name and a sequence number that determines the processing order.

Field Name	Description
`field`	**Field Type** string **Description** Required. API name of the field to retrieve from the target object. This must be a valid field API name on the specified object.
`sequenceNumber`	**Field Type** int **Description** Required. Processing order of the field in the retrieval operation. Fields are processed in ascending sequence number order. This allows you to control the order in which fields are displayed.

RetrievalSummaryDefObject

Represents a rollup definition that aggregates data from a related object. Each rollup definition specifies the aggregation logic, the fields to retrieve, and the processing order for summarizing data across object relationships.

Field Name	Description
`recordAggregationDefinition`	**Field Type** string

Field Name	Description
	Description Required. Reference to the aggregation definition that specifies how data from the related object must be aggregated. This parameter references a RecordAggregationDefinition.
`retrievalSummaryDefFields`	**Field Type** RetrievalSummaryDefField[] **Description** Collection of fields to retrieve from this related object. Each field definition specifies which field should be included and in what order. This is an optional array that allows you to specify additional fields beyond those defined in the aggregation definition.
`sequenceNumber`	**Field Type** int **Description** Required. Processing order of the rollup operation. Rollups are processed in ascending sequence number order, allowing you to control the hierarchy of data aggregation when multiple related objects are involved.

Usage

RetrievalSummaryDefinition is commonly used in Financial Services Cloud to define patterns for retrieving and summarizing data across related objects. Typical use cases include:

- Rollup Summarization: Aggregate data from child records to parent records, such as summing transaction amounts or counting related activities.
- Hierarchical Data Aggregation: Retrieve and summarize data across multiple levels of object relationships, enabling complex reporting and analytics.
- Data Consolidation: Combine information from multiple related objects into a single summary view for easier analysis and decision-making.
- Performance Optimization: Pre-define retrieval patterns to improve query performance when accessing related data across multiple objects.

Declarative Metadata Sample Definition

The following is an example of a RetrievalSummaryDefinition component that retrieves data from an Account object and includes a rollup from related Opportunity records.

```
<?xml version="1.0" encoding="UTF-8"?>
<RetrievalSummaryDefinition xmlns="http://soap.sforce.com/2006/04/metadata">
   <masterLabel>Account Revenue Summary</masterLabel>
   <rootObject>Account</rootObject>
```

```
   <retrievalSummaryDefFields>
      <field>Name</field>
      <sequenceNumber>1</sequenceNumber>
   </retrievalSummaryDefFields>
   <retrievalSummaryDefFields>
      <field>Industry</field>
      <sequenceNumber>2</sequenceNumber>
   </retrievalSummaryDefFields>
   <retrievalSummaryDefObjects>
      <recordAggregationDefinition>OpportunityRevenueRollup</recordAggregationDefinition>

      <sequenceNumber>1</sequenceNumber>
      <retrievalSummaryDefFields>
         <field>Amount</field>
         <sequenceNumber>1</sequenceNumber>
      </retrievalSummaryDefFields>
      <retrievalSummaryDefFields>
         <field>CloseDate</field>
         <sequenceNumber>2</sequenceNumber>
      </retrievalSummaryDefFields>
   </retrievalSummaryDefObjects>
</RetrievalSummaryDefinition>
```

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

```
<?xml version="1.0" encoding="UTF-8"?>
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
    <types>
        <members>*</members>
        <name>RetrievalSummaryDefinition</name>
    </types>
    <version>61.0</version>
</Package>
```

Wildcard Support in the Manifest File

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

FINANCIAL SERVICES CLOUD STANDARD INVOCABLE ACTIONS

Create related records for a residential loan application, get an assessment response summary, or create and run integration plans. For more information on standard invocable actions, see **REST API Developer Guide** and **Actions Developer Guide**.

Create Financial Records Actions

Creates person accounts, contacts, financial accounts, properties, assets, and liabilities from a residential loan application.

This object is available in API version 49.0 and later for users with a Financial Services Cloud license.

Supported REST HTTP Methods

URI

`/services/data/v`***`XX.X`***`/actions/standard/createFinancialRecords`

Formats

JSON, XML

HTTP Methods

GET, HEAD, POST

Authentication

`Authorization: Bearer` ***`token`***

Inputs

Input	Details
`recordId`	**Type** ID **Description** ID of the residential loan application.

Outputs

Input	Details
`status`	**Type** string **Description** Whether the creation process succeeded, partially succeeded, or failed.

Input	Details
customerPropertiesIdList	**Type** string **Description** List of IDs created for CustomerProperty records.
assetsAndLiabilitiesIdList	**Type** string **Description** List of IDs created for AssetsAndLiabilities records.
financialAccountsIdList	**Type** string **Description** List of IDs created for FinancialAccount records.
personAccountsIdList	**Type** string **Description** List of IDs created for PersonAccount records.
errors	**Type** string **Description** List of errors that occurred during the creation process.

Example

JSON Request Body

```
{
  "recordId" : "0cdB0000000CbVGIA0"
}
```

JSON Response Body

```
{
    "customerPropertiesIdList" : [ "0b8B0000000GnjdIAC" ],
    "assetsAndLiabilitiesIdList" : [ "a03B000000735LrIAI", "a03B000000735LsIAI",
"a03B000000735LtIAI" ],
    "personAccountsIdList" : [ "001B000001K8Zx5IAF" ],
    "errors" : [ ],
    "status" : "SUCCESS",
    "financialAccountsIdList" : [ "a0EB000000227WoMAI", "a0EB000000227WpMAI",
"a0EB000000227WqMAI" ]
  }
```

Create Integration Plan

Creates an integration plan record based on an object by using Expression Sets to make decisions and Dynamic Fulfillment Orchestration to create related object records.

This action is available in API version 60.0 and later for users with a Financial Services Cloud license.

Supported REST HTTP Methods

URI

`/services/data/v`***`XX.X`***`/actions/standard/createIntegrationPlan`

Formats

JSON

HTTP Methods

POST

Authentication

`Authorization: Bearer` ***`token`***

Inputs

Input	Details
`contextDefinitionName`	**Type** string **Description** Required Name of the Context Definition record to build the context data for. Available in API version 61.0 and later.
`contextMappingName`	**Type** string **Description** Required Name of the Context Mapping record used to build the context. Available in API version 61.0 and later.
`isTaggedData`	**Type** boolean **Description** Indicates if the key in the data is a tagged key (`true`) or not (`false`). The default value is `false`. Available in API version 61.0 and later.
`contextData`	**Type** string

Input	Details
	Description JSON data of the context data record. Available in API version 61.0 and later.
`expressionSetName`	**Type** string **Description** API name of the expression set that identifies eligible integrations and their dependencies.
`anchorRecordId`	**Type** ID **Description** ID of the record that supplies any expression set input parameters missing from contextId.

Outputs

Input	Details
`integrationPlanId`	**Type** **ID** **Description** ID of the integration plan, which includes each callout step and step dependency.

Example

This example shows a sample input for the Create Integration Plan action.

```
{
  "inputs": [
    {
      "contextDefinitionName": "Home Loan Application Context",
      "contextMappingName": "Home Loan Application Context Mapping",
      "isTaggedData": false,
      "contextData": {"{\"businessObjectType\": \"Application
Form\",\"id\":\"13XSM0000000TjZxxU\"}"},
      "expressionSetName": "HomeLoanIntegrationsES",
      "anchorRecordId": "13XSM0000000TjZxxU"
    }
  ]
}
```

This example shows a sample output for the Create Integration Plan action.

```
{
  "actionName": "createIntegrationPlan",
  "errors": null,
```

```
  "isSuccess": true,
  "outputValues": {
    "integrationPlanId": "13VSB000000IsYD2A0"
  },
  "version": 1
}
```

Get Assessment Response Summary

Get Assessment Response Summary makes it easy to use a flow to trigger server-side document generation using Document Generation.

In the Discovery Framework, the responses from an assessment are stored in the AssessmentQuestionResponse object and the form metadata stays in the OmniScript. You can use this invocable action to pass assessment summary data to downstream processes. This invocable action provides summary JSON code that can be consumed in Document Generation workflows to generate documents.

The Get Assessment Response Summary invocable action takes an assessment ID as input to get the OmniScript (OmniProcess) ID, which is used to retrieve the OmniScript. The assessment ID also retrieves the assessment response and merges the response with the OmniScript to create an assessment summary response in the summary JSON code.

This object is available in API version 56.0 and later.

Supported REST HTTP Methods

URI

`/services/data/v56.0/actions/standard/getAssessmentResponseSummary`

Formats

JSON

HTTP Methods

POST

Authentication

`Authorization: Bearer token`

Inputs

Input	Details
`assessmentId`	**Type** ID **Description** Required. The ID of the assessment record for which to summarize responses.

Outputs

Output	Details
assessmentResponseSummary	**Type** string **Description** A JSON string containing the summary assessment question texts and responses for the specified assessment record. The response summary structure follows the structure of the OmniScript.

Usage

Sample Input

When exposing the Get Assessment Response Summary invocable action in a REST API, you can use the following format to pass input, which includes the assessmentId and its value.

```
{
  "inputs" : [ {"assessmentId" : "0U3RO00000005FN0AY"} ]
}
```

Sample Output

In this example, the first line indicates the OmniScript type, subtype, and language. For each step, there are multiple questions that appear in the OmniScript. You can use this information in a downstream process, such as PDF file rendering using Document Generation.

```
  "KYC_Individual_English": {
    "Step1": {
      "label": "Identity Details",
      "value": {
        "LC_Survey_Question_2": {
          "label": "Full Name",
          "value": "Joe Smith"
        },
        "DateofBirth_m": {
          "label": "Date of Birth",
          "value": "Thu Jul 27 00:00:00 GMT 2000"
        },
        "Gender_m": {
          "label": "Gender",
          "value": "Female"
        },
        "EmailAddress_m": {
          "label": "Email Address",
          "value": "Joe.Smith@company.com"
        },
        "PAN": {
          "label": "PAN",
          "value": "QWEASDZXC"
        }
      }
```

```
    },
    "Step2": {
      "label": "Address Details",
      "value": {
        "Address_CorrespondenceAdd_Corporate": {
          "label": "Address of Correspondence",
          "value": "100 Some St, San Francisco, CA 12345, United States"
        },
        "Address_ContactDetails_Corporate": {
          "label": "Telephone/Mobile",
          "value": "1616111233"
        },
        "Alternate_Contact": {
          "label": "Alternate Mobile Number",
          "value": "1911212123"
        }
      }
    },
    "Step3": {
      "label": "Account Declaration",
      "value": {
        "Account_declaration": {
          "label": "I declare that I have following deposit accounts with your/
other bank's branches :",
          "value": [
            {
              "Bank": {
                "label": "Bank",
                "value": "Acme1"
              },
              "Branch": {
                "label": "Branch",
                "value": "Mission St"
              },
              "Type_of_Account": {
                "label": "Type of Account",
                "value": "Checking"
              },
              "Account_Number": {
                "label": "Account Number",
                "value": "12345678"
              }
            },
            {
              "Bank": {
                "label": "Bank",
                "value": "Acme2"
              },
              "Branch": {
                "label": "Branch",
                "value": "Mission St"
              },
              "Type_of_Account": {
                "label": "Type of Account",
```

```
                "value": "Savings"
              },
              "Account_Number": {
                "label": "Account Number",
                "value": "1234567890"
              }
            }
          ]
        }
      }
    },
    "Step4": {
      "label": "Declaration",
      "value": {
        "Declaration_m": {
          "label": "The customer declares and certifies that the information in this
form is true and correct. Any pre-filled sections of this form must be reviewed prior
 to signing and submitting, to ensure the information accurately conveys the new
account details.",
          "value": "true"
        }
      }
    }
  }
}
```


Get Picklist Values Action

Get picklist values for the specified fields of an object.

This action is available in API version 65.0 and later.

Supported REST HTTP Methods

URI

`/services/data/v65.0/actions/standard/getPicklistValues`

Formats

JSON, XML

HTTP Methods

POST

Authentication

`Authorization: Bearer`***`token`***

Inputs

Input	Details
`inputData`	**Type** string **Description** Required. JSON structure that contains objects and field names for which the picklist values must be retrieved. You can also specify a record type ID.

Outputs

Output	Details
`outputData`	**Type** string **Description** Picklist values for the specified objects and fields.

Example

POST

This sample request is for the Get Picklist Values action.

```
{
  "inputs": {
    "inputData": [
      {
        "objectName": "FinancialPlan",
        "recordTypeId": "",
        "fields": [
          "Status",
          "Type",
          "InvalidField",
          "CustomStatus__c"
        ]
      },
      {
        "objectName": "ApplicationTest__c",
        "recordTypeId": "012xx00000068A8AAI",
        "fields": [
          "status__c"
        ]
      },
      {
```

```
        "objectName": "ApplicationTest__c",
        "fields": [
          "status__c"
        ]
      }
    ]
  }
}
```

This sample response is for the Get Picklist Values action.

```
{
  "actionName": "createIntegrationPlan",
  "isSuccess": true,
  "outputValues": {
    "outputData": [
      {
        "objectName": "FinancialPlan",
        "fieldMetadata": [
          {
            "fieldName": "Status",
            "picklistValues": [
              {
                "apiName": "Completed",
                "label": "Completed"
              },
              {
                "apiName": "InProgress",
                "label": "In Progress"
              },
              {
                "apiName": "NotStarted",
                "label": "Not Started"
              }
            ]
          },
          {
            "fieldName": "Type",
            "picklistValues": [
              {
                "apiName": "Education",
                "label": "Education"
              },
              {
                "apiName": "Other",
                "label": "Other"
              },
              {
                "apiName": "Retirement",
                "label": "Retirement"
              }
            ]
          },
          {
            "fieldName": "InvalidField",
```

```
            "errorMessage": "Unable to retrieve picklist values. Please verify object
and field name are valid. Error ID: 1375398684-2405 (467112832)."
          },
          {
            "fieldName": "CustomStatus__c",
            "picklistValues": [
              {
                "apiName": "Inprogress",
                "label": "Inprogress"
              },
              {
                "apiName": "Pending",
                "label": "Pending"
              }
            ]
          }
        ]
      },
      {
        "objectName": "ApplicationTest__c",
        "fieldMetadata": [
          {
            "fieldName": "status__c",
            "picklistValues": [
              {
                "apiName": "completed",
                "label": "completed"
              },
              {
                "apiName": "Inprogress",
                "label": "Inprogress"
              },
              {
                "apiName": "processing",
                "label": "processing"
              }
            ]
          }
        ]
      },
      {
        "objectName": "ApplicationTest__c",
        "fieldMetadata": [
          {
            "fieldName": "status__c",
            "picklistValues": [
              {
                "apiName": "completed",
                "label": "completed"
              },
              {
                "apiName": "Inprogress",
                "label": "Inprogress"
              },
```

```
              {
                "apiName": "pending",
                "label": "pending"
              },
              {
                "apiName": "processing",
                "label": "processing"
              }
            ]
          }
        ]
      }
    ],
    "hasErrors": true
  },
  "version": 1
}
```


Publish Actionable Orchestration Source Event Action

Publish an actionable orchestration source event by using the payload current value and API name of the source object from a data object data change event.

This action is available in API version 62.0 and later.

Supported REST HTTP Methods

URI

`/services/data/v65.0/actions/standard/publishActionableOrchSrcEvent`

Formats

JSON, XML

HTTP Methods

POST

Authentication

`Authorization: Bearer`***`token`***

Inputs

Input	Details
`dataSpace`	**Type** string **Description** API name of the data space that's used to generate or manage contextual alerts.

Input	Details
payloadCurrentValue	**Type** string **Description** Required. JSON structure that contains name-value pairs from the PayloadCurrentValue field of the Data Object Data Change Event payload.
sourceObjectDeveloperName	**Type** string **Description** Required. API name of the source object developer named field that's mentioned in the Payload Current Value parameter.

Outputs

None.

Example

POST

This sample request is for the Publish Actionable Orchestration Source Event action.

```
{
  "inputs": {
    "payloadCurrentValue": {
      "ReplayId": "2606425",
      "CreatedDate": "2024-04-25 22:33:30",
      "CreatedById": "005SG000002IHqrYAG",
      "EventUuid": "b4235c47-e064-4d4b-b575-0141ba6d89b7",
      "EventType": "CDCEvent",
      "EventSchemaVersion": 1,
      "EventCreationDateTime": "2024-04-25 22:33:29",
      "EventPublishDateTime": "2024-04-25 22:33:30",
      "SourceObjectDeveloperName": "Large_Expenses__cio",
      "ActionDeveloperName": "Large_Expenses_Alert",
      "EventPrompt": "INSERT",
      "PayloadPrevValue": null,
      "PayloadCurrentValue": {
        "Large_Expenses__cio_Expense__c": 699.99,
        "Large_Expenses__cio_PartyId__c": "001SG000004TCczYAG",
        "Large_Expenses__cio_PartyName__c": "Julia Green",
        "Large_Expenses__cio_TransactionAmount__c": 699.99,
        "Large_Expenses__cio_TransactionDate__c": "2024-03-31 19:00:00",
        "Large_Expenses__cio_TransactionName__c": "Bill"
```

```
      },
      "PayloadSchema": null,
      "Offset": 32,
      "PayloadMetadata": {
        "ChangeEventHeader": {
          "changedFields": [
            "Large_Expenses__cio_Expense__c",
            "Large_Expenses__cio_PartyId__c",
            "Large_Expenses__cio_PartyName__c",
            "Large_Expenses__cio_TransactionAmount__c",
            "Large_Expenses__cio_TransactionDate__c",
            "Large_Expenses__cio_TransactionName__c"
          ],
          "commitTimestamp": "2024-04-25 22:32:37.905",
          "commitVersion": "8"
        }
      }
    },
    "dataSpace": "FSC",
    "sourceObjectDeveloperfield": "Large_Expenses__cio"
  }
}
```


Run Integration Plan

Triggers an integration plan using Dynamic Fulfillment Orchestration, which ensures each callout happens at the right time by queuing it alongside its dependent steps.

This action is available in API version 60.0 and later for users with a Financial Services Cloud license.

Supported REST HTTP Methods

URI

`/services/data/v`***XX.X***`/actions/standard/runIntegrationPlan`

Formats

JSON

HTTP Methods

POST

Authentication

`Authorization: Bearer` ***token***

Inputs

Input	Details
`contextId`	**Type** ID

Input	Details
	Description ID of the Context Service which references the record ID that supplies expression set input parameters. Recommended record objects are Applicant, ApplicationForm, and PartyProfile.
`integrationPlanId`	**Type** **ID** **Description** ID of the integration plan, which includes each callout step and step dependency.

Outputs

Input	Details
`status`	**Type** **ID** **Description** Status of the integration plan's progress. Valid values are Running, Not Started, Failed.

Example

JSON Request Body

```
{
  "inputs": {
    "integrationPlanId" : "13VSB000000IsYD2A0"
  }
}
```

JSON Response Body

```
{
  "actionName": "runIntegrationPlan",
  "errors": null,
  "isSuccess": true,
  "outputValues": {
    "status": "SUCCESS"
  },
  "version": 1
}
```

FINANCIAL SERVICES CLOUD TOOLING API OBJECTS

Tooling API exposes metadata used in developer tooling that you can access through REST or SOAP. Tooling API's SOQL capabilities for many metadata types allow you to retrieve smaller pieces of metadata. For more information about Tooling API objects and to find a complete reference of all the supported objects, see **Introducing Tooling API**.

ClaimFinancialSettings

Represents the configuration settings for Insurance Claim Financial Services. This object is available in API version 57.0 and later.

RelationshipGraphDefinition

Represents a definition of a graph that you can configure in your organization to traverse object hierarchies and record details, giving you a glimpse of how your business works. This object is available in API version 55.0 and later.

RevenueSourceCategoryConfig

Represents the Revenue Data Source-related stage information and the revenue metric that you want to measure and track. This object is available in API version 57.0 and later.

RevenueSourceObjectConfig

Represents data from the underlying Salesforce standard or custom object that stores opportunity and product-related information. This object is available in API version 57.0 and later.

Discovery Framework Tooling API Objects

Tooling API exposes metadata used in developer tooling that you can access through REST or SOAP. Tooling API's SOQL capabilities for many metadata types allow you to retrieve smaller pieces of metadata. For more information about Tooling API objects and to find a complete reference of all the supported objects, see **Introducing Tooling API**.

StageCondition

Represents a collection of fields to set up the rules in transition criteria and stage change, including the object state, logic, and values. This object is available in API version 62.0 and later.

ClaimFinancialSettings

Represents the configuration settings for Insurance Claim Financial Services. This object is available in API version 57.0 and later.

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

Supported SOAP API Calls

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

Supported REST API Methods

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

Fields

Field	Details
`ClaimCovPendingAuthStatus`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The status of pending financial authority for claim coverage.
`ClaimPendingAuthorityStatus`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The status of pending financial authority for claim.
`ClmCovPymtDtlPendAuthSts`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The status of pending financial authority for claim coverage payment detail.
`DeveloperName`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The unique name for the claim financial settings object.
`Language`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The language of the claim finanical settings.
`ManageableState`	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort

Field	Details
	Description Indicates the manageable state of the specified component that is contained in a package. Possible values are: • `beta`—Managed-Beta • `deleted`—Managed-Proposed-Deleted • `deprecated`—Managed-Proposed-Deprecated • `deprecatedEditable`—SecondGen-Installed-Deprecated • `installed`—Managed-Installed • `installedEditable`—SecondGen-Installed-Editable • `released`—Managed-Released • `unmanaged`—Unmanaged
`MasterLabel`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** Tne unique label that identifies the claim finanical settings throughout the Salesforce user interface.
`NamespacePrefix`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** Namespace prefix associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix.

RelationshipGraphDefinition

Represents a definition of a graph that you can configure in your organization to traverse object hierarchies and record details, giving you a glimpse of how your business works. This object is available in API version 55.0 and later.

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

Supported SOAP API Calls

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

Supported REST API Methods

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

Special Access Rules

The Financial Services Cloud permission set license is required to access this object.

Fields

Field	Details
`DeveloperName`	**Type** string **Properties** Filter, Group, Sort **Description** The unique name of the object in the API. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization. Label is **Record Type Name**.
`FullName`	**Type** string **Properties** Create, Group, Nillable **Description** The full name of the associated relationship graph in Metadata API. The full name can include a namespace prefix. Query this field only if the query result contains no more than one record. Otherwise, an error is returned. If more than one record exists, use multiple queries to retrieve the records. This limit protects performance.
`IsActive`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort **Description** Indicates whether the relationship graph is available for use (`true`) or not (`false`). The default value is `true`. Note: This field is read-only in API version 55.0.

Field	Details
`IsTemplate`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort **Description** Indicates whether you can configure this relationship graph as a template (`true`) or not (`false`). The default value is `false`. In the UI, this field is **Set as Template**.
`Language`	**Type** picklist **Properties** Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort **Description** The language of the relationship graph instance. Possible values are: • `da`—Danish • `de`—German • `en_US`—English • `es`—Spanish • `es_MX`—Spanish (Mexico) • `fi`—Finnish • `fr`—French • `it`—Italian • `ja`—Japanese • `ko`—Korean • `nl_NL`—Dutch • `no`—Norwegian • `pt_BR`—Portuguese (Brazil) • `ru`—Russian • `sv`—Swedish • `th`—Thai • `zh_CN`—Chinese (Simplified) • `zh_TW`—Chinese (Traditional)
`ManageableState`	**Type** ManageableState enumerated list **Properties** Filter, Group, Nillable, Restricted picklist, Sort

Field	Details
	Description Indicates the manageable state of the specified component that is contained in a package: • `beta` • `deleted` • `deprecated` • `deprecatedEditable` • `installed` • `installedEditable` • `released` • `unmanaged`
`MasterLabel`	**Type** string **Properties** Filter, Group, Sort **Description** Required. Label for the relationship graph instance. In the UI, this field is **Label**.
`Metadata`	**Type** RelationshipGraphDefinition **Properties** Create, Nillable, Update **Description** The relationship graph's metadata. Query this field only if the query result contains no more than one record. Otherwise, an error is returned. If more than one record exists, use multiple queries to retrieve the records. This limit protects performance.
`NamespacePrefix`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The namespace prefix associated with this object. Each Developer Edition organization that creates a managed package has a unique namespace prefix. Limit: 15 characters. You can refer to a component in a managed package by using the ***`namespacePrefix__componentName`*** notation. The namespace prefix can have one of the following values: • In Developer Edition organizations, the namespace prefix is set to the namespace prefix of the organization for all objects that support it. There is an exception if an object is in an installed managed package. In that case, the object has the namespace prefix of the

Field	Details
	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.
`RootObjectId`	**Type** string **Properties** Filter, Group, Sort **Description** The ID of the root object, which is the starting point or parent node in the relationship graph. For example, in a graph that displays how accounts, contacts, and financial goals are related, the account object is the root object, and its ID is the `RootObjectId`. This field is a relationship field. Note: Reserved for internal use. **Relationship Name** RootObject **Relationship Type** Lookup **Refers To** EntityDefinition

RevenueSourceCategoryConfig

Represents the Revenue Data Source-related stage information and the revenue metric that you want to measure and track. This object is available in API version 57.0 and later.

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

Supported SOAP API Calls

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

Supported REST API Methods

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

Special Access Rules

RevenueIntelligenceFinsAddOn and FinancialServiceCloudStandardAddOn licenses are required to access this object in your org. To view, create, edit, and delete records, the user requires ManageFSCAnalytics and RevenueIntelligenceUser permission set.

Fields

Field	Details
`ClosedDateFieldName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the field from Revenue Data Source that stores the opportunity close date.
`ClosedLostStageOption`	**Type** textarea **Properties** Create, Filter, Nillable, Sort, Update **Description** The options that represent the Closed Lost stage.
`ClosedWonStageOption`	**Type** textarea **Properties** Create, Filter, Nillable, Sort, Update **Description** The options that represent the Closed Won stage.
`DeveloperName`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The unique name of the object in the API. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization. Label is **Record Type Name**.
`IsActive`	**Type** boolean

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the category configurations are active `(true)` or not `(false)` The default value is `true` until the maximum active categories is reached. After that, the default value of this field is set to `False`.
`Language`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The language of the revenue source category object. Possible values are the supported languages in Financial Services Cloud.
`MasterLabel`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Label for the revenue source category configuration. In the UI, this field is Revenue Source Category Configuration.
`RevenueDataSourceFieldName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the field from Revenue Data Source that stores the revenue details as either amount or quantity.
`RevenueDataSourceId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The revenue data source record associated with this record. This field is a relationship field. **Relationship Name** RevenueDataSource

Field	Details
	Relationship Type Lookup **Refers To** RevenueSourceObjectConfig
`StageFieldName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the field from Revenue Data Source that stores the stage picklist values.

RevenueSourceObjectConfig

Represents data from the underlying Salesforce standard or custom object that stores opportunity and product-related information. This object is available in API version 57.0 and later.

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

Supported SOAP API Calls

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

Supported REST API Methods

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

Special Access Rules

RevenueIntelligenceFinsAddOn and FinancialServiceCloudStandardAddOn licenses are required to access this object in your org. To view, create, edit, and delete records, the user requires ManageFSCAnalytics and RevenueIntelligenceUser permission set.

Fields

Field	Details
`DeveloperName`	**Type** string **Properties** Create, Filter, Group, Sort, Update

Field	Details
	Description The unique name of the object in the API. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization. Label is **Record Type Name**.
`Language`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The language of the revenue source object configuration. Possible values are the supported languages in Financial Services Cloud.
`MasterLabel`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** Label for the revenue source object configuration. In the UI, this field is Revenue Source Object Configuration.
`PrimaryAccountFieldName`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The name of the field that stores the reference to account information. If there are multiple accounts for Revenue Source Dataset, then this field would be the reference to the primary account.
`ProductNameField`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of field from Revenue Data Source or Revenue Product Dataset that stores the product name information.

Field	Details
`ProductReferenceFieldName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the field from Revenue Data Source or Revenue Product Dataset that has a lookup to product information.
`ProductReferenceObjectName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the standard or custom object that stores product information.
`RevDataSourceRefFieldName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the field from Revenue Product Dataset that has a lookup to Revenue Data Source.
`RevenueDataSource`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The standard or custom object that stores opportunity information.
`RevenueProductDataset`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The standard or custom object that stores both opportunity and product information.
`UserIdentifierFieldName`	**Type** string **Properties** Create, Filter, Group, Sort, Update

Field	Details
	Description The name of the field that stores the user ID information of who owns the account.

Discovery Framework Tooling API Objects

Tooling API exposes metadata used in developer tooling that you can access through REST or SOAP. Tooling API's SOQL capabilities for many metadata types allow you to retrieve smaller pieces of metadata. For more information about Tooling API objects and to find a complete reference of all the supported objects, see **Introducing Tooling API**.

AssessmentQuestionConfig
Represents the assessment question record metadata configuration. This object is available in API version 56.0 and later.
AssessmentQuestionSetConfig
Reqpresents the assessment question set record metadata configuration. This object is available in API version 56.0 and later.

AssessmentQuestionConfig

Represents the assessment question record metadata configuration. This object is available in API version 56.0 and later.

Supported SOAP API Calls

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

Supported REST API Methods

`GET, HEAD, Query`

Special Access Rules

To use this tooling API object, you must enable the Discovery Framework feature in your Salesforce org.

Fields

Field	Details
`DeveloperName`	**Type** string **Properties** Filter, Group, Sort **Description** The unique name of the object in the API. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.

Field	Details
	In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization. Note: When creating large sets of data, always specify a unique DeveloperName for each record. If no DeveloperName is specified, performance slows down while Salesforce generates one for each record.
`Language`	**Type** picklist **Properties** Filter, Group, Restricted picklist, Sort **Description** Language of the assessment question.
`ManageableState`	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** Indicates the manageable state of the specified component that is contained in a package. Possible values are: • `beta`—Managed-Beta • `deleted`—Managed-Proposed-Deleted • `deprecated`—Managed-Proposed-Deprecated • `deprecatedEditable`—SecondGen-Installed-Deprecated • `installed`—Managed-Installed • `installedEditable`—SecondGen-Installed-Editable • `released`—Managed-Released • `unmanaged`—Unmanaged
`MasterLabel`	**Type** string **Properties** Filter, Group, Sort **Description** Label of the assessment question.
`NamespacePrefix`	**Type** string **Properties** Filter, Group, Nillable, Sort

Field	Details
	Description Namespace prefix associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix.

AssessmentQuestionSetConfig

Reqpresents the assessment question set record metadata configuration. This object is available in API version 56.0 and later.

Supported SOAP API Calls

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

Supported REST API Methods

`GET, HEAD, Query`

Special Access Rules

To use this tooling API object, you must enable the Discovery Framework feature in your Salesforce org.

Fields

Field	Details
`DeveloperName`	**Type** string **Properties** Filter, Group, Sort **Description** The unique name of the object in the API. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization. Note: When creating large sets of data, always specify a unique DeveloperName for each record. If no DeveloperName is specified, performance slows down while Salesforce generates one for each record.
`Language`	**Type** picklist **Properties** Filter, Group, Restricted picklist, Sort

Field	Details
	Description Language of the assessment question set.
`ManageableState`	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** Indicates the manageable state of the specified component that is contained in a package. Possible values are: • `beta`—Managed-Beta • `deleted`—Managed-Proposed-Deleted • `deprecated`—Managed-Proposed-Deprecated • `deprecatedEditable`—SecondGen-Installed-Deprecated • `installed`—Managed-Installed • `installedEditable`—SecondGen-Installed-Editable • `released`—Managed-Released • `unmanaged`—Unmanaged
`MasterLabel`	**Type** string **Properties** Filter, Group, Sort **Description** Label of the assessment question set.
`NamespacePrefix`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** Namespace prefix associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix.

StageCondition

Represents a collection of fields to set up the rules in transition criteria and stage change, including the object state, logic, and values. This object is available in API version 62.0 and later.

Supported SOAP API Calls

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

Supported REST API Methods

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

Special Access Rules

To access this object in your org, enable the Stage Management setting.

Fields

Field	Details
`ManageableState`	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** **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`
`Operator`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Operator for stage condition filter (enumeration of type string).

Field	Details
	Valid values are: • `Contains` • `DoesNotContain` • `Equals` • `GreaterOrEqual` • `GreaterThan` • `LessOrEqual` • `LessThan` • `NotEqualTo` • `StartsWith`
`SequenceNumber`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The order of the object state transition condition in a sequence.
`SourceField`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The object field to define filter conditions.
`StageCriteriaId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The stage criteria associated with the stage definition. This field is a relationship field. **Relationship Name** StageCriteria **Relationship Type** Master-detail **Refers To** StageCriteria (the master object)

Field	Details
`Value`	**Type** textarea **Properties** Create, Nillable, Update **Description** Value for the field criteria.

FINANCIAL SERVICES CLOUD CUSTOM METADATA TYPES

Financial Services Cloud Custom Metadata Types

Use custom metadata types and fields that help deliver additional features for Financial Services Cloud.

Fields and custom metadata types in the package have the `FinServ` namespace prefix. For example,
`FinServ__AccountRecordType__c` is a custom field on Individual Record Type Mapper.
`Finserv__IndividualRecordTypeMapper__mdt` is a custom metadata type.

Not all fields are listed for some custom metadata types. To verify the complete list of fields for a custom metadata type, use a describe call from the API, inspect the WSDL, or use a schema viewer.

IndividualRecordTypeMapper

Maps a new custom Individual record type to the standard Individual record type from Financial Services Cloud.

Note: New custom fields can't be added to managed custom metadata types.

Supported Calls

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

Field	Details
`AccountRecordTypeNamespace__c`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** Namespace for Account record type being mapped.
`AccountRecordType__c`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The name of your new custom Individual record type being mapped to the Financial Services Cloud Individual record type. Note: This field is for Salesforce internal-use only. By default, this field doesn't appear on any page layout.

Field	Details
ContactRecordTypeNamespace__c	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** Namespace for Contact record type being mapped.
ContactRecordType__c	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** Contact record type being mapped to the Financial Services Cloud Individual record type.
DetailPage__c	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** Salesforce internal-use only.
IndividualType__c	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** Type of Individual being mapped.
LeadRecordTypeNamespace__c	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** Lead namespace for your custom record type's org.
LeadRecordType__c	**Type** string **Properties** Filter, Group, Nillable, Sort

Field	Details
	Description Lead Record Type to be used when converting Lead records. Leave this field blank to use any record type. All available record types are converted to an Individual record type unless there is another mapping specified.

GroupRecordTypeMapper

Maps a new custom Group record type to the standard Group record type from Financial Services Cloud.

Note: New custom fields can't be added to managed custom metadata types.

Supported Calls

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

Field	Details
`AccountRecordType__c`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The name of your new custom Group record type being mapped to the Financial Services Cloud Group record type. Note: This field is for Salesforce internal-use only. By default, this field doesn't appear on any page layout.
`AccountRecordTypeNamespace__c`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** Namespace for Account record type being mapped.

ReferralRecordTypeMapper

Maps a new custom record type on the Lead object, used to represent a new type of referral, to the standard Referral record type from Financial Services Cloud.

Note: New custom fields can't be added to managed custom metadata types.

Supported Calls

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

Field	Details
`LeadRecordType__c`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The name of your new custom record type on the Lead object being mapped to the Financial Services Cloud Referral record type. Note: This field is for Salesforce internal-use only. By default, this field doesn't appear on any page layout.
`LeadRecordTypeNamespace__c`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** Namespace for Lead record type being mapped.

FINANCIAL SERVICES CLOUD CUSTOM TRIGGERS AND VALIDATION RULES

Financial Services Cloud Custom Triggers

Custom triggers ensure that data flows correctly through the Financial Services Cloud custom objects and fields.

Custom triggers use the `FinServ` namespace prefix. For example, FinServ__AccountTrigger, which is a custom trigger on Account that performs tasks on Account, Contact, and the relationship object AccountAccountRelation.

Table 1: Financial Services Cloud Quick Reference for Triggers

Trigger Name	Host Object
FinServ__AccountAccountRelationTrigger.trigger	AccountAccountRelation
FinServ__AccountContactRelationTrigger.trigger	AccountContactRelation
FinServ__AccountTrigger.trigger	Account
FinServ__AlertTrigger.trigger	Alert
FinServ__AssetsAndLiabilitiesTrigger.trigger	AssetsAndLiabilities
FinServ__ContactContactRelationTrigger.trigger	ContactContactRelation
FinServ__ContactTrigger.trigger	Contact
FinServ__EventTrigger.trigger	Event
FinServ__FinancialAccountRoleTrigger.trigger	FinancialAccountRole
FinServ__FinancialAccountTrigger.trigger	FinancialAccount
FinServ__FinancialGoalTrigger.trigger	FinancialGoal
FinServ__FinancialHoldingTrigger.trigger	FinancialHolding
FinServ__LeadTrigger.trigger	Lead
FinServ__OpportunityTrigger.trigger	Opportunity
FinServ__RBLFilterCriteriaTrigger.trigger	RBLFilterCriteria
FinServ__ReciprocalRoleTrigger.trigger	ReciprocalRole
FinServ__RevenueTrigger.trigger	Revenue
FinServ__RollupByLookupConfigTrigger.trigger	RollupByLookupConfig
FinServ__SecuritiesTrigger.trigger	Securities
FinServ__TaskTrigger.trigger	Task
FinServ__InsurancePolicyTrigger.trigger	InsurancePolicy
FinServ__ClaimTrigger.trigger	Claim

Trigger Behavior

The package provides triggers on sObjects, Relation sObjects, and Rollup sObjects. Each object type's trigger checks for various conditions and then performs tasks based on what it finds. Each object has one trigger. The following list explains trigger behavior by object.

sObjects

Note: The Account triggers support orgs using either the individual or person account models. Where the person account model is in use, the steps involving the creation of a Contact aren't needed.

Account

Before insert: If the record type indicates that the account isn't a portion of an individual, `IndividualType` is set to blank.

After insert: If the user creates an account of record type Individual, create an individual contact linked to the account. Also assigns topics based on the value in the field after an account has been created.

The steps to create an individual contact and assign topics are:

- For each account created, creates a contact.
- For each contact, adds `AccountId`.
- For each account, in a **future** method, adds `ContactId`.
- Sets `IndividualId__c` to `AccountId` concatenated with the current date.

Before update: Validates that the update on the account:

- Hasn't changed the account's record type from individual to another record type, and hasn't changed from one individual record type to another.
- Hasn't changed the account's record type from another record type to an individual record type.

After update: Syncs the contact associated with the updated account to reflect the updated fields. The following fields are synced:

- `AccountName`
- `OwnerId`
- `IndividualType__c`
- `RecordTypeId`

Before delete: Helps perform cascade deletes. Gathers all the rollup objects related to the account to be deleted.

After delete: Rolls back the rollup objects related to the deleted account.

Contact

Before insert: Creates an individual (Account - Representing Party) when the individual contact is promoted as an individual as follows.

- For each account that is passed, creates a contact.
- For each contact, adds `AccountId`.
- For each account, in a **future** method, adds `ContactId`.
- Sets `IndividualId__c` to `AccountId` concatenated with the current datetime.

After insert: Validates that the referenced individual account does not have a contact associated with it. This check is bypassed during a lead conversion.

Before update: Validates that the update on the account record:

- Hasn't changed the record type of the account from individual to another record type.
- Hasn't changed the record type of the account from any other record type to an individual.

- Validates that the referenced individual account does not have a contact associated with it.

After update: Syncs the account associated with the updated contact to reflect the updated fields. The following fields are synced:

- `AccountName`
- `OwnerId`
- `IndividualType__c`
- `RecordTypeId`

Reciprocal Role

After insert: If the role has the flag to create a reciprocal role set, creates a Reciprocal Role sObject for the inverse role.

Before delete: Where there is an inverse Reciprocal Role sObject record, delete that record.

RollupByLookupConfig

Before insert: Validates each new RollupByLookupConfig object according to these rules:

- Can't insert a duplicate RollupByLookupConfig object. Duplicate records are those that share combination of `ToObject__c`, `ToField__c`, and `LookupField__c`.
- Can't exceed 40 active RollupByLookupConfig objects.
- The fields and lookups on the RollupByLookupConfig object must be valid.
- The Where Clause field must contain a correctly formatted SQL expression.

Before update: Performs the same actions as before insert.

Before delete: Validates that the RollupByLookupConfig object isn't active (active objects can't be deleted).

RBLFilterCriteria

Before insert: Validates each new RBLFilterCriteria object according to these rules:

- A RBLFilterCriteria object can't be inserted when its parent is active.
- The fields on the RBLFilterCriteria object must be valid.
- The Operator must be valid ('greater than', 'equals', 'greater than or equals to', 'contains', 'not equal to', 'less than', 'less than or equal to', 'not contains', 'not like', 'starts with', 'ends with', 'in').

Before update: Performs the same actions as before insert.

Before delete: Validates that the RBLFilterCriteria object's parent RollupByLookupConfig object isn't active (RBLFilterCriteria objects with an active parent RollupByLookupConfig object can't be deleted).

Note: Alerts and Securities sObjects don't have triggers.

Relation sObjects

Note: Rollup calculation triggers are fired when Enable Rollup Summary is enabled in the Wealth Application Config custom setting. For more details, see Temporarily Disable Rollups to Accelerate Data Loads.

AccountContactRelation (ACR)

Before insert: Populates `RecordTypeId` and `Date` for each ACR record to be inserted. Ensures that each ACR obeys these requirements:

- No multiple primary members for a given household.
- Contact portion can't be a member of multiple households.
- No multiple ACR records with the same `AccountId` and `ContactId` combination.

After insert: Recalculates the rollups for all groups in which member or business ACRs have changed.

Before update: Performs the same actions as before insert.

After update: Performs the same actions as after insert.

Before delete: Ensures that none of the ACRs to be deleted are of the record type Group. Also recalculates rollups for all groups when any member or business ACRs have changed.

AccountAccountRelation (AAR)

After insert: If the auto-create inverse setting is selected, create the inverse record.

Before update: Checks to see if records are being deactivated. If so, sets `EndDate__c` as the day of the update, and if the auto-create inverse setting is selected deactivates the inverse record.

Before delete: If the auto-create inverse setting is selected, delete the inverse record of the AAR.

ContactContactRelation (CCR)

After insert: If the auto-create inverse setting is selected, creates the inverse record.

Before update: If records are being deactivated, sets `EndDate__c` as today, and if the auto-create inverse setting is selected deactivates the inverse record.

Before delete: If the auto-create inverse setting is selected, deletes the inverse record of the CCR.

Rollup sObjects

Note: Rollup sObject triggers provide for updating `Household__c`, which points to the account portion of the group that they roll up to. Usually, the rollup calculation is also calculated.

Household triggers are fired when Enable Group Record Rollups is enabled in the Wealth Application Config custom setting. After the triggers are fired, any active rollup calculations are performed when Enable Rollup Summary is enabled in the Wealth Application Config. For more details, see Temporarily Disable Rollups to Accelerate Data Loads.

Financial Account

Before insert: Sets the value of the owner type when a FinancialAccount record is updated. Then sets `Household__c` to the account portion of the group that it's rolling up to.

After insert:

- Creates a primary owner financial account role for the new financial account.
- If defined, creates joint owner roles and user-selected roles.
- Performs the rollup calculation.

Before update: Performs the same actions as before insert.

After update: Performs the same actions as after insert.

Before delete: Deactivates all Financial Account Roles related to the Financial Account by performing an UPDATE to set Active value to False.

After delete: Performs the rollup calculation.

Financial Account Role (FAR)

Before insert: If `RelatedContact__c` of the FAR record is associated with an individual account, updates `RelatedAccount__c` to that of the individual account.

After insert: For FAR records of type Joint Owner, updates the Joint Owner field on the associated Financial Account record, then performs the rollup calculations.

Before update: Performs the same actions as before insert and, if the user has chosen to deactivate the FAR records, sets the end day to the current day.

After update: Performs the rollup calculations.

Before delete: Blocks the deletion of any FAR records of type Primary Owner. FAR records of type Primary Owner must be deleted from the associated Financial Account record. For FAR records of type Joint Owner, updates the Joint Owner field on the associated Financial Account record.

After delete: Performs the rollup calculations.

Assets and Liabilities

Before insert: Sets `Household__c` to the account portion of the group that it's rolling up to.

Before update: Performs the same action as before insert.

Financial Goals

Before insert: Sets `Household__c` of the FinancialGoal record to the account portion of the group that the financial goal is rolling up to.

Before update: Performs the same action as before insert.

Financial Holdings

Before insert: Retrieves financial account fields based on the FinancialHolding record and then populates `Household__c` and `PrimaryOwner` on the financial holding to be inserted.

Note: Financial holdings aren't part of the rollup objects, so no rollup is performed.

Revenue

After insert: Performs the rollup calculations.

After update: Performs the rollup calculations.

After delete: Performs the rollup calculations.

Tasks

Before insert: Sets `Household__c` of the Task record to the account portion of the group that the task is rolling up to.

After insert: Updates the Next and Last interaction for the Contact that is associated with the task.

Before update: Performs the same action as before insert.

After update: Performs the same action as after insert.

After delete: Performs the same action as after insert.

Events

Before insert: Sets `Household__c` of the Event record to the account portion of the group that the event is rolling up to.

After insert: Updates the Next and Last interaction for the Contact that is related to the event.

Before update: Performs the same action as before insert.

After update: Performs the same action as after insert.

After delete: Performs the same action as after insert.

Leads

Before insert: For individual data models only, this trigger maps the lead name to the company name field and updates the company name to the employer field for leads converted into individuals. It also checks and performs household rollup for referrals and stamps the `ReferredByContact__c`on the Lead object.

After insert: Updates the Next and Last interaction for the Contact that is related to the event.

Before update: For the individual data model, this trigger maps the lead name to the company name field and updates the employer field for leads converted into individuals. It validates data to ensure that Referral-mapped type Lead records are not associated with non-individuals and restricts mixed Account and Contact individual and non-individual record types. It also prevents any lead with

expressed interest from being converted to a new individual. Additionally, it checks and performs household rollup for referrals and stamps the `ReferredByContact__c` field on the Lead object.

After update: Ensures that the lead-converted contact is set as the primary contact on the account and that the opportunity linked to the lead is updated with the appropriate record type. After the lead is converted, it updates the converted accounts with the referred-by values from the lead. Additionally, it calculates and updates referral scores for the contact.

Opportunities

Before insert: Sets `Household__c` of the Opportunity record to the account portion of the group that the opportunity is rolling up to.

Before update: Performs the same action as before insert.

Insurance Policy

Before insert: Sets `Household__c` of the Insurance Policy record to the account portion of the household that the insurance policy is rolling up to.

Before update: Performs the same action as before insert.

Claim

Before insert: Sets `Household__c` of the Claim record to the account portion of the household that the claim is rolling up to.

Before update: Performs the same action as before insert.

Financial Services Cloud Custom Validation Rules

Custom validation rules ensure the integrity of your Financial Services Cloud data.

Custom validation rules use the `FinServ` namespace prefix. For example, FinServ__NonPortalUserReferrer is a custom validation rule on Account that validates that internal referrers are Salesforce users.

Table 2: Financial Services Cloud Quick Reference for Validation Rules

Validation Rule Name	Host Object	Default Status
NonPortalUserReferrer	Account	Active
NotAllowingConversionFromIndividual (retired)	Account	Inactive
NotAllowingConversionToIndividual (retired)	Account	Inactive
SingleReferredByEntryByRecord	Account	Active
AARCanOnlyBeDeactivated	AccountAccountRelation	Active
AccountAndRelatedAccountCannotBeSame	AccountAccountRelation	Active
AccountCannotBeAnIndividual	AccountAccountRelation	Active
CannotCreateInactiveRecord	AccountAccountRelation	Active
InactiveAARCannotBeEdited	AccountAccountRelation	Active
NoJointOwnerForIndividualAccounts	AssetsAndLiabilities	Active
PrimaryAndJointOwnerCannotBeSame	AssetsAndLiabilities	Active
BirthdateCannotBeInFuture	Contact	Active
CannotHaveMoreThanOnePrimaryAddress	Contact	Active

Validation Rule Name	Host Object	Default Status
ContactCannotBeAssociatedToHousehold	Contact	Active
IndividualCannotHaveMoreThanOneContact (retired)	Contact	Inactive
NonPortalUserReferrer	Contact	Active
NotAllowingConversionFromIndividual (retired)	Contact	Inactive
NotAllowingConversionToIndividual (retired)	Contact	Inactive
SingleReferredByEntryByRecord	Contact	Active
CannotCreateInactiveRecord	ContactContactRelation	Active
CCRCanOnlyBeDeactivated	ContactContactRelation	Active
ContactAndRelatedContactCannotBeSame	ContactContactRelation	Active
InactiveCCRCannotBeEdited	ContactContactRelation	Active
YearOfGradCannotBeInFuture	Education	Active
EndDateCannotBeInFuture	Employment	Active
StartDateCannotBeInFuture	Employment	Active
StartDateCannotBeLaterThanEndDate	Employment	Active
ManagedAndHeldAwayCannotBeBothSelected	FinancialAccount	Active
NoJointOwnerForIndividualAccounts	FinancialAccount	Active
PrimaryAndJointOwnerCannotBeSame	FinancialAccount	Active
CannotCreateInactiveRecord	FinancialAccountRole	Active
FARCannotBeModified	FinancialAccountRole	Active
InactiveFARCannotBeEdited	FinancialAccountRole	Active
InactiveRecordCannotBeReactivated (retired)	FinancialAccountRole	Active
OwnershipRolesCannotBeDeactivated	FinancialAccountRole	Active
OwnershipRolesCannotBeModified (retired)	FinancialAccountRole	Active
RelatedAccountOrContactRequired	FinancialAccountRole	Active
RoleIsMandatory	FinancialAccountRole	Active
ExpDateCannotBeLaterThanStart	IdentificationDocument	Active
IssueDateCannotBeInFuture	IdentificationDocument	Active
VerificationDateTimeCannotBeInFuture	IdentificationDocument	Active
NonPortalUserReferrer	Lead	Active
SingleReferredByEntryByRecord	Lead	Active

Validation Rule Name	Host Object	Default Status
NonPortalUserReferrer	Opportunity	Active
SingleReferredByEntryByRecord	Opportunity	Active
ProhibitUpdates	ReciprocalRole	Active
AccountOrFinancialAccountRequired	Revenue	Active

Table 3: Validation Rule Details

Object	Validation Rule Details
Account	NonPortalUserReferrer: Validation fails if the value of the `UserType` field on the ReferredByUser is not *`Standard`*. NotAllowingConversionFromIndividual (retired): This validation rule has been retired. NotAllowingConversionToIndividual (retired): This validation rule has been retired. SingleReferredByEntryByRecord: Validation fails if both `ReferredByUser__c` and `ReferredByContact__c` are not blank.
AccountAccountRelation	AARCanOnlyBeDeactivated: Validation fails if `Account__c` or `RelatedAccount__c` is changed on an existing record. AccountAndRelatedAccountCannotBeSame: Validation fails if `Account__c` is the same as `RelatedAccount__c`. AccountCannotBeAnIndividual: : Validation fails if the `IndividualType__c` field on the account or related account is set to *`Individual`*. CannotCreateInactiveRecord: : Validation fails if a record is marked inactive when created. InactiveAARCannotBeEdited: Validation fails if a user tries to edit an existing record that's marked inactive.
AssetsAndLiabilities	NoJointOwnerForIndividualAccounts: Validation fails if the `JointOwner__c` field is not blank and`Ownership__c` field value is *`Individual`*. PrimaryAndJointOwnerCannotBeSame: Validation fails if the `PrimaryOwner__c` is the same as the `JointOwner__c`.
Contact	BirthdateCannotBeInFuture: Validation fails if `birthdate__c` is in the future.

Object	Validation Rule Details
	CannotHaveMoreThanOnePrimaryAddress: Validation fails if more than one address (mailing, billing, shipping, or other) is marked as primary. ContactCannotBeAssociatedToHousehold: Validation fails if account record type is `IndustriesHousehold`. IndividualCannotHaveMoreThanOneContact (retired): This validation rule has been retired. NonPortalUserReferrer: Validation fails if the value of the `UserType` field on the ReferredByUser is not `Standard`. NotAllowingConversionFromIndividual (retired): This validation rule has been retired. NotAllowingConversionToIndividual (retired): This validation rule has been retired. SingleReferredByEntryByRecord: Validation fails if both `ReferredByUser__c` and `ReferredByContact__c` are not blank.
ContactContactRelation	CannotCreateInactiveRecord: Validation fails if a record is marked inactive when created. CCRCanOnlyBeDeactivated: Validation fails if the contact, related contact, or role is changed on an existing record. ContactAndRelatedContactCannotBeSame: Validation fails if the contact is the same as the related contact. InactiveCCRCannotBeEdited: Validation fails if a user tries to edit an existing record that's marked inactive.
Education	YearOfGradCannotBeInFuture: Validation fails if the year of `GraduationDate__c` is after this year.
Employment	EndDateCannotBeInFuture: Validation fails if `EndDate__c` is after today. StartDateCannotBeInFuture: Validation fails if `StartDate__c` is after today. StartDateCannotBeLaterThanEndDate: Validation fails if `StartDate__c` is later than `EndDate__c`.
FinancialAccount	ManagedAndHeldAwayCannotBeBothSelected: Validation fails if both `Managed__c` and `HeldAway__c` are checked. NoJointOwnerForIndividualAccounts: Validation fails if `JointOwner__c`is not blank and `Ownership__c` is `Individual`.

Object	Validation Rule Details
	PrimaryAndJointOwnerCannotBeSame: Validation fails if `PrimaryOwner__c` is the same as `JointOwner__c`.
FinancialAccountRole	CannotCreateInactiveRecord: Validation fails if the `EndDate__c` is blank and the record is inactive. FARCannotBeModified: Validation fails if `RelatedAccount__c`, `RelatedContact__c`, `FinancialAccount__c`, or `Role__c` is changed on an existing record. InactiveFARCannotBeEdited: Validation fails when any edits are made to an existing inactive record. InactiveRecordCannotBeReactivated (retired): This validation rule has been retired. OwnershipRolesCannotBeDeactivated: Validation fails if an inactive record is updated to active. OwnershipRolesCannotBeModified (retired): This validation rule has been retired. RelatedAccountOrContactRequired: Validation fails if `RelatedAccount__c` and `RelatedContact__c` are both blank. RoleIsMandatory: Validation fails if `Role` is blank.
IdentificationDocument	ExpDateCannotBeLaterThanStart: Validation fails if `IssueDate__c` is after the `ExpirationDate__c`. IssueDateCannotBeInFuture: Validation fails if `IssueDate__c` is after today. VerificationDateTimeCannotBeInFuture: Validation fails if `VerificationOn__c` is in the future.
Lead	NonPortalUserReferrer: Validation fails if the value of the `UserType` field on the ReferredByUser is not *`Standard`*. SingleReferredByEntryByRecord: Validation fails if `ReferredByUser__c` and `ReferredByContact__c` are both blank or both not blank.
Opportunity	NonPortalUserReferrer: Validation fails if the value of the `UserType` field on the ReferredByUser is not *`Standard`*. SingleReferredByEntryByRecord: Validation fails if both `ReferredByUser__c` and `ReferredByContact__c` are not blank.
ReciprocalRole	ProhibitUpdates: Validation fails if `CreateInverseRole__c`, `Name`, `InverseRole__c`, or `RecordTypeId` is changed.

Object	Validation Rule Details
Revenue	AccountOrFinancialAccountRequired: Validation fails if `Account__c` and `FinancialAccount__c` are both blank or both not blank.

DATA PROCESSING ENGINE AND MONITOR WORKFLOW SERVICES

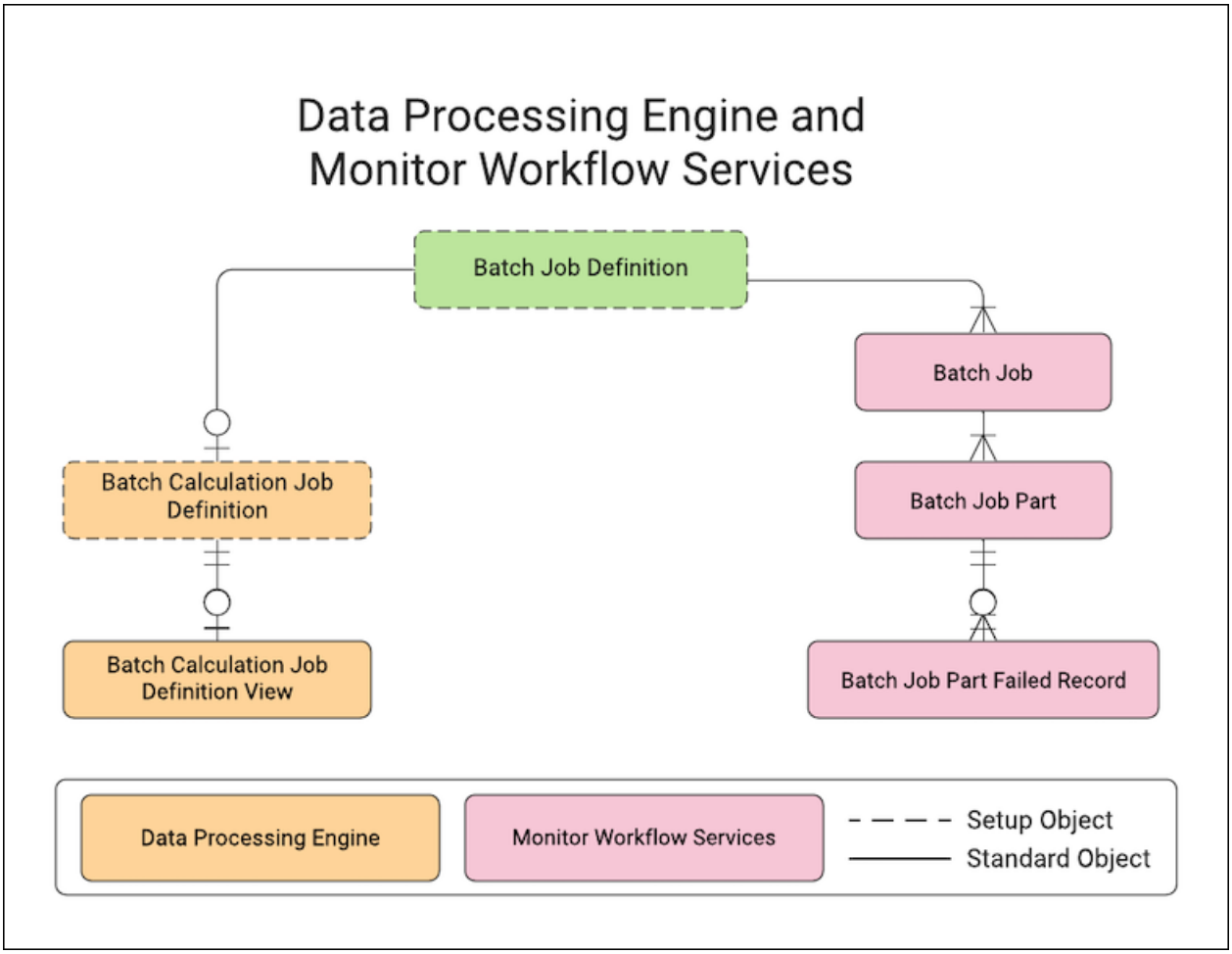
Data Processing Engine helps you transform data that's available in your Salesforce org and write back the transformation results as new or updated records. You can transform the data for standard and custom objects using Data Processing Engine definitions. After you activate a Data Processing Engine definition, you can run it. Each run can be tracked using Monitor Workflow Services.

Here's the data model for Data Processing Engine and Monitor Workflow Services:

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, or Rebate Management. Data Processing Engine isn't available for Salesforce orgs in Government Cloud or Government Cloud Plus.



Here is the list of developer resources you can use for Data Processing Engine:

- Standard Object
  - BatchCalcJobDefinitionView
- Setup Objects
  - BatchCalcJobDefinition
  - BatchJobDefinition

  To know more about setup objects, see the Tooling API Developer Guide.
- Invocable Actions
  - dataProcessingEngineAction
- Platform Event
  - BatchJobStatusChangedEvent

Here is the list of standard objects for Monitor Workflow Services:

- BatchJob
- BatchJobPart
- BatchDataPartFailedRecord

To know more about Data Processing Engine, see the Data Processing Engine help.

API END-OF-LIFE POLICY

Salesforce is committed to supporting each API version for a minimum of three years from the date of first release. In order to mature and improve the quality and performance of the API, versions that are more than three years old sometimes are no longer supported.

Salesforce notifies customers who use an API version scheduled for deprecation at least one year before support for the version ends.

Salesforce API Versions	Version Support Status	Version Retirement Info
Versions 31.0 through 65.0	Supported.	
Versions 21.0 through 30.0	As of Summer '25, these versions are retired and unavailable.	Salesforce Platform API Versions 21.0 through 30.0 Retirement
Versions 7.0 through 20.0	As of Summer '22, these versions are retired and unavailable.	Salesforce Platform API Versions 7.0 through 20.0 Retirement

If you request any resource or use an operation from a retired API version, REST API returns the `410:GONE` error code.

To identify requests made from old or unsupported API versions, use the free API Total Usage event type.