



Revenue Cloud Developer Guide

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CHAPTER 1 Get Started with Revenue Cloud Developer Resources

Get a single, unified system to automate your CRM processes. Use the developer sources of Revenue Cloud to automate the backend work to support the end-to-end revenue solution.

Revenue Cloud provides extensible and API-first business components of the product-to-cash processes. Learn more about the developer resources that are available for these components.

EDITIONS

Available in: Lightning Experience

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

Product Catalog Management

Create and manage an entire product portfolio with components such as attributes, product classifications, simple and bundled products, and rules.

- Use [standard objects](#) and fields to manage products, rules, and catalogs.
- Use [business APIs](#) to serve catalog definitions to users or applications.
- Use [metadata API](#) types to access and manage the metadata types, such as product specification type and product specification record types.
- Use [tooling API](#) objects to retrieve and manage smaller pieces of metadata types through SOQL capabilities. Use REST or SOAP to access metadata.
- Use [Product Discovery business APIs](#), which are composite APIs, to search products or to discover catalogs, products, and categories.

Salesforce Pricing

Create a reliable pricing solution for your users through customized price adjustment schedules. Get accurate pricing for your entire product portfolio.

- Use [standard objects](#) and fields to manage pricing processes such as product management, and the calculation and application of discounts.
- Use [business APIs](#) to get unified pricing experiences across product lines.
- Use [invocable actions](#) to invoke the pricing Connect API by providing the pricing, context, and price waterfall details.
- Use [metadata API](#) types to work with the metadata associated with Flows and Salesforce Pricing settings.

- Use [tooling API](#) objects to retrieve and manage smaller pieces of metadata types through SOQL capabilities such as pricing action parameters, pricing procedure output map, and pricing recipe details. Use REST or SOAP to access metadata.

Product Configurator

Customize the components and attributes of a product to meet the business requirement expectations.

- Use [standard objects](#) to manage product-related information.
- Use the [business APIs](#) to retrieve and update a product's configuration from a configurator or to access configurator capabilities by integrating with any front-end application.

Transaction Management

Manage subscription lifecycles from quotes and orders to contracts, assets, amendments, and renewals. Get insights into customer assets and see a consolidated list of all assets that belong to an account.

- Use [standard objects](#) and fields to manage transactions and details of a customer asset. Use the QuoteSaveEvent [platform event](#) to notify subscribers after saving of a quote is processed.
- Use [business APIs](#) to place, clone, or supplement a sales transaction. You can also initiate amendment, renewal, or cancellation of assets by using APIs.
- Use [invocable actions](#) to create and activate an order from a quote, or to initiate amendment, renewal, or cancellation of assets through invocable actions.
- Use [metadata API](#) types to work with the metadata associated with Flows.
- Use built-in [Apex classes and interfaces](#) grouped by namespace.

Usage Management

Ensure transparent, accurate, and efficient management of usage data and estimated usage amount.

- Use [standard objects](#) and fields to set up and manage consumption of usage-based products.
- Use [metadata API](#) types to work with the metadata associated with Usage Management.
- Use [business APIs](#) to get details of a usage-based product that's associated with an asset, an order item, or a quote line item.
- Use [invocable actions](#) to invoke usage summaries, process consumption overages, and refresh usage entitlements.

Rate Management

Quote and price products based on predefined rates for future use of the product or service.

- Use [standard objects](#) and fields to manage rates and discounts for a product's resource consumption.
- Use [metadata API](#) types to work with the metadata associated with Rate Management settings.
- Use [business APIs](#) to get details of a rate plan and persisted rating waterfall.
- Use [invocable action](#) to invoke the rating service to rate the usage records.

Dynamic Revenue Orchestrator

Get visibility into a product's fulfillment journey. Also, get a view of the entire fulfillment design processes.

- Use [standard objects](#) to manage details of a product's fulfillment.
- Use [invocable actions](#) to submit an order or a sales transaction to Dynamic Revenue Orchestrator for fulfillment.
- Use [metadata API](#) types to work with the metadata associated with Flows.
- Use [callout](#) step types to make HTTP calls to an external system.

Billing

Get an integrated and extensible subscription and usage-based billing solution. Automate processes such as payment processing, invoice generation, and usage-based billing.

- Use [standard objects](#) to manage billing and tax configurations, credit memos, and invoices.
- Use [platform events](#) types to know more about standard platform events.
- Use [invocable actions](#) to manage credit application, billing schedules, and invoices.
- Use [business APIs](#) to manage credit application and to handle billing scenarios.
- Use built-in [Apex classes](#) to access the same capabilities that are available in the Billing Business APIs.
- Use [metadata API](#) types to work with the metadata associated with Billing settings and Flows.

See the [RevenueManagementSettings](#) on page 4 metadata type to set up Revenue Cloud through configuration settings.

SEE ALSO:

[Business Rules Engine](#)

[Context Service](#)

[Salesforce Contracts](#)

CHAPTER 2 RevenueManagementSettings

Represents the configuration settings to set up Revenue Cloud.

Parent Type and Manifest Access

This type extends the [Metadata](#) metadata type and inherits its `fullName` field.

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

File Suffix and Directory Location

`RevenueManagementSettings` values are stored in the `revenuemanagement.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

`RevenueManagementSettings` is available in API version 60.0 and later.

Special Access Rules

This metadata settings type is available with Revenue Cloud.

Fields

Field Name	Description
<code>enableAdvCreateOrdersFromQuote</code>	<p>Field Type boolean</p> <p>Description Indicates whether to enable users to choose a method for generating multiple orders from a single quote (<code>true</code>) or not (<code>false</code>). This setting updates the functionality of the Create Order capability on quotes. Available in API version 65.0 and later.</p>

Field Name	Description
<code>enableAdvancedDetailLinePricing</code>	<p>Field Type boolean</p> <p>Description Indicates whether to enable advanced pricing for quote and order detail line items (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>. Available in API version 65.0 and later.</p>
<code>enableAsIsRenewals</code>	<p>Field Type boolean</p> <p>Description Indicates whether users can enable as-is renewals capability for existing assets (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>. Available in API version 64.0 and later.</p>
<code>enableAutoAddDerivedAsset</code>	<p>Field Type boolean</p> <p>Description Indicates whether to automatically add assets with derived pricing to a quote or an order when contributing products are added to it (<code>true</code>) or not (<code>false</code>). Available in API version 62.0 and later.</p>
<code>enableCoreCPQ</code>	<p>Field Type boolean</p> <p>Description Indicates whether to enable read and write access to Revenue Cloud features and objects (<code>true</code>) or not (<code>false</code>). See Enable Revenue Cloud Features in Your Scratch Org.</p>
<code>enableDeltaPricing</code>	<p>Field Type boolean</p> <p>Description Indicates whether to reprice faster by processing only the changes (delta) made to quotes and orders (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>. Available in API version 63.0 and later.</p>
<code>enableGroupRamp</code>	<p>Field Type boolean</p>

Field Name	Description
	<p>Description Reserved for internal use.</p>
enableGroupRampPref	<p>Field Type boolean</p> <p>Description Indicates whether to create ramp deals for multiple products by creating group ramp segments (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>. Configure group ramp segments with specific start dates and end dates, and different product quantities and prices. Available in API version 65.0 and later.</p> <p>Before you enable this setting, ensure the <code>groupsEnabled</code> and <code>enableTransactionCloning</code> fields are set to <code>true</code>.</p>
enableRampDeal	<p>Field Type boolean</p> <p>Description Indicates whether to create ramp deals for individual line items by creating segments with specific start dates, end dates, quantities, and prices (<code>true</code>) or not (<code>false</code>). Available in API version 62.0 and later.</p>
enableRevUnifiedSetup	<p>Field Type boolean</p> <p>Description Indicates whether to enable the usage of a procedure plan for price calculation (<code>true</code>) or not (<code>false</code>).</p>
enableTransactionCloning	<p>Field Type boolean</p> <p>Description Indicates whether to clone quotes or orders with their line items and groups, or clone the individual line items and groups of line items. Available in API version 64.0 and later.</p>
enableTransactionProcessor	<p>Field Type boolean</p>

Field Name	Description
	<p>Description</p> <p>Indicates whether to enable transaction types for quotes and orders (<code>true</code>) or not (<code>false</code>). Transaction types optimize the way transactions are processed, depending on their size, complexity, and the business needs of the org. You can't turn off transaction processing after it's turned on. Available in API version 63.0 and later.</p> <p>To set a default transaction type, create transaction types, and select the default. After you select a default transaction type, you can't be without a default.</p>
<code>groupsEnabled</code>	<p>Field Type boolean</p> <p>Description</p> <p>Indicates whether users can group line items in quotes and orders (<code>true</code>) or not (<code>false</code>). Available in API version 62.0 and later.</p>
<code>hidePriceRefreshNtfcn</code>	<p>Field Type boolean</p> <p>Description</p> <p>Indicates whether to hide the notification that appears when quote or order prices aren't updated (<code>true</code>) or not (<code>false</code>). Hiding this notification may affect saving quotes and creating orders because you could be using outdated prices. The default value is <code>false</code>. Available in API version 65.0 and later.</p>
<code>relaxUniqueCipValidation</code>	<p>Field Type boolean</p> <p>Description</p> <p>Indicates whether to enable fully customizable extensions to contract item prices by ignoring record validations (<code>true</code>) or not (<code>false</code>). Available in API version 64.0 and later.</p>
<code>skipOrgSttPricing</code>	<p>Field Type boolean</p> <p>Description</p> <p>Indicates whether to skip the default pricing procedure and any pricing procedure set for a sales transaction with quote or order type (<code>true</code>) or not (<code>false</code>). To</p>

Field Name	Description
	enable this field, you must enable the enableRevUnifiedSetup field.

Declarative Metadata Sample Definition

Here's an example of a RevenueManagementSettings component.

```
<?xml version="1.0" encoding="UTF-8"?>
<RevenueManagementSettings
xmlns="http://soap.sforce.com/2006/04/metadata">
  <enableCoreCPQ>true</enableCoreCPQ>
  <enableDeltaPricing>true</enableDeltaPricing>
  <enableTransactionProcessor>true</enableTransactionProcessor>
  <enableAutoAddDerivedAsset>true</enableAutoAddDerivedAsset>
  <enableRampDeal>true</enableRampDeal>
  <enableRevUnifiedSetup>true</enableRevUnifiedSetup>
  <groupsEnabled>true</groupsEnabled>
  <enableTransactionCloning>true</enableTransactionCloning>
  <relaxUniqueCipValidation>true</relaxUniqueCipValidation>
  <skipOrgSttPricing>true</skipOrgSttPricing>
  <enableAsIsRenewals>true</enableAsIsRenewals>

  <enableAdvCreateOrdersFromQuote>true</enableAdvCreateOrdersFromQuote>

  <enableAdvancedDetailLinePricing>true</enableAdvancedDetailLinePricing>

  <enableGroupRampPref>true</enableGroupRampPref>
  <hidePriceRefreshNtfcn>true</hidePriceRefreshNtfcn>
</RevenueManagementSettings>
```

This example `package.xml` references the previous definition.

```
<?xml version="1.0" encoding="UTF-8"?>
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
  <types>
    <members>RevenueManagement</members>
    <name>Settings</name>
  </types>
  <version>65.0</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](#).

CHAPTER 3 Product Catalog Management

In this chapter ...

- [Product Catalog Management](#)
- [Product Discovery](#)

Create and manage a product catalog with components, such as attributes, product classifications, simple and bundled products, and rules.

Product Catalog Management

Manage an entire product portfolio with components such as attributes, product classifications, simple and bundled products, and rules.

[Product Catalog Management Standard Objects](#)

The Product Catalog Management data model provides objects and fields to manage products, rules, and catalogs.

[Product Catalog Management Fields on Standard Objects](#)

Product Catalog Management adds standard and custom fields to some standard Salesforce objects. These fields are available only in orgs where Product Catalog Management is enabled. This object is available in API version 60.0 and later.

[Product Catalog Management Business APIs](#)

Use primitive APIs of Product Catalog Management that serve catalog definitions to users or applications.

[Product Catalog Management Metadata API Types](#)

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

[Product Catalog Management Tooling API Objects](#)

Tooling API exposes metadata used in developer tooling that you can access through REST or SOAP. Tooling API's SOQL capabilities for many metadata types allow you to retrieve smaller pieces of metadata.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer** Editions of Revenue Cloud

SEE ALSO:

[Salesforce Help: Product Catalog Management Permission Set Licenses](#)

[Salesforce Help: User Permissions for Product Catalog Management](#)

Product Catalog Management Standard Objects

The Product Catalog Management data model provides objects and fields to manage products, rules, and catalogs.

[AttributeCategory](#)

Represents a logical grouping of attributes that can be reused while defining products. Attribute Categories are used for searching and managing product attributes. For example, the "Mobile Handset Properties" category has color, storage and make model, and size attributes. This object is available in API version 60.0 and later.

[AttributeCategoryAttribute](#)

Represents a relationship between an attribute category and the attribute definition. This object is available in API version 60.0 and later.

[AttrPicklistExcludedValue](#)

Represents the excluded picklist values for a product classification attribute or a product attribute definition. This object is available in API version 61.0 and later.

[ProductAttributeDefinition](#)

Represents the relationship between a product and its attributes. This object is available in API version 60.0 and later.

[ProductCategoryDisqual](#)

Represents disqualification rules for product categories. The rules determine when the product category doesn't qualify to be displayed to users. This object is available in API version 60.0 and later.

[ProductCategoryQualification](#)

Represents qualification rules for product categories. The rules determine when the product category qualifies to be displayed to users. This object is available in API version 60.0 and later.

[ProductClassification](#)

Represents a template that holds a collection of dynamic attributes. Product classification is used to quickly define and create multiple products that are similar yet different. This object is available in API version 60.0 and later.

[ProductClassificationAttr](#)

Represents the relationship between a product classification and its attributes. This is the default configuration for products based on the product classification. This object is available in API version 60.0 and later.

[ProductComponentGrpOverride](#)

Represents override information for a Product Component Group. The cardinality of the product component group can be overridden in the context of a product bundle. This object is available in API version 60.0 and later.

[ProductDisqualification](#)

Represents disqualification rules for products. The rules determine when the product doesn't qualify to be displayed to users. The rules are based on user context. This object is available in API version 60.0 and later.

[ProductQualification](#)

Represents qualification rules for products. The rules determine when the product qualifies to be displayed to users. The rules are based on user context. This object is available in API version 60.0 and later.

[ProductRampSegment](#)

Represents the ramp period within a ramp deal where terms, volumes, and other commitments change over time. This object is available in API version 62.0 and later.

[ProductRelComponentOverride](#)

Represents the cardinality overrides for product components in a bundle. This object is available in API version 60.0 and later.

[ProductSpecificationRecType](#)

Represents the relationship between industry-specific product specifications and the product record type. This object is available in API version 60.0 and later.

[ProductSpecificationType](#)

Represents the type of product specification provided by the user to make the product terminology unique to an industry. A product specification type is associated with a product specification record type. This object is available in API version 60.0 and later.

SEE ALSO:

[Object Reference for the Salesforce Platform: Overview of Salesforce Objects and Fields](#)

[SOAP API Developer Guide: Introduction to SOAP API](#)

AttributeCategory

Represents a logical grouping of attributes that can be reused while defining products. Attribute Categories are used for searching and managing product attributes. For example, the "Mobile Handset Properties" category has color, storage and make model, and size attributes. 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

Product Catalog Management must be enabled to access this object.

Fields

Field	Details
Code	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The unique code for the attribute category. The maximum size is 80 alphanumeric characters. The code can include the following special characters: @ ! - < > * ? + = % # () / \ & ' £ € \$ " .</p>
Description	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The description of the attribute category that's used only during design time.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date the attribute category was last referenced.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date the attribute category was last viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The unique name of the attribute category. The maximum length is 80 characters (of any type).</p>

Field	Details
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The owner of the attribute category. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>

Associated Objects

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

[AttributeCategoryFeed](#) on page 2171

Feed tracking is available for the object.

[AttributeCategoryHistory](#) on page 2178

History is available for tracked fields of the object.

[AttributeCategoryShare](#) on page 2182

Sharing is available for the object.

AttributeCategoryAttribute

Represents a relationship between an attribute category and the attribute definition. 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

Product Catalog Management must be enabled to access this object.

Fields

Field	Details
AttributeCategoryId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The ID of the attribute category that the attribute is associated with. The ID is unique within the organization. This field is a relationship field.</p> <p>Relationship Name AttributeCategory</p> <p>Relationship Type Lookup</p> <p>Refers To AttributeCategory</p>
AttributeDefinitionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The ID of the attribute definition associated with the attribute category. The ID is unique within the organization. This field is a relationship field.</p> <p>Relationship Name AttributeDefinition</p> <p>Relationship Type Lookup</p> <p>Refers To AttributeDefinition</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date the attribute category attribute was last referenced.</p>
LastViewedDate	<p>Type dateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The date the attribute category attribute was last viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description A unique name for the attribute. The maximum length is 80 characters (of any type).</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The owner of the attribute category attribute. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>

Associated Objects

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

[AttributeCategoryAttributeFeed](#) on page 2171

Feed tracking is available for the object.

[AttributeCategoryAttributeHistory](#) on page 2178

History is available for tracked fields of the object.

[AttributeCategoryAttributeShare](#) on page 2182

Sharing is available for the object.

AttrPicklistExcludedValue

Represents the excluded picklist values for a product classification attribute or a product attribute definition. 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

Product Catalog Management must be enabled to access this object.

Fields

Field	Details
AttributeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The ID of the product classification attribute or the product attribute definition of the picklist data type. This field is a polymorphic relationship field.</p> <p>Relationship Name Attribute</p> <p>Relationship Type Lookup</p> <p>Refers To ProductAttributeDefinition, ProductClassificationAttr</p>
AttributePicklistValueId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The ID of the attribute picklist value that's excluded in the product classification attribute or product attribute definition. This field is a relationship field.</p> <p>Relationship Name AttributePicklistValue</p> <p>Relationship Type Lookup</p> <p>Refers To AttributePicklistValue</p>

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date the excluded attribute picklist value was last referenced.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date the excluded attribute picklist value was last viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the excluded attribute picklist value.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The owner of the excluded attribute picklist value. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>

Associated Objects

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

[AttrPicklistExcludedValueFeed](#) on page 2171

Feed tracking is available for the object.

AttrPicklistExcludedValueHistory on page 2178

History is available for tracked fields of the object.

AttrPicklistExcludedValueShare on page 2182

Sharing is available for the object.

ProductAttributeDefinition

Represents the relationship between a product and its attributes. 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

Product Catalog Management must be enabled to access this object.

Fields

Field	Details
AttributeCategoryId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort</p> <p>Description The ID of the attribute category assigned to the parent object. This field is a relationship field.</p> <p>Relationship Name AttributeCategory</p> <p>Relationship Type Lookup</p> <p>Refers To AttributeCategory</p>
AttributeDefinitionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The ID of the attribute associated with the product. This field is a relationship field.</p>

Field	Details
	<p>Relationship Name AttributeDefinition</p> <p>Relationship Type Lookup</p> <p>Refers To AttributeDefinition</p>
AttributeNameOverride	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name to display for the attribute when shown for this object. This display name overrides the name on the attribute. For example, the attribute "Color" is overridden to display as "Laptop Color." The maximum size is 255 alphanumeric characters. The name can include these special characters: @ ! - < > * ? + = % # () / \ & ' £ € \$ " .</p>
DefaultValue	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The default value for the product attribute. The attribute value can be changed. This default overrides the default value set for a picklist for the attribute.</p>
Description	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description A description of the attribute definition. The maximum size is 32,000 alphanumeric characters. The description can include these special characters: @ ! - < > * ? + = % # () / \ & ' £ € \$ " .</p>
DisplayType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The type to display data for the selected data type. Possible values are:</p> <ul style="list-style-type: none"> • <code>CheckBox</code>—Checkbox

Field	Details
	<ul style="list-style-type: none"> • ComboBox—Combobox • Date • Datetime—Date Time • Number • RadioButton—Radio Button • Slider—Available in API version 61.0 and later • Text • Toggle
HelpText	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The help text to display when end users are configuring this attribute. This field overrides the help text defined for the attribute itself.</p>
IsHidden	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates if this product attribute is hidden from end users in the run time (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
IsPriceImpacting	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether this attribute dictates the price of a product (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
IsReadOnly	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the attribute is read-only for users in the run time (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>

Field	Details
IsRequired	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether this attribute requires a value when assigned to a parent object (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date the product attribute was last referenced.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date the product attribute was last viewed.</p>
MaximumCharacterCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The maximum number of characters that can be entered for an attribute value.</p>
MaximumValue	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The maximum value that can be entered as an attribute value.</p>
MinimumCharacterCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The minimum number of characters that can be entered for an attribute value.</p>
MinimumValue	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The minimum value that can be entered as an attribute value.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the product attribute.</p>
OverrideProductAttributeDefinitionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort</p> <p>Description The ID associated with the overridden product attribute definition. This field is a relationship field.</p> <p>Relationship Name OverriddenProductAttributeDefinition</p> <p>Relationship Type Lookup</p> <p>Refers To ProductAttributeDefinition</p>
OverrideContextId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort</p> <p>Description The ID associated with the root product record in a bundle. This field is a polymorphic relationship field.</p> <p>Relationship Name OverrideContext</p>

Field	Details
	<p>Relationship Type Lookup</p> <p>Refers To Product2</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The owner of the product attribute definition. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
Product2Id	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The product ID associated with the product attribute definition. This field is a relationship field.</p> <p>Relationship Name Product2</p> <p>Relationship Type Lookup</p> <p>Refers To Product2</p>
ProductClassificationAttributeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The ID of the attribute assigned to the product classification. This field is a relationship field.</p>

Field	Details
	<p>Relationship Name ProductClassificationAttribute</p> <p>Relationship Type Lookup</p> <p>Refers To ProductClassificationAttr</p>
Sequence	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The display sequence of the attribute when configuring the product during run time.</p>
Status	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The lifecycle state of the product attribute definition. Valid values are:</p> <ul style="list-style-type: none"> • Active • Draft • Inactive <p>The default value is Draft.</p>
StepValue	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The increment or decrement by which a slider's value changes as the user adjusts the product attribute value. Available in API version 61.0 and later.</p>
ValueDescription	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The description of the value assigned to this attribute. This field takes on the value description from the attribute definition.</p>

Associated Objects

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

ProductAttributeDefinitionFeed on page 2171

Feed tracking is available for the object.

ProductAttributeDefinitionHistory on page 2178

History is available for tracked fields of the object.

ProductAttributeDefinitionShare on page 2182

Sharing is available for the object.

ProductCategoryDisqual

Represents disqualification rules for product categories. The rules determine when the product category doesn't qualify to be displayed to users. 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

Product Catalog Management must be enabled to access this object.

Fields

Field	Details
CategoryId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The product category associated with the product disqualification record. This field is a relationship field.</p> <p>Relationship Name Category</p> <p>Relationship Type Lookup</p> <p>Refers To ProductCategory</p>
EffectiveFromDate	<p>Type date</p>

Field	Details
	<p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The date from which the disqualification rule for the product category comes into effect.</p>
EffectiveToDate	<p>Type date</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The date to which the disqualification rule for the product category ceases to be in effect.</p>
IsDisqualified	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates whether the product category is disqualified (<code>true</code>) or not (<code>false</code>) based on the disqualification rules. The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date the product category disqualification record was last referenced.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date the product category disqualification record was last viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the product category disqualification record.</p>

Field	Details
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the owner of the product category disqualification record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
Reason	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The reason to disqualify the product category.</p>

Associated Objects

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

[ProductCategoryDisqualFeed on page 2171](#)

Feed tracking is available for the object.

[ProductCategoryDisqualHistory on page 2178](#)

History is available for tracked fields of the object.

[ProductCategoryDisqualShare on page 2182](#)

Sharing is available for the object.

ProductCategoryQualification

Represents qualification rules for product categories. The rules determine when the product category qualifies to be displayed to users. 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

Product Catalog Management must be enabled to access this object.

Fields

Field	Details
CategoryId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The product category associated with the category qualification record. This field is a relationship field.</p> <p>Relationship Name Category</p> <p>Relationship Type Lookup</p> <p>Refers To ProductCategory</p>
EffectiveFromDate	<p>Type date</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The date from which the qualification rule for the product category comes into effect.</p>
EffectiveToDate	<p>Type date</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The date to which the qualification rule for the product category ceases to be in effect.</p>
IsQualified	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates whether the product category is qualified (<code>true</code>) or not (<code>false</code>) based on the qualification rules. The default value is <code>false</code>.</p>

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date the product category qualification record was last referenced.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date the product category qualification record was last viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the product category qualification record.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the owner of the product category qualification record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>

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.

ProductCategoryQualificationFeed on page 2171

Feed tracking is available for the object.

ProductCategoryQualificationHistory on page 2178

History is available for tracked fields of the object.

ProductCategoryQualificationShare on page 2182

Sharing is available for the object.

ProductClassification

Represents a template that holds a collection of dynamic attributes. Product classification is used to quickly define and create multiple products that are similar yet different. 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

Product Catalog Management must be enabled to access this object.

Fields

Field	Details
Code	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description A unique code for the product classification. The maximum size is 80 alphanumeric characters. The code can include the following special characters: @ ! - < > * ? + = % # () / \ & ' £ € \$ %".</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date the product classification record was last referenced.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date the product classification record was last viewed.</p>

Field	Details
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the product classification. The maximum length is 80 characters (of any type).</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The owner of the product classification. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
Status	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The lifecycle status of the product classification. Possible values are:</p> <ul style="list-style-type: none"> • Active • Draft • Inactive <p>The default value is <code>Draft</code>.</p>

Associated Objects

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

ProductClassificationFeed on page 2171

Feed tracking is available for the object.

ProductClassificationHistory on page 2178

History is available for tracked fields of the object.

Sharing rules are available for the object.

ProductClassificationShare on page 2182

Sharing is available for the object.

ProductClassificationAttr

Represents the relationship between a product classification and its attributes. This is the default configuration for products based on the product classification. 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

Product Catalog Management must be enabled to access this object.

Fields

Field	Details
AttributeCategoryId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort</p> <p>Description The ID of the attribute category assigned to the parent object. This field is a relationship field.</p> <p>Relationship Name AttributeCategory</p> <p>Relationship Type Lookup</p> <p>Refers To AttributeCategory</p>
AttributeDefinitionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The ID of the attribute assigned to the parent object.</p>

Field	Details
	<p>This field is a relationship field.</p> <p>Relationship Name AttributeDefinition</p> <p>Relationship Type Lookup</p> <p>Refers To AttributeDefinition</p>
AttributeNameOverride	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The overridden attribute name to display for the attribute when shown for this object. For example, "Color" overridden to "Laptop Color."</p>
DefaultValue	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The default value of the attribute for a product based on the product classification. This value can be changed.</p>
Description	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The description of this product classification attribute definition.</p>
DisplayType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The type to display data for the selected data type.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • CheckBox—Checkbox • ComboBox—Combobox • Date

Field	Details
	<ul style="list-style-type: none"> • Datetime—Date Time • Number • RadioButton—Radio Button • Slider—Available in API version 61.0 and later • Text • Toggle
ExcludedPicklistValues	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The picklist values excluded from the attribute picklist. This field ensures that the product classification attribute only has valid values.</p>
HelpText	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The help text to display when end users are configuring this attribute. This field overrides the help text defined for the attribute itself.</p>
IsHidden	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates if this product attribute is hidden from end users in the run time (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
IsPriceImpacting	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether this attribute dictates the price of a product (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>

Field	Details
IsReadOnly	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the attribute is read-only for users in the run time (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
IsRequired	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether this attribute requires a value when assigned to a parent object (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date the product classification attribute was last referenced.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date the product classification attribute was last viewed.</p>
MaximumCharacterCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The maximum number of characters that can be entered for an attribute value.</p>
MaximumValue	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The maximum value that can be entered as an attribute value.</p>
MinimumCharacterCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The minimum number of characters that can be entered for an attribute value.</p>
MinimumValue	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The minimum value that can be entered as an attribute value.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the product classification attribute.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the product classification attribute owner. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>

Field	Details
ProductClassificationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The ID of the product classification that the attribute is associated with. This field is unique within your organization. This field is a relationship field.</p> <p>Relationship Name ProductClassification</p> <p>Relationship Type Lookup</p> <p>Refers To ProductClassification</p>
Sequence	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The display sequence of the attribute when configuring the product during run time.</p>
Status	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The lifecycle status of the product classification attribute. Valid values are:</p> <ul style="list-style-type: none"> • Active • Draft • Inactive <p>The default value is <code>Draft</code>.</p>
StepValue	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description</p> <p>The increment or decrement by which a slider's value changes as the user adjusts the product classification attribute value. Available in API version 61.0 and later.</p>
ValueDescription	<p>Type</p> <p>textarea</p> <p>Properties</p> <p>Create, Nillable, Update</p> <p>Description</p> <p>The description of the value assigned to this attribute. This field takes on the value description from the attribute definition.</p>

Associated Objects

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

ProductClassificationAttrFeed on page 2171

Feed tracking is available for the object.

ProductClassificationAttrHistory on page 2178

History is available for tracked fields of the object.

Sharing rules are available for the object.

ProductClassificationAttrShare on page 2182

Sharing is available for the object.

ProductComponentGrpOverride

Represents override information for a Product Component Group. The cardinality of the product component group can be overridden in the context of a product bundle. This object is available in API version 60.0 and later.

Supported Calls

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

Special Access Rules

Product Catalog Management must be enabled to access this object.

Fields

Field	Details
IsExcluded	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the product component group is excluded from the product bundle in the runtime. Excluding a group automatically excludes all child components of the group. The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date the product component override record was last referenced.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date the product component override record was last viewed.</p>
MaxBundleComponents	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The maximum number of components that can be added to a group.</p>
MinBundleComponents	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The minimum number of components that must be added to a group.</p>
Name	<p>Type string</p>

Field	Details
	<p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the overridden product component group.</p>
OverrideContextId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The root bundle product in whose context the group cardinality is overridden. This field is a polymorphic relationship field.</p> <p>Relationship Name OverrideContext</p> <p>Relationship Type Lookup</p> <p>Refers To Product2</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The owner of the product component group override record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
ProductComponentGroupId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The ID of the product component group record. This field is a relationship field.</p>

Field	Details
	Relationship Name ProductComponentGroup
	Relationship Type Lookup
	Refers To ProductComponentGroup

ProductDisqualification

Represents disqualification rules for products. The rules determine when the product doesn't qualify to be displayed to users. The rules are based on user context. 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

Product Catalog Management must be enabled to access this object.

Fields

Field	Details
<code>EffectiveFromDate</code>	Type date
	Properties Create, Filter, Group, Sort, Update
	Description The date from which the disqualification rule for the product comes into effect.
<code>EffectiveToDate</code>	Type date
	Properties Create, Filter, Group, Sort, Update
	Description The date to which the disqualification rule for the product ceases to be in effect.
<code>IsDisqualified</code>	Type boolean

Field	Details
	<p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates whether the product is disqualified based on the disqualification rules (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date the product disqualification record was last referenced.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date the product disqualification record was last viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the product disqualification record.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The owner of the product disqualification record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>

Field	Details
ParentProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the immediate parent product in the product bundle hierarchy. This field is a relationship field.</p> <p>Relationship Name ParentProduct</p> <p>Relationship Type Lookup</p> <p>Refers To Product2</p>
ProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The product for which the disqualification rule is defined. This field is a relationship field.</p> <p>Relationship Name Product</p> <p>Relationship Type Lookup</p> <p>Refers To Product2</p>
Reason	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The reason to disqualify the product.</p>
RootProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the root product in the product bundle hierarchy.</p>

Field	Details
	This field is a relationship field.
	Relationship Name RootProduct
	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.

[ProductDisqualificationFeed on page 2171](#)

Feed tracking is available for the object.

[ProductDisqualificationHistory on page 2178](#)

History is available for tracked fields of the object.

[ProductDisqualificationShare on page 2182](#)

Sharing is available for the object.

ProductQualification

Represents qualification rules for products. The rules determine when the product qualifies to be displayed to users. The rules are based on user context. 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

Product Catalog Management must be enabled to access this object.

Fields

Field	Details
EffectiveFromDate	Type date
	Properties Create, Filter, Group, Sort, Update
	Description The date from which the qualification rule for the product comes into effect.

Field	Details
EffectiveToDate	<p>Type date</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The date to which the qualification rule for the product ceases to be in effect.</p>
IsQualified	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates whether the product is qualified based on the qualification rules (<code>true</code>) or not (<code>false</code>). For a product to qualify, this field should be true. The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date the product qualification record was last referenced.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date the product qualification record was last viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the product qualification record.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description The owner of the product qualification record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
ParentProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the immediate parent product in the product bundle hierarchy. This field is a relationship field.</p> <p>Relationship Name ParentProduct</p> <p>Relationship Type Lookup</p> <p>Refers To Product2</p>
ProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The product for which the qualification rule is defined. This field is a relationship field.</p> <p>Relationship Name Product</p> <p>Relationship Type Lookup</p> <p>Refers To Product2</p>
RootProductId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the root product in the product bundle hierarchy. This field is a relationship field.</p> <p>Relationship Name RootProduct</p> <p>Relationship Type Lookup</p> <p>Refers To Product2</p>

Associated Objects

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

ProductQualificationFeed on page 2171

Feed tracking is available for the object.

ProductQualificationHistory on page 2178

History is available for tracked fields of the object.

ProductQualificationShare on page 2182

Sharing is available for the object.

ProductRampSegment

Represents the ramp period within a ramp deal where terms, volumes, and other commitments change over time. 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

Product Catalog Management must be enabled to access this object.

Fields

Field	Details
DurationType	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The unit of time within which users can try the product for free.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • Days • Months
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date the product ramp segment was last referenced.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date the product ramp segment was last viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the product ramp segment.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the owner of the product ramp segment. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>

Field	Details
ProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The ID of the product associated with the product ramp segment. This field is a relationship field.</p> <p>Relationship Name Product</p> <p>Refers To Product2</p>
ProductSellingModelId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The ID of the product selling model associated with the product ramp segment. This field is a relationship field.</p> <p>Relationship Name ProductSellingModel</p> <p>Refers To ProductSellingModel</p>
SegmentType	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The time duration within the ramp deal where specific terms, volumes, and commitments are applied to the subscription product. Valid values are:</p> <ul style="list-style-type: none"> • Custom • FreeTrial • Yearly <p>The default value is Yearly.</p>
TrialDuration	<p>Type int</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The duration within which users can try the product for free.</p>

Associated Objects

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

[ProductRampSegmentFeed](#) on page 2171

Feed tracking is available for the object.

[ProductRampSegmentHistory](#) on page 2178

History is available for tracked fields of the object.

[ProductRampSegmentShare](#) on page 2182

Sharing is available for the object.

ProductRelComponentOverride

Represents the cardinality overrides for product components in a bundle. 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

Product Catalog Management must be enabled to access this object.

Fields

Field	Details
DoesBundlePriceIncludeChild	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the bundle price includes the associated child component's price (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>

Field	Details
IsComponentRequired	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the component is a required component in the product bundle. The default value is <code>false</code>.</p>
IsDefaultComponent	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether this component is included in the product component group by default. The default value is <code>false</code>.</p>
IsExcluded	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the bundle excludes the component (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
IsQuantityEditable	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the product component quantity can be edited (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date the product related component override record was last referenced.</p>
LastViewedDate	<p>Type dateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The date the product related component override record was last viewed.</p>
MaxQuantity	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The maximum quantity for the product component in the product bundle.</p>
MinQuantity	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The minimum quantity for the product component in the product bundle</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the product related component override. The maximum length is 255 characters (of any type).</p>
OverrideContextId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The ID associated with the root product in a bundle. This field is a polymorphic relationship field.</p> <p>Relationship Name OverrideContext</p> <p>Relationship Type Lookup</p> <p>Refers To Product2</p>

Field	Details
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The owner ID of the product related component override record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
ProductRelatedComponentId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The ID associated with the product related component record. This field is a relationship field.</p> <p>Relationship Name ProductRelatedComponent</p> <p>Relationship Type Lookup</p> <p>Refers To ProductRelatedComponent</p>
Quantity	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The default number of child product related components.</p>
QuantityScaleMethod	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p>

Field	Details
	<p>Description</p> <p>The scaling method that determines how the child product quantity changes as the quantity of the parent product changes in the runtime cart.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Constant • Proportional <p>The default value is <code>Proportional</code>.</p>

Associated Objects

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

[ProductRelComponentOverrideFeed on page 2171](#)

Feed tracking is available for the object.

[ProductRelComponentOverrideHistory on page 2178](#)

History is available for tracked fields of the object.

[ProductRelComponentOverrideShare on page 2182](#)

Sharing is available for the object.

ProductSpecificationRecType

Represents the relationship between industry-specific product specifications and the product record type. This object is available in API version 60.0 and later.

Supported Calls

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

Special Access Rules

Product Catalog Management must be enabled to access this object.

Fields

Field	Details
DeveloperName	<p>Type</p> <p>string</p> <p>Properties</p> <p>Create, Filter, Group, Sort, Update</p> <p>Description</p> <p>The unique name of the ProductSpecificationRecType object in the API. The name:</p>

Field	Details
	<ul style="list-style-type: none"> • must be 40 characters or fewer. • can contain only underscores and alphanumeric characters. • must begin with a letter. • can contain only underscores and alphanumeric characters. • can't include spaces • can't end with an underscore • can't contain 2 consecutive underscores
IsCommercial	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the product is sold commercially (<code>true</code>) or not (<code>false</code>)</p>
Language	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The combined language and locale ISO code, which controls the language of the Product Specification Record Type. Possible values are:</p> <ul style="list-style-type: none"> • <code>da</code>—Danish • <code>de</code>—German • <code>en_US</code>—English • <code>es</code>—Spanish • <code>es_MX</code>—Spanish (Mexico) • <code>fi</code>—Finnish • <code>fr</code>—French • <code>it</code>—Italian • <code>ja</code>—Japanese • <code>ko</code>—Korean • <code>nl_NL</code>—Dutch • <code>no</code>—Norwegian • <code>pt_BR</code>—Portuguese (Brazil) • <code>ru</code>—Russian • <code>sv</code>—Swedish • <code>th</code>—Thai

Field	Details
	<ul style="list-style-type: none"> zh_CN—Chinese (Simplified) zh_TW—Chinese (Traditional)
MasterLabel	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Label for this Product Specification Record Type value. This display value is the internal label that doesn't get translated.</p>
NamespacePrefix	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The namespace prefix that is associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix. Limit: 15 characters. You can refer to a component in a managed package by using the <i>namespacePrefix_componentName</i></p> <p>The namespace prefix can have one of the following values.</p> <ul style="list-style-type: none"> In Developer Edition orgs, <code>NamespacePrefix</code> is set to the namespace prefix of the org for all objects that support it, unless an object is in an installed managed package. In that case, the object has the namespace prefix of the installed managed package. This field's value is the namespace prefix of the Developer Edition org of the package developer. In orgs that aren't Developer Edition orgs, <code>NamespacePrefix</code> is set only for objects that are part of an installed managed package. All other objects have no namespace prefix.
ProductSpecificationType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The product specification type that's associated with the record type.</p>
RecordTypeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description The ID of the record type that's associated with the product specification type. This field is a relationship field.</p> <p>Relationship Name RecordType</p> <p>Relationship Type Lookup</p> <p>Refers To RecordType</p>

ProductSpecificationType

Represents the type of product specification provided by the user to make the product terminology unique to an industry. A product specification type is associated with a product specification record type. This object is available in API version 60.0 and later.

Supported Calls

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

Special Access Rules

Product Catalog Management must be enabled to access this object.

Fields

Field	Details
Description	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The description of the Product Specification Type.</p>
DeveloperName	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The unique name of the Product Specification Type object in the API. The name:</p> <ul style="list-style-type: none"> • must be 40 characters or fewer. • can contain only underscores and alphanumeric characters.

Field	Details
	<ul style="list-style-type: none"> • must begin with a letter. • can contain only underscores and alphanumeric characters. • can't include spaces • can't end with an underscore • can't contain 2 consecutive underscores <p>In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization.</p>
Language	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The combined language and locale ISO code, which controls the language of the Product Specification Type.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • da—Danish • de—German • en_US—English • es—Spanish • es_MX—Spanish (Mexico) • fi—Finnish • fr—French • it—Italian • ja—Japanese • ko—Korean • nl_NL—Dutch • no—Norwegian • pt_BR—Portuguese (Brazil) • ru—Russian • sv—Swedish • th—Thai • zh_CN—Chinese (Simplified) • zh_TW—Chinese (Traditional)
MasterLabel	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description</p> <p>Label for this Product Specification Type value. This display value is the internal label that doesn't get translated.</p>
NamespacePrefix	<p>Type</p> <p>string</p> <p>Properties</p> <p>Filter, Group, Nillable, Sort</p> <p>Description</p> <p>The namespace prefix that is associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix. Limit: 15 characters. You can refer to a component in a managed package by using the <i>namespacePrefix_componentName</i></p> <p>The namespace prefix can have one of the following values.</p> <ul style="list-style-type: none"> In Developer Edition orgs, <code>NamespacePrefix</code> is set to the namespace prefix of the org for all objects that support it, unless an object is in an installed managed package. In that case, the object has the namespace prefix of the installed managed package. This field's value is the namespace prefix of the Developer Edition org of the package developer. In orgs that aren't Developer Edition orgs, <code>NamespacePrefix</code> is set only for objects that are part of an installed managed package. All other objects have no namespace prefix.

Product Catalog Management Fields on Standard Objects

Product Catalog Management adds standard and custom fields to some standard Salesforce objects. These fields are available only in orgs where Product Catalog Management is enabled. This object is available in API version 60.0 and later.

[Product Catalog Management Fields on Attribute Definition](#)

Standard and custom fields extend the standard Attribute Definition object for use in Product Catalog Management.

[Product Catalog Management Fields on Product2](#)

Standard and custom fields extend the standard Product2 object for use in Product Catalog Management to represent information about products.

[Product Catalog Management Fields on Product Catalog](#)

Standard and custom fields extend the standard Product Catalog object for use in Product Catalog Management. This object is available in API version 60.0 and later.

[Product Catalog Management Fields on Product Category](#)

Standard and custom fields extend the standard Product Category object for use in Product Catalog Management.

[Product Catalog Management Fields on Product Component Group](#)

Standard and custom fields extend the standard Product Component Group object for use in Product Catalog Management.

[Product Catalog Management Fields on Product Related Component](#)

Standard and custom fields extend the standard Product Related Component object for use in Product Catalog Management.

[Product Catalog Management Fields on Product Relationship Type](#)

Standard and custom fields extend the standard Product Relationship Type object for use in Product Catalog Management.

[Product Catalog Management Fields on Product Selling Model Option](#)

Standard and custom fields extend the standard Product Selling Model Option object for use in Product Catalog Management. This object is available in API version 60.0 and later.

Product Catalog Management Fields on Attribute Definition

Standard and custom fields extend the standard Attribute Definition object for use in Product Catalog Management.

Fields

Field	Details
DataType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort</p> <p>Description The data type of the attribute definition. Valid values are:</p> <ul style="list-style-type: none"> • <code>Checkbox</code> • <code>Currency</code>—Available in API version 61.0 and later • <code>Date</code> • <code>Datetime</code> • <code>Number</code> • <code>Percent</code>—Available in API version 61.0 and later • <code>Picklist</code> • <code>Text</code>

SEE ALSO:

[Attribute Definition](#)

Product Catalog Management Fields on Product2

Standard and custom fields extend the standard Product2 object for use in Product Catalog Management to represent information about products.

Fields

Field	Details
Based On	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the product classification from which this product inherits. This field is a relationship field.</p> <p>Relationship Name BasedOn</p> <p>Relationship Type Lookup</p> <p>Refers To ProductClassification</p>
Help Text	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The help text that appears at runtime for the product. The maximum size is 32,000 alphanumeric characters. The help text can include these special characters: @ ! - < > * ? + = % # () / \ & ' £ € \$ " .</p>
Availability Date	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date when the product is available.</p>
CanRamp	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates whether the product's terms, volumes, and other commitments can be ramped (true) at run time or not (false) The default value is <code>false</code>.</p>

Field	Details
Discontinued Date	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date when the product is discontinued.</p>
End Of Life Date	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time after which a product isn't supported, ordered, or maintained.</p>
Specification Type	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The type of product specification that's being created.</p>
DecompositionScope	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The number of fulfillment order line items that must be generated. Available in API version 61.0 and later. Valid values are:</p> <ul style="list-style-type: none"> • Account • Bundle • Order • OrderLineItem
FulfillmentQtyCalcMethod	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Determines whether the quantity of fulfillment order line items must always be one or must be aggregated from the source line items. Available in API version 61.0 and later.</p>

Field	Details
	<p>Valid values are:</p> <ul style="list-style-type: none"> Aggregate AlwaysOne
UsageModelType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The type of usage model for a product or service. Anchor is the main subscription product or service. Pack is the add-on product or service that grants additional usage resources for consumption. Available in API version 62.0 and later.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> Anchor Pack

SEE ALSO:

[Product2](#)

Product Catalog Management Fields on Product Catalog

Standard and custom fields extend the standard Product Catalog object for use in Product Catalog Management. This object is available in API version 60.0 and later.

Fields

Field	Details
Code	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description A unique ID associated with the catalog. The maximum size is 80 alphanumeric characters.</p>
Description	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p>

Field	Details
	<p>Description</p> <p>The description of the catalog that's used during design time. The maximum size is 255 alphanumeric characters.</p>
EffectiveEndDate	<p>Type</p> <p>dateTime</p> <p>Properties</p> <p>Create, Filter, Nillable, Sort, Update</p> <p>Description</p> <p>The date after which the product catalog is unavailable to end users.</p>
EffectiveStartDate	<p>Type</p> <p>dateTime</p> <p>Properties</p> <p>Create, Filter, Nillable, Sort, Update</p> <p>Description</p> <p>The date on which the product catalog is available to end users.</p>
CatalogType	<p>Type</p> <p>picklist</p> <p>Properties</p> <p>Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description</p> <p>The category of an entry in the catalog.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Sales • ServiceProcess—Service Process <p>The default value is Sales.</p>

SEE ALSO:

[Product Catalog](#)

Product Catalog Management Fields on Product Category

Standard and custom fields extend the standard Product Category object for use in Product Catalog Management.

Fields

Field	Details
Code	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description A unique ID associated with the catalog. The maximum size is 80 alphanumeric characters.</p>
IsNavigational	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the category or subcategory is shown in the menu as a navigational breadcrumb (<code>true</code>) or not (<code>false</code>). Available in API version 62.0 and later. The default value is <code>false</code>.</p>

SEE ALSO:

[Product Category](#)

Product Catalog Management Fields on Product Component Group

Standard and custom fields extend the standard Product Component Group object for use in Product Catalog Management.

Fields

Field	Details
ParentGroupId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The parent product component group in a nested group hierarchy for the same parent product. Available in API version 62.0 and later. This field is a relationship field.</p> <p>Relationship Name ParentGroup</p>

Field	Details
	Refers To ProductComponentGroup

SEE ALSO:

[Product Component Group](#)

Product Catalog Management Fields on Product Related Component

Standard and custom fields extend the standard Product Related Component object for use in Product Catalog Management.

Fields

Field	Details
ChildProductClassificationId	Type reference
	Properties Create, Filter, Group, Nillable, Sort
	Description The child product classification that's associated with a product. This field is a relationship field.
	Relationship Name ChildProductClassification
	Refers To ProductClassification
QuoteVisibility	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description Specifies the product-related component to display as a quote line item in the Transaction Line Editor and the quote document. The default value is Always. Possible values are: <ul style="list-style-type: none"> • Always • Transaction Line Editor Only • Quote Document Only

Field	Details
	<ul style="list-style-type: none"> Never

SEE ALSO:

[Product Related Component](#)

Product Catalog Management Fields on Product Relationship Type

Standard and custom fields extend the standard Product Relationship Type object for use in Product Catalog Management.

Fields

Field	Details
AssociatedProductRoleCat	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description The role that the associated component plays in the relationship. Valid values are:</p> <ul style="list-style-type: none"> BundleComponent— The associated product is part of a bundle. ClassificationComponent— The associated component is a product classification. Available in API version 61.0 and later

SEE ALSO:

[Product Relationship Type](#)

Product Catalog Management Fields on Product Selling Model Option

Standard and custom fields extend the standard Product Selling Model Option object for use in Product Catalog Management. This object is available in API version 60.0 and later.

Fields

Field	Details
IsDefault	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description</p> <p>Indicates the default product selling model for a product. Setting a product selling model as default is optional. A product can only have one default product selling model.</p> <p>The default value is <code>false</code>.</p>

SEE ALSO:

[Product Selling Model Option](#)

Product Catalog Management Business APIs

Use primitive APIs of Product Catalog Management that serve catalog definitions to users or applications.

This table lists the available Product Catalog Management resources.

Resource	Description
/connect/pcm/catalogs (POST)	Retrieve, search, filter, or sort catalog records.
/connect/pcm/catalogs/<i>catalogId</i> (GET)	Retrieve details of catalog records based on a catalog ID.
/connect/pcm/catalogs/<i>catalogId</i>/categories (GET)	Retrieve the root-level categories of a catalog based on a catalog ID, or subcategories based on a parent category. You can also search, filter, or sort the categories.
/connect/pcm/categories/<i>categoryId</i> (GET)	Retrieve details of individual category records based on a category ID.
/connect/pcm/products (POST)	Retrieve products. You can also search, filter, or sort the products.
/connect/pcm/products/<i>productId</i> (GET)	Retrieve details of individual product records or a bundle based on a product ID.
/connect/pcm/products/bulk (POST)	Retrieve details for multiple products.
/connect/pcm/index/configurations (GET, PUT)	Retrieve the saved index configurations. Additionally, you can persist the index configuration.

Resource	Description
/connect/pcm/relatedRecords/<i>entityName</i> (POST)	Retrieve related ProductRampSegment or ProductUsageGrant records for Product2 object.
/connect/pcm/index/snapshots (GET)	Retrieve the created snapshots and snapshot indexes.
/connect/pcm/index/deploy (POST)	Create indexes for a snapshot. Indexes improve search results and make it easier to find products at run time through search terms.
/connect/pcm/index/setting (GET, PATCH)	Fetch and update settings related to indexing and search.
/connect/pcm/index/error (GET)	Get the count and details of the errors that occurred during the indexing process.
/connect/pcm/deep-clone (POST)	Copy related records of an object along with the main product record.
/connect/pcm/unit-of-measure/info (GET)	Get details about the unit of measure for a specific set of records.
/connect/pcm/unit-of-measure/rounded-data (POST)	Round off and scale decimal data for a specific set of fields.

[Resources](#)

Learn more about the available Product Catalog Management API resources.

[Request Bodies](#)

Learn more about the available Product Catalog Management API request bodies.

[Response Bodies](#)

Learn more about the available Product Catalog Management API response bodies.

SEE ALSO:

[Connect REST API Developer Guide: Introduction](#)

Resources

Learn more about the available Product Catalog Management API resources.

[Bulk Product Details \(POST\)](#)

Retrieve details for multiple products.

[Catalog List \(POST\)](#)

Retrieve, search, filter, or sort catalog records.

[Catalog By ID \(GET\)](#)

Retrieve details of catalog records based on a catalog ID.

[Categories List \(GET\)](#)

Retrieve the root-level categories of a catalog based on a catalog ID, or subcategories based on a parent category. You can also search, filter, or sort the categories.

[Category By ID \(GET\)](#)

Retrieve details of individual category records based on a category ID.

[Deep Clone \(POST\)](#)

Copy related records of an object along with the main product record.

[Index Configuration Collection \(GET, PUT\)](#)

Retrieve the saved index configurations. Additionally, you can persist the index configuration.

[Index Setting \(GET, PATCH\)](#)

Fetch and update settings related to indexing and search.

[Product Details \(GET\)](#)

Retrieve details of individual product records or a bundle based on a product ID.

[Product Related Records List \(POST\)](#)

Retrieve related ProductRampSegment or ProductUsageGrant records for Product2 object.

[Products List \(POST\)](#)

Retrieve products. You can also search, filter, or sort the products.

[Snapshot Collection \(GET\)](#)

Retrieve the created snapshots and snapshot indexes.

[Snapshot Deployment \(POST\)](#)

Create indexes for a snapshot. Indexes improve search results and make it easier to find products at run time through search terms.

[Snapshot Index Error \(GET\)](#)

Get the count and details of the errors that occurred during the indexing process.

[Unit of Measure Info \(GET\)](#)

Get details about the unit of measure for a specific set of records.

[Unit of Measure Rounded Data \(POST\)](#)

Round off and scale decimal data for a specific set of fields.

Bulk Product Details (POST)

Retrieve details for multiple products.

Resource

```
/connect/pcm/products/bulk
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/pcm/products/bulk
```

Available version

61.0

HTTP methods

POST

Request body for POST**JSON example**

```
{
  "correlationId": "cbfabffb-093f-45b3-8c2d-88b4acbd4867",
  "productIds": [
    "01tT1000000F0afIAC",
    "01tT1000000F0afIAC"
  ],
  "uptoLevel": 1,
  "language": "french",
  "additionalFields": {
    "Product2": {
      "fields": [
        "code__c"
      ]
    },
    "ProductAttributeDefinition": {
      "fields": [
        "scope"
      ]
    }
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
additional Fields	Map<String, Additional Fields Input >	Map of object and list of additional standard or custom fields to be included in the response. The supported objects are: <ul style="list-style-type: none"> Product2 ProductAttributeDefinition—If the fields defined for the ProductAttributeDefinition object aren't available for the ProductClassificationAttr object, then the API request fails. 	Optional	61.0

Name	Type	Description	Required or Optional	Available Version
correlationId	String	Unique token to track and associate related events or transactions across different components of the application. If unspecified, a Universally Unique Identifier (UUID) is generated.	Optional	61.0
language	String	Custom language that you can specify to get translated data for the fields of an object that's enabled for translation. See Translate Product and Product Category Data .	Optional	64.0
productIds	String[]	List of product IDs that details must be returned for. If any product ID is blank, invalid, or not found, then the request is processed with valid and available product IDs.	Required	61.0
uptoLevel	Integer	Hierarchy level to follow to return the product details. For a bundle, this property determines the number of levels of child components to be returned. You can specify up to a hierarchy level of 1. If unspecified, the default level is the full bundle hierarchy.	Optional	61.0

Response body for POST[Products Output](#)**Catalog List (POST)**

Retrieve, search, filter, or sort catalog records.

Resource`/connect/pcm/catalogs`**Resource example**`https://yourInstance.salesforce.com/services/data/v65.0/connect/pcm/catalogs`**Available version**


60.0

Requires Chatter

No

HTTP methods

POST

 **Note:** The POST method is used to retrieve the catalog records instead of the GET method as a request payload is sent to filter the records.

Request body for POST

JSON example

This example shows how to retrieve catalogs that contain `apple` in the catalog name.

```
{
  "pageSize": 100,
  "offset": 0,
  "language": "french",
  "filter": {
    "criteria": [
      {
        "property": "name",
        "operator": "contains",
        "value": "apple"
      }
    ]
  }
}
```

This example shows how to retrieve catalogs with `ServiceProcess` as the catalog type.

```
{
  "pageSize": 100,
  "offset": 0,
  "sort": {
    "orders": [
      {
        "property": "name",
        "direction": "desc"
      }
    ]
  },
  "filter": {
    "criteria": [
      {
        "property": "catalogType",
        "operator": "eq",
        "value": "ServiceProcess"
      }
    ]
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
correlation Id	String	Unique token to track and associate related events or transactions across different components of the application. If unspecified, a Universally Unique Identifier (UUID) is generated.	Optional	60.0
filter	Filter	Criteria to filter the records. Filters are applicable to the fields of the ProductCatalog object. The supported operators are: <ul style="list-style-type: none"> • eq • in • contains The supported properties are name and catalogType.	Optional	60.0
language	String	Custom language that you can specify to get translated data for the fields of an object that's enabled for translation. See Translate Product and Product Category Data .	Optional	64.0
offset	Integer	Number of records to skip. The default value is 0.	Optional	60.0
pageSize	Integer	Number of records per page. Valid values are from 1 through 100. If unspecified, defaults to 100.	Optional	60.0
sort	Sort	Sort order of the catalog records. The supported operators are: <ul style="list-style-type: none"> • asc • desc 	Optional	60.0

Response body for POST[Catalogs Output](#)**Catalog By ID (GET)**

Retrieve details of catalog records based on a catalog ID.

Resource

```
/connect/pcm/catalogs/catalogId
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/pcm/catalogs/OZST100000000kUOAG
```

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/pcm/catalogs/OZST100000000kUOAG?language=spanish
```

Available version

60.0

Requires Chatter

No

HTTP methods

GET

Request parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
correlationId	String	Unique token to track and associate related events or transactions across different components of the application. If unspecified, a Universally Unique Identifier (UUID) is generated.	Optional	60.0
fields	String[]	For internal use only.	Optional	60.0
language	String	Custom language that you can specify to get translated data for the fields of an object that's enabled for translation. See Translate Product and Product Category Data .	Optional	64.0

Response body for GET

[Catalogs Output](#)

Categories List (GET)

Retrieve the root-level categories of a catalog based on a catalog ID, or subcategories based on a parent category. You can also search, filter, or sort the categories.

Resource

```
/connect/pcm/catalogs/catalogId/categories
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/pcm/catalogs/OZST100000000kUOAG/categories
```

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/pcm/catalogs/OZST100000000kUOAG/categories?language=spanish
```

Available version

60.0

Requires Chatter

No

HTTP methods

GET

Request parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
correlationId	String	Unique token to track and associate related events or transactions across different components of the application. If unspecified, a Universally Unique Identifier (UUID) is generated.	Optional	60.0
depth	Integer	Number of levels in the category hierarchy to return. The default value is 1.	Optional	60.0
fields	String[]	For internal use only.	Optional	60.0
language	String	Custom language that you can specify to get translated data for the fields of an object that's enabled for translation. See Translate Product and Product Category Data .	Optional	64.0
parent CategoryId	String	ID of the category to fetch the associated hierarchy of subcategories. If unspecified, then the root-level categories are returned.	Optional	60.0

Response body for GET[Categories Output](#)**Category By ID (GET)**

Retrieve details of individual category records based on a category ID.

Resource

```
/connect/pcm/categories/categoryId
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/pcm/categories/OZGT10000000qqOAA
```

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/pcm/categories/OZGT10000000qqOAA?language=spanish
```

Available version

60.0

Requires Chatter

No

HTTP methods

GET

Request parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
correlationId	String	Unique token to track and associate related events or transactions across different components of the application. If unspecified, a Universally Unique Identifier (UUID) is generated.	Optional	60.0
fields	String[]	For internal use only.	Optional	60.0
language	String	Custom language that you can specify to get translated data for the fields of an object that's enabled for translation. See Translate Product and Product Category Data .	Optional	64.0

Response body for GET[Categories Output](#)**Deep Clone (POST)**

Copy related records of an object along with the main product record.

Resource`/connect/pcm/deep-clone`**Resource example**`https://yourInstance.salesforce.com/services/data/v65.0/connect/pcm/deep-clone`**Available version**

63.0

HTTP methods

POST

Request body for POST**JSON example**

```
{
  "mainRecordId": "01tSG0000028kcSYAQ",
  "mainObjectApiName": "Product2",
  "mainRecordFieldValues": {
    "Name": "New Cloud Storage"
  }
}
```

```
}
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
mainObject ApiName	String	API name of the object. The supported object is Product2.	Required	63.0
mainRecord FieldValues	Map<String, String>	Mapping of the API name of the field to its value. The values passed through this map are set for the created record. You can pass the Name field only through this map.	Optional	63.0
mainRecordId	String	ID of the record.	Required	63.0

Response body for POST

[Deep Clone Response](#)

Index Configuration Collection (GET, PUT)

Retrieve the saved index configurations. Additionally, you can persist the index configuration.

Resource

```
/connect/pcm/index/configurations
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/pcm/index/configurations
```

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/pcm/index/configurations?includeMetadata=false&fieldTypes=Standard,Custom
```

Available version

62.0

HTTP methods

GET, PUT

Request parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
correlationId	String	Unique token to track and associate related events or transactions across different components of the application. If unspecified, a Universally Unique Identifier (UUID) is generated.	Optional	62.0

Parameter Name	Type	Description	Required or Optional	Available Version
fieldTypes	String[]	Filters and returns only the persisted index configurations, based on the index configuration type specified in the query parameters. The supported types of filters are: <ul style="list-style-type: none"> • STANDARD • CUSTOM • ProductDynamicAttribute • ProductAttributeDefinitionStandard • ProductAttributeDefinitionCustom 	Optional	62.0
include Metadata	Boolean	Indicates whether to include metadata (true) or not (false).	Optional	62.0

Response body for GET[Index Configuration Collection](#)**Request body for PUT****JSON example**

```
{
  "correlationId": "8545b5aa-f3e6-429a-8f21-9cc4ce50b1d7",
  "indexConfigurations": [
    {
      "attributeDefinitionId": "0tjT1000000002bIAA",
      "name": "Color",
      "type": "ProductDynamicAttribute",
      "isSearchable": true
    },
    {
      "attributeFieldId": "00Nxx000001FwnABII",
      "name": "Message__c",
      "type": "Custom",
      "isSearchable": true
    },
    {
      "name": "Code",
      "type": "Standard",
      "isSearchable": true
    },
    {
      "facetDisplayRank": 1,
      "isFacetable": false,
      "isSearchable": true,
      "name": "Family",
      "type": "Standard"
    }
  ]
}
```

```

    ]
  }

```

Properties

Name	Type	Description	Required or Optional	Available Version
correlationId	String	Unique token to track and associate related events or transactions across different components of the application. If unspecified, a Universally Unique Identifier (UUID) is generated.	Optional	62.0
index Configurations	Index Configuration Input[]	List of index configurations.	Required	62.0

Response body for PUT

[Index Configurations Update](#)

Index Setting (GET, PATCH)

Fetch and update settings related to indexing and search.

Resource

```
/connect/pcm/index/setting
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/pcm/index/setting
```

Available version

63.0

HTTP methods

GET, PATCH

Response body for GET

[Index Setting Results](#)

Request body for PATCH**JSON example**

```

{
  "setting" : {
    "supportedLanguages" : ["en_US", "ja", "es", "nl_NL"],
    "defaultLanguage" : "en_US",
    "productsGrouping": "GROUPING_VARIATION"
  }
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
setting	Setting Input[]	Object containing the setting-related details.	Required	63.0

Request parameters for PATCH

Parameter Name	Type	Description	Required or Optional	Available Version
settingId	String	ID of the setting to update the details for.	Required	63.0

Response body for PATCH

[Index Setting Update](#)

Product Details (GET)

Retrieve details of individual product records or a bundle based on a product ID.

Resource

```
/connect/pcm/products/productId
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/pcm/products/01tT1000000F0aFIAC
```

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/pcm/products/01tT1000000F0aFIAC?language=spanish
```

Available version


60.0

Requires Chatter

No

HTTP methods

GET

 **Note:** You must invoke this API request by using GET method only. If the request is invoked by using POST method, the request is considered as a [Products List](#) API request.

Request parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
correlationId	String	Unique token to track and associate related events or transactions across different components of the application. If	Optional	60.0

Parameter Name	Type	Description	Required or Optional	Available Version
		unspecified, a Universally Unique Identifier (UUID) is generated.		
fields	String[]	For internal use only.	Optional	60.0
language	String	Custom language that you can specify to get translated data for the fields of an object that's enabled for translation. See Translate Product and Product Category Data .	Optional	64.0

Response body for GET[Products](#)**Product Related Records List (POST)**

Retrieve related ProductRampSegment or ProductUsageGrant records for Product2 object.

Resource

```
/connect/pcm/relatedRecords/entityName
```

The supported entity or object is Product2.

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/pcm/relatedRecords/product2
```

Available version

62.0

HTTP methods

POST



Note: POST methods typically create an item, but for this resource POST is used to retrieve information.

Request body for POST**JSON example**

```
{
  "recordIds": [
    "01txx0000006i44AAA",
    "01txx0000006i5gAAA"
  ],
  "relatedObjectNodes": [
    {
      "relatedObjectAPIName": "ProductRampSegment",
      "pageSize": 20,
      "offset": 0
    },
    {
      "relatedObjectAPIName": "ProductUsageGrant",

```

```

    "pageSize": 10,
    "offset": 0,
    "filter": {
      "criteria": [
        {
          "property": "status",
          "operator": "eq",
          "value": "active"
        },
        {
          "property": "effectivestartdate",
          "operator": "lte",
          "value": "2024-06-25"
        },
        {
          "criteriaType": "CustomWhereCondition",
          "value": "(effectiveenddate = null OR effectiveenddate >= 2024-06-25)"
        }
      ]
    }
  ]
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
correlation Id	String	Unique token to track and associate related events or transactions across different components of the application. If unspecified, a Universally Unique Identifier (UUID) is generated.	Optional	62.0
recordIds	String[]	List of record IDs to return the relatedObjects records for. The maximum number of record IDs supported is 20.	Required	62.0
related ObjectNodes	Related Object Node Input[]	List of nodes for the related objects. The maximum number of related object nodes supported is two.	Required	62.0

Response body for POST

[Related Records List](#)

Products List (POST)

Retrieve products. You can also search, filter, or sort the products.

Resource

```
/connect/pcm/products
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/pcm/products?productClassificationId=11BT10000004C9SMAU
```

Available version

60.0

Requires Chatter

No

HTTP methods

POST



Note: POST methods typically create an item, but for this resource POST is used to retrieve information.

Request body for POST**JSON example**

This example is a search request for products that contain `Bundle Product` in the product name.

```
{
  "catalogIds": [
    "0ZST10000004D03OAE"
  ],
  "language": "spanish",
  "filter": {
    "criteria": [
      {
        "property": "name",
        "operator": "contains",
        "value": "Bundle Product"
      }
    ]
  },
  "relatedObjectFilters": [
    {
      "objectName": "ProductSpecificationRecType",
      "criteria": [
        {
          "property": "IsCommercial",
          "operator": "eq",
          "value": false
        }
      ]
    }
  ],
  "additionalFields": {
    "Product2": {
      "fields": [
        "code__c"
      ]
    }
  }
}
```


This example is a search request for products that contain the specified search term in the product name and are part of a catalog.

```
{
  "catalogIds": [
    "0ZSDU0000002Og54AE"
  ],
  "searchTerm": "Slack"
}
```

Query parameters

Name	Type	Description	Required or Optional	Available Version
product Classification Id	String	ID of the product classification template that contains a collection of dynamic attributes and can be reused to create multiple products. Products that are based on a product classification inherit all the attributes of the product classification. Specify either the product classification ID, list of category IDs, or list of catalog IDs to retrieve products.	Optional	60.0

Properties

Name	Type	Description	Required or Optional	Available Version
additional Fields	Map<String, Additional Fields Input >	Map of the object and the list of standard and custom fields to be queried along with the standard response. The supported object is Product2.	Optional	61.0
catalogIds	List<String>	List of comma-separated catalog IDs. The API returns the list of product records that are associated with the specified catalog IDs. Specify either the product classification ID, list of category IDs, or list of catalog IDs to retrieve products.	Optional	60.0
categoryIds	List<String>	List of comma-separated category IDs. The API returns the list of product records that are associated with the specified category IDs. If unspecified, then returns	Optional	60.0

Name	Type	Description	Required or Optional	Available Version
		<p>all products that are added to at least one category.</p> <p>Specify either the product classification ID, list of category IDs, or list of catalog IDs to retrieve products.</p>		
correlation Id	String	<p>Unique token to track and associate related events or transactions across different components of the application. If unspecified, a Universally Unique Identifier (UUID) is generated.</p>	Optional	60.0
filter	Criteria Input	<p>Criteria to filter the records. Filters are applicable to the fields of Product2 object. The supported operators are:</p> <ul style="list-style-type: none"> • <code>eq</code> • <code>in</code> • <code>contains</code>—This value isn't applicable if the Use Indexed Data For Product Listing and Search toggle from the Product Discovery Settings page from Setup is enabled. • <code>gt</code>—Specifies a greater than criteria. Available from API version 63.0 and later for Number, Date, and Datetime data types only. • <code>lt</code>—Specifies a less than criteria. Available from API version 63.0 and later for Number, Date, and Datetime data types only. • <code>gte</code>—Specifies a greater than or equal to criteria. Available from API version 63.0 and later for Number, Date, and Datetime data types only. • <code>lte</code>—Specifies a less than or equal to criteria. Available from API version 63.0 and later for Number, Date, and Datetime data types only. <p>If multiple criteria are specified, then the criteria are combined by using the <code>and</code> operator.</p> <p>The supported properties are <code>name</code>, <code>description</code>, and <code>isActive</code>. If the Use Indexed Data For Product</p>	Optional	60.0

Name	Type	Description	Required or Optional	Available Version
		Listing and Search toggle from the Product Discovery Settings page from Setup is enabled, then the supported property is <code>name</code> only.		
<code>language</code>	String	Custom language that you can specify to get translated data for the fields of an object that's enabled for translation. See Translate Product and Product Category Data .	Optional	64.0
<code>offset</code>	Integer	Number of records to skip. The default value is 0.	Optional	60.0
<code>pageSize</code>	Integer	Specifies the number of records per page. Valid values are from 1 through 200. If the value is unspecified, it defaults to 100.	Optional	60.0
<code>relatedObjectFilters</code>	Related Object Filter[]	Criteria for the related objects to filter the records. The supported operator is <code>eq</code> . The supported object is <code>ProductSpecificationRecType</code> . The supported values are <code>true</code> and <code>false</code> . The supported property is <code>IsCommercial</code> .	Optional	60.0
<code>searchTerm</code>	String	String used to get products with the product name containing the search term. See Search Considerations When Using Indexed Data .	Optional	62.0
<code>sort</code>	Sort	Sort order for the products. If the Use Indexed Data For Product Listing and Search toggle from the Product Discovery Settings page from Setup is enabled, then you can sort products by using <code>name</code> only.	Optional	60.0

Response body for POST[Products Output](#)**Snapshot Collection (GET)**

Retrieve the created snapshots and snapshot indexes.

Resource

```
/connect/pcm/index/snapshots
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/pcm/index/snapshots
```

Available version

62.0

HTTP methods

GET

Query Parameter for GET

Parameter Name	Type	Description	Required or Optional	Available Version
numberOfIndexLogs	Integer	Number of index logs to include in the response. Specify a number from 0 through 100. The default value is 25.	Optional	63.0

Response body for GET
[Snapshot Collection](#)
Snapshot Deployment (POST)

Create indexes for a snapshot. Indexes improve search results and make it easier to find products at run time through search terms.

Resource

```
/connect/pcm/index/deploy
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/pcm/index/deploy
```

Available version

62.0

HTTP methods

POST

Request body for POST**JSON example**

This example shows a sample request to build a new snapshot with immediate activation.

```
{
  "snapshot": {
    "activationType": "IMMEDIATE"
  },
  "buildType": "FULL"
}
```

This example shows a sample request to rebuild a snapshot in the `active` status.

```
{
  "snapshot": {
    "activationType": "IMMEDIATE",
    "id": "1Avxx0000005DFe1AM"
  },
  "buildType": "FULL"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
buildType	String	Build type of the snapshot index. Valid value is: <ul style="list-style-type: none"> FULL—Specifies a full index build. INCREMENTAL—Specifies an incremental index build. Available from API version 63.0 and later. 	Required	62.0
snapshot	Run-time Catalog Snapshot Input[]	Snapshot to deploy.	Required	62.0

Response body for POST

[Snapshot Deployment](#)

Snapshot Index Error (GET)

Get the count and details of the errors that occurred during the indexing process.

Resource

```
/connect/pcm/index/error
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/pcm/index/error
```

Available version

63.0

HTTP methods

GET

Request parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
indexId	String	ID of the index.	Required	63.0

Parameter Name	Type	Description	Required or Optional	Available Version
snapshot IndexId	String	ID of the snapshot index.	Required	63.0

Response body for GET[Snapshot Index Error](#)**Unit of Measure Info (GET)**

Get details about the unit of measure for a specific set of records.

Resource`/connect/pcm/unit-of-measure/info`**Resource example**`https://yourInstance.salesforce.com/services/data/v65.0/connect/pcm/unit-of-measure/info`**Available version**

63.0

HTTP methods

GET

Query parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
correlationId	String	Unique token to track and associate related events or transactions across different components of the application. If unspecified, a Universally Unique Identifier (UUID) is generated.	Optional	63.0
ids	String	IDs of the unit of measure records.	Optional	63.0

Response body for GET[Bulk Unit Of Measure Info](#)**Unit of Measure Rounded Data (POST)**

Round off and scale decimal data for a specific set of fields.

Resource`/connect/pcm/unit-of-measure/rounded-data`**Resource example**`https://yourInstance.salesforce.com/services/data/v65.0/connect/pcm/unit-of-measure/rounded-data`

Available version

63.0

HTTP methods

POST

Request body for POST**JSON example**

```
{
  "dataRowInputs": [
    {
      "key": "PRC1",
      "fieldDataInputs": [
        {
          "fieldApiName": "MaxQuantity",
          "originalValue": 1234.5678,
          "unitOfMeasureId": "0hExx0000000001EAA"
        },
        {
          "fieldApiName": "MinQuantity",
          "originalValue": "987462848934739347.32232590183756545",
          "unitOfMeasureId": "0hExx0000000001dEAA"
        }
      ]
    },
    {
      "key": "PRC2",
      "fieldDataInputs": [
        {
          "fieldApiName": "MaxQuantity",
          "originalValue": 1234.5678,
          "unitOfMeasureId": "uomId1"
        },
        {
          "fieldApiName": "MinQuantity",
          "originalValue": 987.4628,
          "unitOfMeasureId": "Kgs Id"
        }
      ]
    },
    {
      "key": "PRC3",
      "fieldDataInputs": [
        {
          "fieldApiName": "MaxQuantity",
          "originalValue": 0.437584,
          "unitOfMeasureId": "uomId2"
        },
        {
          "fieldApiName": "MinQuantity",
          "originalValue": 7364.58923,
          "unitOfMeasureId": "uomId2"
        }
      ]
    }
  ]
}
```

```

    }
  ]
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
correlationId	String	Unique token to track and associate related events or transactions across different components of the application. If unspecified, a Universally Unique Identifier (UUID) is generated.	Optional	63.0
dataRowInputs	Data Row Input[]	List of row inputs for rounding the data.	Required	63.0

Response body for POST

[Data Rounding](#)

Request Bodies

Learn more about the available Product Catalog Management API request bodies.

[Additional Fields Input](#)

Input representation of the additional standard or custom fields to be included in the response.

[Bulk Product Details Input](#)

Input representation of the request to retrieve the details of multiple products.

[Catalog Input](#)

Input representation of the request to retrieve catalog records.

[Criteria Input](#)

Input representation of the filter criteria item request.

[Data Rounding Input](#)

Input representation of the details of the data rounding input.

[Data Row Input](#)

Input representation of the details of the input for a data rounding request.

[Deep Clone Input](#)

Input representation of the details of the object and associated record to be cloned.

[Field Data Input](#)

Input representation of the details of the field data input.

[Filter Input](#)

Input representation of the filter request.

[Include Object Input](#)

Input representation of the object to include in the response.

[Index Configuration Collection Input](#)

Input representation of the collection of index configurations.

[Index Configuration Input](#)

Input representation of the request to persist the index configuration.

[Index Setting Input](#)

Input representation of the index setting.

[Options Input](#)

Reserved for internal use.

[Order Input](#)

Input representation of the sort order item request.

[Product Input](#)

Input representation of a product in the catalog.

[Related Object Filters Input](#)

Input representation of the request to filter related objects.

[Related Object Node Input](#)

Input representation of the details of a related object node.

[Related Records Input](#)

Input representation of the request to retrieve related ProductRampSegment or ProductUsageGrant records for Product2 object.

[Run-time Catalog Snapshot Input](#)

Input representation of the details of a run-time catalog snapshot for deployment.

[Setting Input](#)

Input representation of the details of the index setting.

[Snapshot Deployment Input](#)

Input representation of the request to deploy a run-time catalog snapshot.

[Sort Input](#)

Input representation of the sort request.

Additional Fields Input

Input representation of the additional standard or custom fields to be included in the response.

JSON example

```
"additionalFields": {  
  "Product2": {  
    "fields": [  
      "code__c"  
    ]  
  }  
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
fields	String[]	List of additional standard or custom fields to be included in the response.	Required	61.0

Bulk Product Details Input

Input representation of the request to retrieve the details of multiple products.

JSON example

```
{
  "correlationId": "cbfabffb-093f-45b3-8c2d-88b4acbd4867",
  "productIds": [
    "01tT1000000F0afIAC",
    "01tT1000000F0afIAC"
  ],
  "uptoLevel": 1,
  "language": "french",
  "additionalFields": {
    "Product2": {
      "fields": [
        "code__c"
      ]
    },
    "ProductAttributeDefinition": {
      "fields": [
        "scope"
      ]
    }
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
additional Fields	Map<String, Additional Fields Input >	Map of object and list of additional standard or custom fields to be included in the response. The supported objects are: <ul style="list-style-type: none"> Product2 ProductAttributeDefinition—If the fields defined for the ProductAttributeDefinition object aren't available for the 	Optional	61.0

Name	Type	Description	Required or Optional	Available Version
		ProductClassificationAttr object, then the API request fails.		
correlationId	String	Unique token to track and associate related events or transactions across different components of the application. If unspecified, a Universally Unique Identifier (UUID) is generated.	Optional	61.0
language	String	Custom language that you can specify to get translated data for the fields of an object that's enabled for translation. See Translate Product and Product Category Data .	Optional	64.0
productIds	String[]	List of product IDs that details must be returned for. If any product ID is blank, invalid, or not found, then the request is processed with valid and available product IDs.	Required	61.0
uptoLevel	Integer	Hierarchy level to follow to return the product details. For a bundle, this property determines the number of levels of child components to be returned. You can specify up to a hierarchy level of 1. If unspecified, the default level is the full bundle hierarchy.	Optional	61.0

Catalog Input

Input representation of the request to retrieve catalog records.

JSON example

This example shows how to retrieve catalogs that contain `apple` in the catalog name.

```
{
  "pageSize": 100,
  "offset": 0,
  "language": "french",
  "filter": {
    "criteria": [
      {
        "property": "name",
        "operator": "contains",
        "value": "apple"
      }
    ]
  }
}
```

```

]
}
}

```

This example shows how to retrieve catalogs with `ServiceProcess` as the catalog type.

```

{
  "pageSize": 100,
  "offset": 0,
  "sort": {
    "orders": [
      {
        "property": "name",
        "direction": "desc"
      }
    ]
  },
  "filter": {
    "criteria": [
      {
        "property": "catalogType",
        "operator": "eq",
        "value": "ServiceProcess"
      }
    ]
  }
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
<code>correlationId</code>	String	Unique token to track and associate related events or transactions across different components of the application. If unspecified, a Universally Unique Identifier (UUID) is generated.	Optional	60.0
<code>filter</code>	Filter	Criteria to filter the records. Filters are applicable to the fields of the <code>ProductCatalog</code> object. The supported operators are: <ul style="list-style-type: none"> <code>eq</code> <code>in</code> <code>contains</code> The supported properties are <code>name</code> and <code>catalogType</code> .	Optional	60.0
<code>language</code>	String	Custom language that you can specify to get translated data for the fields of an object that's enabled for translation. See	Optional	64.0

Name	Type	Description	Required or Optional	Available Version
		Translate Product and Product Category Data.		
offset	Integer	Number of records to skip. The default value is 0.	Optional	60.0
pageSize	Integer	Number of records per page. Valid values are from 1 through 100. If unspecified, defaults to 100.	Optional	60.0
sort	Sort	Sort order of the catalog records. The supported operators are: <ul style="list-style-type: none"> • asc • desc 	Optional	60.0

Criteria Input

Input representation of the filter criteria item request.

JSON example

```
"criteria":
[
  {
    "attributeType": "ProductStandard",
    "property": "name",
    "operator": "eq",
    "value": "iPhone"
  },
  {
    "criteriaType": "CustomWhereCondition",
    "value": "(effectiveenddate = null OR effectiveenddate >= 2024-06-25)"
  }
]
```

Properties

Name	Type	Description	Required or Optional	Available Version
attributeType	String	Search attribute type of the facet for a faceted search. Valid values are: <ul style="list-style-type: none"> • ProductStandard • ProductCustom • ProductDynamicAttribute • ProductAttributeStandard • ProductAttributeCustom 	Optional	63.0

Name	Type	Description	Required or Optional	Available Version
		This property is applicable if the Use Indexed Data For Product Listing and Search toggle from the Product Discovery Settings page from Setup is enabled.		
<code>criteriaType</code>	String	Type of criteria for the filter. Valid value is: <ul style="list-style-type: none"> <code>CustomWhereCondition</code> 	Required	60.0
<code>operator</code>	String	Operator used for the filter criteria. The supported operators are: <ul style="list-style-type: none"> <code>eq</code> <code>in</code> <code>contains</code>—This value isn't applicable if the Use Indexed Data For Product Listing and Search toggle from the Product Discovery Settings page from Setup is enabled. <code>gt</code>—Specifies a greater than criteria. Available from API version 63.0 and later for Number, Date, and Datetime data types only. <code>lt</code>—Specifies a less than criteria. Available from API version 63.0 and later for Number, Date, and Datetime data types only. <code>gte</code>—Specifies a greater than or equal to criteria. Available from API version 63.0 and later for Number, Date, and Datetime data types only. <code>lte</code>—Specifies a less than or equal to criteria. Available from API version 63.0 and later for Number, Date, and Datetime data types only. 	Required	60.0
<code>property</code>	String	Property name to use in the filter, which must be the same as the object field.	Required	60.0
<code>value</code>	Object	Value for the filter criteria.	Required	60.0

Data Rounding Input

Input representation of the details of the data rounding input.

JSON example

```
{
  "dataRowInputs": [
    {
      "key": "PRC1",
      "fieldDataInputs": [
        {
          "fieldApiName": "MaxQuantity",
          "originalValue": 1234.5678,
          "unitOfMeasureId": "0hExx0000000001EAA"
        },
        {
          "fieldApiName": "MinQuantity",
          "originalValue": "987462848934739347.32232590183756545",
          "unitOfMeasureId": "0hExx000000001dEAA"
        }
      ]
    },
    {
      "key": "PRC2",
      "fieldDataInputs": [
        {
          "fieldApiName": "MaxQuantity",
          "originalValue": 1234.5678,
          "unitOfMeasureId": "uomId1"
        },
        {
          "fieldApiName": "MinQuantity",
          "originalValue": 987.4628,
          "unitOfMeasureId": "Kgs Id"
        }
      ]
    },
    {
      "key": "PRC3",
      "fieldDataInputs": [
        {
          "fieldApiName": "MaxQuantity",
          "originalValue": 0.437584,
          "unitOfMeasureId": "uomId2"
        },
        {
          "fieldApiName": "MinQuantity",
          "originalValue": 7364.58923,
          "unitOfMeasureId": "uomId2"
        }
      ]
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
correlationId	String	Unique token to track and associate related events or transactions across different components of the application. If unspecified, a Universally Unique Identifier (UUID) is generated.	Optional	63.0
dataRowInputs	Data Row Input[]	List of row inputs for rounding the data.	Required	63.0

Data Row Input

Input representation of the details of the input for a data rounding request.

JSON example

```

JSON example
{
  "dataRowInputs": [
    {
      "key": "PRC1",
      "fieldDataInputs": [
        {
          "fieldApiName": "MaxQuantity",
          "originalValue": 1234.5678,
          "unitOfMeasureId": "0hExx0000000001EAA"
        },
        {
          "fieldApiName": "MinQuantity",
          "originalValue": "987462848934739347.32232590183756545",
          "unitOfMeasureId": "0hExx000000001dEAA"
        }
      ]
    },
    {
      "key": "PRC2",
      "fieldDataInputs": [
        {
          "fieldApiName": "MaxQuantity",
          "originalValue": 1234.5678,
          "unitOfMeasureId": "uomId1"
        },
        {
          "fieldApiName": "MinQuantity",
          "originalValue": 987.4628,
          "unitOfMeasureId": "Kgs Id"
        }
      ]
    },
    {
      "key": "PRC3",

```



```

    "fieldDataInputs": [
      {
        "fieldApiName": "MaxQuantity",
        "originalValue": 0.437584,
        "unitOfMeasureId": "uomId2"
      },
      {
        "fieldApiName": "MinQuantity",
        "originalValue": 7364.58923,
        "unitOfMeasureId": "uomId2"
      }
    ]
  }
]
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
fieldData Inputs	Field Data Input[]	List of field-level data inputs.	Required	63.0
key	String	Key that identifies a unique data row.	Required	63.0

Deep Clone Input

Input representation of the details of the object and associated record to be cloned.

JSON example

```

{
  "mainRecordId": "01tSG0000028kcSYAQ",
  "mainObjectApiName": "Product2",
  "mainRecordFieldValues": {
    "Name": "New Cloud Storage"
  }
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
mainObject ApiName	String	API name of the object. The supported object is Product2.	Required	63.0
mainRecord FieldValues	Map<String, String>	Mapping of the API name of the field to its value. The values passed through this map are set for the created record. You can pass the Name field only through this map.	Optional	63.0
mainRecordId	String	ID of the record.	Required	63.0

Field Data Input

Input representation of the details of the field data input.

JSON example

```
"fieldDataInputs": [
  {
    "fieldApiName": "MaxQuantity",
    "originalValue": 0.437584,
    "unitOfMeasureId": "uomId2"
  },
  {
    "fieldApiName": "MinQuantity",
    "originalValue": 7364.58923,
    "unitOfMeasureId": "uomId2"
  }
]
```

Properties

Name	Type	Description	Required or Optional	Available Version
fieldApiName	String	Unique API name of the field.	Required	63.0
originalValue	String	Original value of the fields.	Required	63.0
unitOfMeasureId	String	ID of the unit of measure record that's associated to the field.	Required	63.0

Filter Input

Input representation of the filter request.

JSON example

```
"filter":
{
  "criteria": [ {
    "property": "name",
    "operator": "eq",
    "value": "iPhone"
  },
  {
    "criteriaType": "CustomWhereCondition",
    "value": "(effectiveenddate = null OR effectiveenddate >= 2024-06-25)"
  }
]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
criteria	Criteria[]	Details of the filter criteria.	Required if the filter property is specified.	60.0

Include Object Input

Input representation of the object to include in the response.

JSON example

```
"includeObjects":
[
  {
    "objectName": "ProductCategory"
  }
]
```

Properties

Name	Type	Description	Required or Optional	Available Version
objectName	String	Name of the object to include in the response. The supported object is ProductCategory.	Required if the options property is specified.	60.0

Index Configuration Collection Input

Input representation of the collection of index configurations.

JSON example

```
{
  "correlationId": "8545b5aa-f3e6-429a-8f21-9cc4ce50b1d7",
  "indexConfigurations": [
    {
      "attributeDefinitionId": "0tjT100000002bIAA",
      "name": "Color",
      "type": "ProductDynamicAttribute",
      "isSearchable": true
    },
    {
      "attributeFieldId": "00Nxx000001FwnABII",
      "name": "Message__c",
      "type": "Custom",
      "isSearchable": true
    },
    {
      "name": "Code",
      "type": "Standard",

```

```

    "isSearchable": true
  },
  {
    "facetDisplayRank": 1,
    "isFacetable": false,
    "isSearchable": true,
    "name": "Family",
    "type": "Standard"
  }
]
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
correlationId	String	Unique token to track and associate related events or transactions across different components of the application. If unspecified, a Universally Unique Identifier (UUID) is generated.	Optional	62.0
index Configurations	Index Configuration Input[]	List of index configurations.	Required	62.0

Index Configuration Input

Input representation of the request to persist the index configuration.

JSON example

```

"indexConfigurations": [
  {
    "attributeDefinitionId": "0tjT1000000002bIAA",
    "name": "Color",
    "type": "ProductDynamicAttribute",
    "isSearchable": true
  },
  {
    "attributeFieldId": "00Nxx000001FwnABII",
    "name": "Message__c",
    "type": "Custom",
    "isSearchable": true
  },
  {
    "name": "Code",
    "type": "Standard",
    "isSearchable": true
  },
  {
    "facetDisplayRank": 1,
    "isFacetable": false,
    "isSearchable": true,

```

```

    "name": "Family",
    "type": "Standard"
  }
]

```

Properties

Name	Type	Description	Required or Optional	Available Version
attribute DefinitionId	String	ID of the attribute definition.	Required if the attribute FieldId property isn't specified.	62.0
attribute FieldId	String	ID of the attribute field.	Required if the attribute DefinitionId property isn't specified.	62.0
facet DisplayRank	Integer	Sort order for displaying the facets at run time.	Optional	63.0
isFacetable	Boolean	Indicates whether the field is facetable (<code>true</code>) or not (<code>false</code>).	Optional	63.0
isSearchable	Boolean	Indicates whether the index-configured field is searchable (<code>true</code>) or not (<code>false</code>).	Optional	62.0
name	String	Name of the index-configured field.	Required	62.0
type	String	Type of the index-configured field.	Required	62.0

Index Setting Input

Input representation of the index setting.

JSON example

```

{
  "setting" : {
    "supportedLanguages" : ["en_US", "ja", "es", "nl_NL"],
    "defaultLanguage" : "en_US",
    "productsGrouping": "GROUPING_VARIATION"
  }
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
setting	Setting Input []	Object containing the setting-related details.	Required	63.0

Options Input

Reserved for internal use.

Order Input

Input representation of the sort order item request.

JSON example

```
"sort":{
  "orders":
  [[
    {"property": "name",
     "direction": "asc"}
  ]]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
direction	String	Direction to sort the list items, such as in ascending order or descending order.	Required	60.0
property	String	Property to use for the sorting of the list items.	Required	60.0

Product Input

Input representation of a product in the catalog.

JSON example

This example is a search request for products that contain `Bundle Product` in the product name.

```
{
  "catalogIds": [
    "0ZST10000004D030AE"
  ],
  "language": "spanish",
  "filter": {
    "criteria": [
      {
        "property": "name",
        "operator": "contains",
        "value": "Bundle Product"
      }
    ]
  },
  "relatedObjectFilters": [
    {
      "objectName": "ProductSpecificationRecType",
      "criteria": [
        {
```

```

        "property": "IsCommercial",
        "operator": "eq",
        "value": false
      }
    ],
    "additionalFields": {
      "Product2": {
        "fields": [
          "code__c"
        ]
      }
    }
  }
]
}

```

This example is a search request for products that contain the specified search term in the product name and are part of a catalog.

```

{
  "catalogIds": [
    "0ZSDU0000002Og54AE"
  ],
  "searchTerm": "Slack"
}

```

Query parameters

Name	Type	Description	Required or Optional	Available Version
product Classification Id	String	ID of the product classification template that contains a collection of dynamic attributes and can be reused to create multiple products. Products that are based on a product classification inherit all the attributes of the product classification. Specify either the product classification ID, list of category IDs, or list of catalog IDs to retrieve products.	Optional	60.0

Properties

Name	Type	Description	Required or Optional	Available Version
additional Fields	Map<String, Additional Fields Input >	Map of the object and the list of standard and custom fields to be queried along with the standard response. The supported object is Product2.	Optional	61.0

Name	Type	Description	Required or Optional	Available Version
catalogIds	List<String>	<p>List of comma-separated catalog IDs. The API returns the list of product records that are associated with the specified catalog IDs.</p> <p>Specify either the product classification ID, list of category IDs, or list of catalog IDs to retrieve products.</p>	Optional	60.0
categoryIds	List<String>	<p>List of comma-separated category IDs. The API returns the list of product records that are associated with the specified category IDs. If unspecified, then returns all products that are added to at least one category.</p> <p>Specify either the product classification ID, list of category IDs, or list of catalog IDs to retrieve products.</p>	Optional	60.0
correlationId	String	<p>Unique token to track and associate related events or transactions across different components of the application. If unspecified, a Universally Unique Identifier (UUID) is generated.</p>	Optional	60.0
filter	Criteria Input	<p>Criteria to filter the records. Filters are applicable to the fields of Product2 object. The supported operators are:</p> <ul style="list-style-type: none"> • <code>eq</code> • <code>in</code> • <code>contains</code>—This value isn't applicable if the Use Indexed Data For Product Listing and Search toggle from the Product Discovery Settings page from Setup is enabled. • <code>gt</code>—Specifies a greater than criteria. Available from API version 63.0 and later for Number, Date, and Datetime data types only. • <code>lt</code>—Specifies a less than criteria. Available from API version 63.0 and later for Number, Date, and Datetime data types only. • <code>gte</code>—Specifies a greater than or equal to criteria. Available from API 	Optional	60.0

Name	Type	Description	Required or Optional	Available Version
		<p>version 63.0 and later for Number, Date, and Datetime data types only.</p> <ul style="list-style-type: none"> <code>lte</code>—Specifies a less than or equal to criteria. Available from API version 63.0 and later for Number, Date, and Datetime data types only. <p>If multiple criteria are specified, then the criteria are combined by using the <code>and</code> operator.</p> <p>The supported properties are <code>name</code>, <code>description</code>, and <code>isActive</code>. If the Use Indexed Data For Product Listing and Search toggle from the Product Discovery Settings page from Setup is enabled, then the supported property is <code>name</code> only.</p>		
<code>language</code>	String	Custom language that you can specify to get translated data for the fields of an object that's enabled for translation. See Translate Product and Product Category Data .	Optional	64.0
<code>offset</code>	Integer	Number of records to skip. The default value is 0.	Optional	60.0
<code>pageSize</code>	Integer	Specifies the number of records per page. Valid values are from 1 through 200. If the value is unspecified, it defaults to 100.	Optional	60.0
<code>relatedObjectFilters</code>	Related Object Filter[]	Criteria for the related objects to filter the records. The supported operator is <code>eq</code> . The supported object is <code>ProductSpecificationRecType</code> . The supported values are <code>true</code> and <code>false</code> . The supported property is <code>IsCommercial</code> .	Optional	60.0
<code>searchTerm</code>	String	String used to get products with the product name containing the search term. See Search Considerations When Using Indexed Data .	Optional	62.0
<code>sort</code>	Sort	Sort order for the products.	Optional	60.0
		If the Use Indexed Data For Product Listing and Search toggle from the		

Name	Type	Description	Required or Optional	Available Version
		Product Discovery Settings page from Setup is enabled, then you can sort products by using name only.		

Related Object Filters Input

Input representation of the request to filter related objects.

JSON example

```
"relatedObjectFilters":
[
  {
    "criteria": [
      {
        "property": "IsCommercial",
        "operator": "eq",
        "value": true
      }
    ],
    "objectName": "ProductSpecificationRecType"
  }
]
```

Properties

Name	Type	Description	Required or Optional	Available Version
criteria	Criteria[]	Criteria to filter the related objects.	Required if the <code>relatedObjectFilters</code> property is specified.	60.0
objectName	String	API name of the object that's related to the main object.	Required if the <code>relatedObjectFilters</code> property is specified.	60.0

Related Object Node Input

Input representation of the details of a related object node.

JSON example

```
"relatedObjectNodes": [
  {
    "relatedObjectAPIName": "ProductRampSegment",
    "pageSize": 20,
    "offset": 0
  },
  {
    "relatedObjectAPIName": "ProductUsageGrant",
    "pageSize": 10,
  }
]
```

```

    "offset": 0,
    "filter": {
      "criteria": [
        {
          "property": "status",
          "operator": "eq",
          "value": "active"
        },
        {
          "property": "effectivestartdate",
          "operator": "lte",
          "value": "2024-06-25"
        },
        {
          "criteriaType": "CustomWhereCondition",
          "value": "(effectiveenddate = null OR effectiveenddate >= 2024-06-25)"
        }
      ]
    }
  ]
}
]

```

Properties

Name	Type	Description	Required or Optional	Available Version
filter	Criteria[]	<p>Criteria to filter records. The supported properties are:</p> <ul style="list-style-type: none"> • StartDate • EndDate • Status <p>The supported operators are:</p> <ul style="list-style-type: none"> • eq • gte • lte <p>The supported related object is ProductUsageGrant.</p> <p>If multiple criteria are specified, then the resultant criteria are combined by using the and operator.</p>	Optional	62.0
offset	Integer	Number of records to skip. The default value is 0.	Optional	62.0
pageSize	Integer	Number of records per page. Valid values are from 1 through 100. If unspecified, the default value is 100.	Optional	62.0

Name	Type	Description	Required or Optional	Available Version
relatedObjectAPIName	String	API name of the related object to return the records for. The supported related objects are ProductRampSegment and ProductUsageGrant.	Required	62.0

Related Records Input

Input representation of the request to retrieve related ProductRampSegment or ProductUsageGrant records for Product2 object.

JSON example

```
{
  "recordIds": [
    "01txx0000006i44AAA",
    "01txx0000006i5gAAA"
  ],
  "relatedObjectNodes": [
    {
      "relatedObjectAPIName": "ProductRampSegment",
      "pageSize": 20,
      "offset": 0
    },
    {
      "relatedObjectAPIName": "ProductUsageGrant",
      "pageSize": 10,
      "offset": 0,
      "filter": {
        "criteria": [
          {
            "property": "status",
            "operator": "eq",
            "value": "active"
          },
          {
            "property": "effectivestartdate",
            "operator": "lte",
            "value": "2024-06-25"
          },
          {
            "criteriaType": "CustomWhereCondition",
            "value": "(effectiveenddate = null OR effectiveenddate >= 2024-06-25)"
          }
        ]
      }
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
correlationId	String	Unique token to track and associate related events or transactions across different components of the application. If unspecified, a Universally Unique Identifier (UUID) is generated.	Optional	62.0
recordIds	String[]	List of record IDs to return the relatedObjects records for. The maximum number of record IDs supported is 20.	Required	62.0
relatedObjectNodes	Related Object Node Input[]	List of nodes for the related objects. The maximum number of related object nodes supported is two.	Required	62.0

Run-time Catalog Snapshot Input

Input representation of the details of a run-time catalog snapshot for deployment.

JSON example

```
"snapshot": {
  "activationType": "IMMEDIATE",
  "activationDate": "2024-05-06T05:12:59.000Z",
  "id": "1Avxx0000005DFe1AM"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
activationDate	String	Activation date of the snapshot.	Optional	62.0
activationType	String	Activation type of the snapshot. Valid value is: <ul style="list-style-type: none"> IMMEDIATE—Snapshot is activated immediately after a successful build. 	Required	62.0
id	String	ID of the snapshot.	Required	62.0

Setting Input

Input representation of the details of the index setting.

JSON example

```
"setting" : {
  "supportedLanguages" : ["en_US", "ja", "es", "nl_NL"],
```

```

    "defaultLanguage" : "en_US"
  }

```

Properties

Name	Type	Description	Required or Optional	Available Version
defaultLanguage	String	Default language for the API.	Required	63.0
supportedLanguages	String[]	List of supported language locales for indexing.	Required	63.0

Snapshot Deployment Input

Input representation of the request to deploy a run-time catalog snapshot.

JSON example

This example shows a sample request to build a new snapshot with immediate activation.

```

{
  "snapshot": {
    "activationType": "IMMEDIATE"
  },
  "buildType": "FULL"
}

```

This example shows a sample request to rebuild a snapshot in the `active` status.

```

{
  "snapshot": {
    "activationType": "IMMEDIATE",
    "id": "1Avxx0000005DFe1AM"
  },
  "buildType": "FULL"
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
buildType	String	Build type of the snapshot index. Valid value is: <ul style="list-style-type: none"> FULL—Specifies a full index build. INCREMENTAL—Specifies an incremental index build. Available from API version 63.0 and later. 	Required	62.0
snapshot	Run-time Catalog Snapshot Input[]	Snapshot to deploy.	Required	62.0

Sort Input

Input representation of the sort request.

JSON example

```
"sort":
{
  "orders":
  [{
    "property": "name",
    "direction": "asc"
  }]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
orders	Order[]	Details of the sort order.	Required if the sort property is specified.	60.0

Response Bodies

Learn more about the available Product Catalog Management API response bodies.

[Attribute Category](#)

Output representation of the attribute category.

[Attribute Definition](#)

Output representation of the attribute definition.

[Attribute Picklist](#)

Output representation of the attribute picklist.

[Attribute Picklist Value](#)

Output representation of the attribute picklist value.

[Bulk Unit Of Measure Info](#)

Output representation of the details of the unit of measure records along with error details.

[Data Rounding](#)

Output representation of the data rounding response.

[Data Row](#)

Output representation of the details of a data row.

[Catalog Output](#)

Output representation of the catalog definition.

[Catalogs Output](#)

Output representation of the retrieved catalog result.

[Categories Output](#)

Output representation of the retrieved categories result.

[Category Output](#)

Output representation of the category definition.

[Deep Clone Error](#)

Output representation of the error details related to the deep clone request.

[Deep Clone Record Response](#)

Output representation of the details of the cloned related records.

[Deep Clone Response](#)

Output representation of the details of the cloned record.

[Error Output](#)

Output representation of the error details.

[Facet Value](#)

Output representation of the facet values found in the search result.

[Field Data](#)

Output representation of the field data.

[Fields Info](#)

Output representation of the metadata fields in an object.

[Index Configuration Collection](#)

Output representation of the collection of index configuration details.

[Index Configuration Field](#)

Output representation of the details of the index-configured field.

[Index Configurations Update](#)

Output representation of the updated index configuration.

[Index Error](#)

Output representation of the error details related to an index.

[Index Setting](#)

Output representation of the retrieved index settings.

[Index Setting Update](#)

Output representation of the details of the updated index setting.

[Invalid Related Object Node](#)

Output representation of the invalid related object node with details of errors.

[Metadata](#)

Output representation of the metadata details for objects.

[Object Info](#)

Output representation of the object details along with its fields.

[Product Classification](#)

Output representation of the product classification details.

[Product Component Group](#)

Output representation of the product component group.

[Product](#)

Output representation of the product definition.

[Product Related Component](#)

Output representation of the product-related component.

[Product Selling Model](#)

Output representation of the definition of the product selling model.

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Output representation of the definition of the product selling model option.

[Product Specification Type](#)

Output representation of the product specification type.

[Products](#)

Output representation of the list of retrieved products.

[Related Object Records](#)

Output representation of the related records for a specified record ID and related object API name.

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[Related Records List](#)

Output representation of the list of related records.

[Search Facet](#)

Output representation of the details of the faceted search.

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[Setting Metadata](#)

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[Snapshot](#)

Output representation of the list of active snapshots.

[Snapshot Collection](#)

Output representation of the retrieved snapshot collection.

[Snapshot Deployment](#)

Output representation of the snapshot deployment.

[Snapshot Index](#)

Output representation of the snapshot index of a run-time catalog.

[Snapshot Index Error](#)

Output representation of the error details related to a snapshot index.

[Snapshot Index Info](#)

Output representation of the details of a snapshot index.

[Snapshot Index Log](#)

Output representation of a snapshot index log.

[Status](#)

Output representation of the status of the request.

[Unit of Measure Error](#)

Output representation of the details of errors encountered during the processing of the Unit of Measure API request.

[Unit of Measure Info](#)

Output representation of the details of a unit of measure record.

[Unit of Measure Status](#)

Output representation of the status of the Unit of Measure API request.

Attribute Category

Output representation of the attribute category.

JSON example

```
"attributeCategory": [
  {
    "attributes": [
      {
        "additionalFields": {
          "scope": "Order"
        },
        "attributeNameOverride": "AD Text",
        "code": "AD02",
        "dataType": "Text",
        "defaultValue": "AD Text DV",
        "description": "AD Text Desc",
        "displayType": "Text",
        "helpText": "AD Text DHT",
        "id": "0tjT1000000002bIAA",
        "isHidden": false,
        "isPriceImpacting": true,
        "isReadOnly": true,
        "isRequired": true,
        "label": "AD Text Label",
        "maximumCharacterCount": "20",
        "maximumValue": "100",
        "minimumCharacterCount": "1",
        "minimumValue": "50",
        "name": "AD Text",
        "sequence": 1,
        "status": "Active",
        "valueDescription": "AD Text VD"
      }
    ],
    "code": "AC001",
    "id": "0v3T1000000000BIAQ",
    "name": "build and make"
  }
]
```

Property Name	Type	Description	Filter Group and Version	Available Version
attributes	Attribute Definition []	List of categorized attributes associated with the product.	Small, 60.0	60.0
code	String	Code of the attribute category.	Small, 60.0	60.0
id	String	ID associated with the attribute category.	Small, 60.0	60.0
name	String	Name of the attribute category. If data translation is set up and specified in the org, the translated description is available.	Small, 60.0	60.0

Attribute Definition

Output representation of the attribute definition.

JSON example

```

"attributes": [
  {
    "additionalFields": {
      "scope": "Order"
    },
    "attributeNameOverride": "AD Text",
    "code": "AD02",
    "dataType": "Text",
    "defaultValue": "AD Text DV",
    "description": "AD Text Desc",
    "displayType": "Text",
    "helpText": "AD Text DHT",
    "id": "0tjT1000000002bIAA",
    "isHidden": false,
    "isPriceImpacting": true,
    "isReadOnly": true,
    "isRequired": true,
    "label": "AD Text Label",
    "maximumCharacterCount": 20,
    "maximumValue": "100",
    "minimumCharacterCount": 1,
    "minimumValue": "50",
    "name": "AD Text",
    "sequence": 1,
    "status": "Active",
    "valueDescription": "AD Text VD"
  },
  {
    "code": "AC001",
    "id": "0v3T1000000000BIAQ",
    "name": "build and make"
  }
]

```

Property Name	Type	Description	Filter Group and Version	Available Version
additional Fields	Map<String, Additional Fields Input >	Key-value pair of additional standard or custom fields to include in the response.	Small, 61.0	61.0
attributeName Override	String	Name to display for the attribute, which overrides the name on the attribute. For example, the Color attribute is overridden to display as Laptop Color.	Small, 60.0	60.0
code	String	Unique code of the attribute definition.	Small, 60.0	60.0
dataType	String	Data type of the attribute definition value.	Small, 60.0	60.0
defaultValue	String	Default value of the attribute.	Small, 60.0	60.0
description	String	Description of the attribute.	Small, 60.0	60.0
displayType	String	Display types of the attribute. Valid values are: <ul style="list-style-type: none"> • Radio Button • Checkbox • Toggle • Input Date • DateTime • Currency Symbol • Currency Code • Currency Name • Percentage • Text • Combobox • Radio Button • MultiSelect • MultiSelectCheckboxes 	Small, 60.0	60.0
helpText	String	Help text that appears at run time for the attribute. If data translation is set up and specified in the org, the translated description is available.	Small, 60.0	60.0
id	String	ID of the attribute definition.	Small, 60.0	60.0
is Configurable	Boolean	Reserved for future use.	Small, 60.0	60.0

Property Name	Type	Description	Filter Group and Version	Available Version
isHidden	Boolean	Indicates whether to hide the attribute from the users in the order capture interface (<code>true</code>) or not (<code>false</code>).	Small, 60.0	60.0
isPrice Impacting	Boolean	Indicates whether the attribute impacts the product price (<code>true</code>) or not (<code>false</code>).	Small, 60.0	60.0
isReadOnly	Boolean	Indicates whether the product attribute is read-only for the end users in the order capture page (<code>true</code>) or not (<code>false</code>).	Small, 60.0	60.0
isRequired	Boolean	Indicates whether a value for the attribute is required for the assigned parent object (<code>true</code>) or not (<code>false</code>).	Small, 60.0	60.0
isValue Cloneable	Boolean	Reserved for future use.	Small, 60.0	60.0
label	String	Label of the attribute. If data translation is set up and specified in the org, the translated description is available.	Small, 60.0	60.0
maximum Character Count	Integer	Maximum number of alphanumeric characters that can be entered for attributes of type number and text in run time.	Small, 60.0	60.0
maximumValue	String	Maximum value that can be entered for attributes of type number, currency, and percent in run time.	Small, 60.0	60.0
minimum Character Count	Integer	Minimum number of alphanumeric characters that can be entered for attributes of type number and text in run time. The minimum character count must be less than or equal to the maximum character count.	Small, 60.0	60.0
minimumValue	String	Minimum value that can be entered for attributes of type number, currency, and percent in run time. The minimum value must be less than or equal to the maximum value.	Small, 60.0	60.0
name	String	Name of the attribute.	Small, 60.0	60.0
picklist	Attribute Picklist	ID of the attribute picklist that provides the valid values for the attribute.	Small, 60.0	60.0
sequence	Integer	Order in which the attribute values appear in the attribute definition when the product is configured at run time.	Small, 60.0	60.0

Property Name	Type	Description	Filter Group and Version	Available Version
status	String	Lifecycle state of the attribute picklist. Valid values are: <ul style="list-style-type: none"> • Active • Draft • Inactive 	Small, 60.0	60.0
stepValue	String	Reserved for future use.	Small, 60.0	60.0
valueDecoder	String	Reserved for future use.	Small, 60.0	60.0
value Description	String	Description of the value assigned to the attribute.	Small, 60.0	60.0

Attribute Picklist

Output representation of the attribute picklist.

JSON example

```

"picklist": {
  "dataType": "Text",
  "description": "Fabric Module options",
  "id": "0v51Q000000TNDkQAO",
  "name": "Fabric Module options",
  "values": [
    {
      "abbreviation": "IFM1"
      "code": "PV0051",
      "displayValue": "25G Intelligent Fabric Module with 8x 25G SFP28 ports",
      "id": "0v61Q0000008OMYQA2",
      "name": "25G Intelligent Fabric Module with 8x 25G SFP28 ports",
      "sequence": "1",
      "value": "25G Intelligent Fabric Module with 8x 25G SFP28 ports",
      "status" : "Active"
    },
    {
      "abbreviation": "IFM2"
      "code": "PV0052",
      "displayValue": "100G Intelligent Fabric Module with 8x 100G QSFP28 ports",
      "id": "0v61Q0000008OMZQA2",
      "name": "100G Intelligent Fabric Module with 8x 100G QSFP28 ports",
      "sequence": "2",
      "value": "100G Intelligent Fabric Module with 8x 100G QSFP28 ports",
      "status" : "Active"
    }
  ]
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
dataType	String	Data type of the values in the picklist. Valid values are: <ul style="list-style-type: none"> • Boolean • Date • Datetime • Number • Text • Currency • Percent 	Small, 60.0	60.0
description	String	Description of the picklist, such as the picklist purpose or the associated product.	Small, 60.0	60.0
id	String	ID associated with the attribute picklist record.	Small, 60.0	60.0
name	String	Name of the picklist value.	Small, 60.0	60.0
values	Attribute Picklist Value[]	List of values associated with the picklist.	Small, 60.0	60.0

Attribute Picklist Value

Output representation of the attribute picklist value.

JSON example

```

"values": [
  {
    "abbreviation": "IFM1"
    "code": "PV0051",
    "displayValue": "25G Intelligent Fabric Module with 8x 25G SFP28 ports",
    "id": "0v61Q0000008OMYQA2",
    "name": "25G Intelligent Fabric Module with 8x 25G SFP28 ports",
    "sequence": "1",
    "value": "25G Intelligent Fabric Module with 8x 25G SFP28 ports",
    "status" : "Active"
  }
]

```

Property Name	Type	Description	Filter Group and Version	Available Version
abbreviation	String	Name of the picklist value that appears at run time.	Small, 60.0	60.0
code	String	Unique code of the picklist value within the picklist.	Small, 60.0	60.0

Property Name	Type	Description	Filter Group and Version	Available Version
displayValue	String	Picklist value that appears at run time in the order capture page. If data translation is set up and specified in the org, the translated description is available.	Small, 60.0	60.0
id	String	ID associated with the attribute picklist value.	Small, 60.0	60.0
name	String	Name of the picklist value.	Small, 60.0	60.0
sequence	String	Order in which the picklist value appears in the picklist.	Small, 60.0	60.0
status	String	Status of the attribute picklist value.	Small, 62.0	62.0
value	String	Value of the picklist item. Value must be unique within the picklist.	Small, 60.0	60.0

Bulk Unit Of Measure Info

Output representation of the details of the unit of measure records along with error details.

JSON example

```
{
  "correlationId": "928ea35f-8a2f-4932-9f7e-ec6cdbcabdbe",
  "errorCodeToErrorMap": {
    "UNIT_OF_MEASURE_INFO_INVALID_UOM_IDS": {
      "errorCode": "UOM_INFO_API_003",
      "messageDetail": "Invalid uomId is passed. Please specify a valid uomId.",
      "messageTitle": "Invalid uomId is passed.",
      "recordIds": [
        "sample"
      ],
      "source": "Unit_Of_Measure_Info_Api"
    }
  },
  "status": {
    "errors": [],
    "httpStatusCode": "200",
    "message": " Successfully fetched UnitOfMeasure Info. "
  },
  "uomIdToUnitOfMeasureInfo": {
    "0hEU200000003M5MAI": {
      "id": "0hEU200000003M5MAI",
      "name": "Pounds",
      "roundingMethod": "Nearest",
      "scale": 1,
      "unitCode": "Pounds"
    },
    "0hEU200000003KTMAI": {
      "id": "0hEU200000003KTMAI",

```



```

    "name": "Grams",
    "roundingMethod": "Down",
    "scale": 5,
    "unitCode": "Grams"
  }
}
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
correlationId	String	Unique token to track and associate related events or transactions across different components of the application. If unspecified, a Universally Unique Identifier (UUID) is generated.	Small, 63.0	63.0
errorCodeToErrorMap	Map<String, Unit Of Measure Error >	Error codes mapped to their details.	Small, 63.0	63.0
status	Unit Of Measure Status []	Status of the API request.	Small, 63.0	63.0
uomIdToUnitOfMeasureInfo	Map<String, Unit Of Measure Info >	Unit of measure record IDs mapped to their details.	Small, 63.0	63.0

Data Rounding

Output representation of the data rounding response.

JSON example

```

{
  "keyToUomDataRowOutput": {
    "PRC1": {
      "key": "PRC1",
      "fieldApiNameToFieldDataOutput": {
        "MaxQuantity": {
          "fieldApiName": "MaxQuantity",
          "originalValue": 1234.5678,
          "isRoundingApplicable": true,
          "roundedValue": 1234.56,
          "unitOfMeasureId": "uomId1",
          "errorCodeToErrorMap" : []
        },
        "MinQuantity": {
          "fieldApiName": "MinQuantity",
          "originalValue": 643.1,
          "isRoundingApplicable": true,
          "roundedValue": 643.1,
          "unitOfMeasureId": "uomId1"
        }
      }
    },
    "errorCodeToErrorMap" : []
  }
}

```

```

    },
    "PRC2": {
      "key": "PRC2",
      "fieldApiNameToFieldDataOutput": {
        "MaxQuantity": {
          "fieldApiName": "MaxQuantity",
          "originalValue": 1234.5678,
          "isRoundingApplicable": true,
          "roundedValue": 1234.56,
          "unitOfMeasureId": "uomId1"
        },
        "MinQuantity": {
          "fieldApiName": "MinQuantity",
          "originalValue": 987.4628,
          "isRoundingApplicable": true,
          "errorCodeToErrorMap": {
            "message": "arithrmetic operation"
          },
          "unitOfMeasureId": "uomId1"
        }
      },
      "errorCodeToErrorMap": []
    },
    "PRC3": {
      "key": "PRC3",
      "fieldApiNameToFieldDataOutput": {
        "MaxQuantity": {
          "fieldApiName": "MaxQuantity",
          "originalValue": 1234.5678,
          "isRoundingApplicable": false,
          "unitOfMeasureId": "uomId2"
        },
        "MinQuantity": {
          "fieldApiName": "MinQuantity",
          "originalValue": 987.4628,
          "isRoundingApplicable": false,
          "unitOfMeasureId": "uomId2"
        }
      },
      "errorCodeToErrorMap": []
    }
  }
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
correlationId	String	Unique token to track and associate related events or transactions across different components of the application. If unspecified, a Universally Unique Identifier (UUID) is generated.	Small, 63.0	63.0

Property Name	Type	Description	Filter Group and Version	Available Version
errorCodeToErrorMap	Map<String, Unit Of Measure Error >	Error codes mapped to their details.	Small, 63.0	63.0
keyToDataRowOutput	Map<String, Data Row >	Data row key mapped to the associated data row.	Small, 63.0	63.0
status	Unit Of Measure Status []	Status of the API request.	Small, 63.0	63.0

Data Row

Output representation of the details of a data row.

JSON example

```
{
  "keyToUomDataRowOutput": {
    "PRC1": {
      "key": "PRC1",
      "fieldApiNameToFieldDataOutput": {
        "MaxQuantity": {
          "fieldApiName": "MaxQuantity",
          "originalValue": 1234.5678,
          "isRoundingApplicable": true,
          "roundedValue": 1234.56,
          "unitOfMeasureId": "uomId1",
          "errorCodeToErrorMap" : []
        },
        "MinQuantity": {
          "fieldApiName": "MinQuantity",
          "originalValue": 643.1,
          "isRoundingApplicable": true,
          "roundedValue": 643.1,
          "unitOfMeasureId": "uomId1"
        }
      },
      "errorCodeToErrorMap" : []
    },
    "PRC2": {
      "key": "PRC2",
      "fieldApiNameToFieldDataOutput": {
        "MaxQuantity": {
          "fieldApiName": "MaxQuantity",
          "originalValue": 1234.5678,
          "isRoundingApplicable": true,
          "roundedValue": 1234.56,
          "unitOfMeasureId": "uomId1"
        },
        "MinQuantity": {
          "fieldApiName": "MinQuantity",
          "originalValue": 987.4628,

```

```

        "isRoundingApplicable": true,
        "errorCodeToErrorMap": {
            "message": "arithrmetic operation"
        },
        "unitOfMeasureId": "uomId1"
    }
},
"errorCodeToErrorMap": []
},
"PRC3": {
    "key": "PRC3",
    "fieldApiNameToFieldDataOutput": {
        "MaxQuantity": {
            "fieldApiName": "MaxQuantity",
            "originalValue": 1234.5678,
            "isRoundingApplicable": false,
            "unitOfMeasureId": "uomId2"
        },
        "MinQuantity": {
            "fieldApiName": "MinQuantity",
            "originalValue": 987.4628,
            "isRoundingApplicable": false,
            "unitOfMeasureId": "uomId2"
        }
    },
    "errorCodeToErrorMap": []
}
}
}
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
errorCodeToErrorMap	Map<String, Unit Of Measure Error >	Map of error codes to their details.	Small, 63.0	63.0
fieldApiNameToFieldDataOutput	Map<String, Field Data >	Map of field API name to associated field data.	Small, 63.0	63.0
key	String	Unique key of the data row.	Small, 63.0	63.0

Catalog Output

Output representation of the catalog definition.

JSON example

```

catalogs": [
  {
    "catalogType": "Sales",
    "code": "CAT009",
    "description": "SmartBytes B2B Catalog",
    "effectiveEndDate": "31-07-2023",

```

```

    "effectiveStartDate": "24-07-2023",
    "id": "0ZS1Q000000XbZAWA0",
    "name": "SmartBytes B2B Catalog",
    "numberOfCategories": 8
  }
]

```

Property Name	Type	Description	Filter Group and Version	Available Version
catalogType	String	The category of an entry in the catalog, which is customizable. For example, catalog types, such as sellable products, services, parts, technical services, or technical resources.	Small, 60.0	60.0
code	String	Unique ID associated with the catalog.	Small, 60.0	60.0
description	String	Description of the catalog. If data translation is set up and specified in the org, the translated description is available.	Small, 60.0	60.0
effective EndDate	String	Date and time from when the catalog isn't available to the end users.	Small, 60.0	60.0
effective StartDate	String	Date and time from when the catalog is available to the end users.	Small, 60.0	60.0
id	String	ID of the catalog.	Small, 60.0	60.0
name	String	Name of the catalog. If data translation is set up and specified in the org, the translated description is available.	Small, 60.0	60.0
numberOf Categories	Integer	Number of categories in the catalog.	Small, 60.0	60.0

Catalogs Output

Output representation of the retrieved catalog result.

JSON example

```

{
  "catalogs": [
    {
      "catalogType": "Sales",
      "code": "CAT009",
      "id": "0ZS1Q000000XbZAWA0",
      "name": "SmartBytes B2B Catalog",
      "numberOfCategories": 8
    }
  ],
  "correlationId": "0b7b6a30-895c-407a-91b3-e67482d339a3",

```

```

"count": 1,
"status": {
  "code": "200",
  "errors": [],
  "message": "Successfully fetched the catalog records."
}
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
catalogs	Catalog Output[]	List of the catalogs.	Small, 60.0	60.0
correlationId	String	Unique token to track and associate related events or transactions across different components of the application. If unspecified, a Universally Unique Identifier (UUID) is generated.	Small, 60.0	60.0
count	Integer	Total number of the catalog records retrieved after the query execution, wherein the <code>pageSize</code> property determines the number of records returned in every page.	Small, 60.0	60.0
status	Status	Status of the request.	Small, 60.0	60.0

Categories Output

Output representation of the retrieved categories result.

JSON example

```

{
  "categories": [
    {
      "catalogId": "0ZS1Q000000XbZAWA0",
      "code": "B2B Category",
      "description": "Products Category",
      "hasSubCategories": true,
      "id": "0ZG1Q000000XbVGWA0",
      "name": "Unified Computing",
      "numberOfProducts": 2,
      "parentCategoryId": "0ZGT100000000q1OAA",
      "sortOrder": 2,
      "subCategories": [],
      "isNavigational": false
    }
  ],
  "correlationId": "30230973-0a09-405e-b148-f085bb6dd66e",
  "status": {
    "code": "200",
    "errors": [],
    "message": "Successfully fetched the category records."
  }
}

```

```
}
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
categories	Category Output []	List of the retrieved categories.	Small, 60.0	60.0
correlationId	String	Unique token to track and associate related events or transactions across different components of the application. If unspecified, a Universally Unique Identifier (UUID) is generated.	Small, 60.0	60.0
status	Status	Status of the request.	Small, 60.0	60.0

Category Output

Output representation of the category definition.

JSON example

```
"categories": [
  {
    "catalogId": "0ZS1Q000000XbZAWA0",
    "code": "B2B Category",
    "description": "Products Category",
    "hasSubCategories": true,
    "id": "0ZG1Q000000XbVGWA0",
    "name": "Unified Computing",
    "numberOfProducts": 2,
    "parentCategoryId": "0ZGT100000000q1OAA",
    "sortOrder": 2,
    "subCategories": [],
    "isNavigational": false
  }
]
```

Property Name	Type	Description	Filter Group and Version	Available Version
catalogId	String	ID of the catalog that the category is associated with.	Small, 60.0	60.0
code	String	Unique code of the product category.	Small, 60.0	60.0
description	String	Description of the category. If data translation is set up and specified in the org, the translated description is available.	Small, 60.0	60.0
hasSub Categories	Boolean	Indicates whether the subcategories are available (true) or not (false).	Small, 60.0	60.0
id	String	ID of the category.	Small, 60.0	60.0

Property Name	Type	Description	Filter Group and Version	Available Version
isNavigational	Boolean	Indicates whether the category node is navigational (<code>true</code>) or not (<code>false</code>).	Small, 62.0	62.0
name	String	Name of the category. If data translation is set up and specified in the org, the translated name is available.	Small, 60.0	60.0
numberOfProducts	Integer	Number of products associated with the category.	Small, 60.0	60.0
parentCategoryId	String	ID of the parent category.	Small, 60.0	60.0
sortOrder	Integer	Display order of the product category relative to the siblings with the same parent category.	Small, 60.0	60.0
subCategories	Category Output []	List of subcategories, if available. This property is returned with the Categories List (GET) API response.	Small, 60.0	60.0

Deep Clone Error

Output representation of the error details related to the deep clone request.

Property Name	Type	Description	Filter Group and Version	Available Version
errorCode	String	Code of the error message related to the deep clone request.	Small, 63.0	63.0
errorMessage	String	Details of the error message related to the deep clone request.	Small, 63.0	63.0

Deep Clone Record Response

Output representation of the details of the cloned related records.

JSON example

```
"createdRecordList": [
  {
    "createdRecordId": "01tSG0000030Yb3YAE",
    "entityApiName": "Product2",
    "entityLabel": "Product"
  },
  {
    "createdRecordId": "0iOSG0000002rMn2AI",
    "entityApiName": "ProductSellingModelOption",
    "entityLabel": "Product Selling Model Option"
  }
]
```



```

    },
    {
      "createdRecordId": "0v7SG0000001ktdYAA",
      "entityApiName": "ProductAttributeDefinition",
      "entityLabel": "Product Attribute Definition"
    }
  ]

```

Property Name	Type	Description	Filter Group and Version	Available Version
created RecordId	String	ID of the created related record.	Small, 63.0	63.0
entityApiName	String	API name of the created object.	Small, 63.0	63.0
entityLabel	String	Label of the created object.	Small, 63.0	63.0

Deep Clone Response

Output representation of the details of the cloned record.

JSON example

```

{
  "createdRecordList": [
    {
      "createdRecordId": "01tSG00000030Yb3YAE",
      "entityApiName": "Product2",
      "entityLabel": "Product"
    },
    {
      "createdRecordId": "0iOSG0000002rMn2AI",
      "entityApiName": "ProductSellingModelOption",
      "entityLabel": "Product Selling Model Option"
    },
    {
      "createdRecordId": "0v7SG0000001ktdYAA",
      "entityApiName": "ProductAttributeDefinition",
      "entityLabel": "Product Attribute Definition"
    }
  ],
  "createdRootRecordId": "01tSG00000030Yb3YAE",
  "errorList": [],
  "isSuccessful": true
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
created RecordList	Deep Clone Record Response[]	List of cloned related records of the main record.	Small, 63.0	63.0

Property Name	Type	Description	Filter Group and Version	Available Version
createdRoot RecordId	String	ID of the created root record.	Small, 63.0	63.0
errorList	Deep Clone Error[]	Details of errors, if any.	Small, 63.0	63.0
errorMessage	String	Error message if the API request fails.	Small, 63.0	63.0
isSuccessful	Boolean	Indicates whether the API request is successful (<code>true</code>) or not (<code>false</code>).	Small, 63.0	63.0

Error Output

Output representation of the error details.

Property Name	Type	Description	Filter Group and Version	Available Version
errorCode	String	Code of the error message.	Small, 60.0	60.0
messageDetail	String	Details of the error message.	Small, 60.0	60.0
messageTitle	String	Title of the error message.	Small, 60.0	60.0
nodeProductId	String	ID of the product node.	Small, 61.0	61.0
recordId	String	ID of the record.	Small, 60.0	60.0
recordName	String	Name of the record.	Small, 60.0	60.0
related ObjectNodes	Invalid Related Object Node[]	List of related object nodes with errors.	Small, 62.0	62.0
source	String	Name of the API that's the source of the error.	Small, 60.0	60.0

Facet Value

Output representation of the facet values found in the search result.

JSON example

```

"values": [
  {
    "displayName": "Simple",
    "nameOrId": "Simple",
    "productCount": 9
  }
]

```

Property Name	Type	Description	Filter Group and Version	Available Version
displayName	String	Display name of the facet value.	Small, 63.0	63.0
nameOrId	String	Facet value name or ID. Reserved for internal use.	Small, 63.0	63.0
productCount		Number of products in the search result that match the facet value.	Small, 63.0	63.0

Field Data

Output representation of the field data.

Property Name	Type	Description	Filter Group and Version	Available Version
errorCodeToErrorMap	Map<String, Unit Of Measure Error >	Error codes mapped to their details.	Small, 63.0	63.0
fieldApiName	String	Unique API Name of the field.	Small, 63.0	63.0
isRoundingApplicable	Boolean	Indicates whether data rounding is applicable to the decimal (<code>true</code>) or not (<code>false</code>).	Small, 63.0	63.0
originalValue	String	Original value of the field.	Small, 63.0	63.0
roundedValue	String	Rounded field value that corresponds to the original value, if data rounding is applicable.	Small, 63.0	63.0
unitOfMeasureId	String	ID of the unit of measure record that's associated to the field.	Small, 63.0	63.0

Fields Info

Output representation of the metadata fields in an object.

JSON example

```

"fields": [
  {
    "dataType": "text",
    "isFacetableConfigurable": true,
    "isSearchableConfigurable": false,
    "label": "Product Name",
    "name": "Name",
    "type": "Standard"
  },
  {
    "dataType": "multilinetext",
    "isFacetableConfigurable": false,
    "isSearchableConfigurable": true,

```

```

        "label": "Product Description",
        "name": "Description",
        "type": "Standard"
    }
]

```

Property Name	Type	Description	Filter Group and Version	Available Version
customFieldId	String	ID of the custom field.	Small, 62.0	62.0
dataType	String	Type of data.	Small, 62.0	62.0
isConfigurable	Boolean	Reserved for internal use.	Small, 62.0	62.0
isFacetableConfigurable	Boolean	Indicates whether the field is facetable (true) or not (false).	Small, 63.0	Small, 63.0
isSearchableConfigurable	Boolean	Indicates whether the field is searchable (true) or not (false).	Small, 63.0	Small, 63.0
label	String	Label of the object field.	Small, 62.0	62.0
name	String	Name of the object field.	Small, 62.0	62.0
type	String	Type of the object field.	Small, 62.0	62.0

Index Configuration Collection

Output representation of the collection of index configuration details.

JSON example

```

{
  "correlationId": "ad960cb6-392d-4d11-bac3-3824baedf67e",
  "errors": [],
  "indexConfigurations": [
    {
      "isSearchable": true,
      "name": "Name",
      "type": "Standard"
    }
  ],
  "metadata": {
    "objectInfos": [
      {
        "fields": [
          {
            "dataType": "text",
            "isFacetableConfigurable": true,
            "isSearchableConfigurable": false,
            "label": "Product Name",
            "name": "Name",
            "type": "Standard"
          }
        ]
      }
    ]
  }
}

```

```

    },
    {
      "dataType": "multilinetext",
      "isFacetableConfigurable": false,
      "isSearchableConfigurable": true,
      "label": "Product Description",
      "name": "Description",
      "type": "Standard"
    }
  ],
  "name": "Product2"
},
{
  "fields": [
    {
      "dataType": "stringplusclob",
      "label": "Description",
      "name": "Description",
      "type": "ProductAttributeDefinitionStandard"
    },
    {
      "dataType": "text",
      "label": "Name",
      "name": "Name",
      "type": "ProductAttributeDefinitionStandard"
    }
  ],
  "name": "ProductAttributeDefinition"
}
]
},
"statusCode": "200"
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
correlationId	String	Unique token to track and associate related events or transactions across different components of the application. If unspecified, a Universally Unique Identifier (UUID) is generated.	Small, 62.0	62.0
errors	Error Output[]	List of errors, if any.	Small, 62.0	62.0
index Configurations	Index Configuration Field[]	Details of the index-configured fields.	Small, 62.0	62.0
metadata	Metadata[]	Details of the metadata for objects.	Small, 62.0	62.0
statusCode	String	Code that indicates the status of the request.	Small, 62.0	62.0

Index Configuration Field

Output representation of the details of the index-configured field.

JSON example

```
"indexConfigurations": [
  {
    "attributeDefinitionId": "0tjT1000000002bIAA",
    "name": "Color",
    "type": "ProductDynamicAttribute",
    "isSearchable": true
  },
  {
    "attributeFieldId": "00Nxx000001FwnABII",
    "name": "Message__c",
    "type": "Custom",
    "isSearchable": true
  },
  {
    "name": "Code",
    "type": "Standard",
    "isSearchable": true
  },
  {
    "facetDisplayRank": 1,
    "isFacetable": false,
    "isSearchable": true,
    "name": "Family",
    "type": "Standard"
  }
]
```

Property Name	Type	Description	Filter Group and Version	Available Version
attributeDefinitionId	String	ID of the attribute definition.	Small, 62.0	62.0
attributeFieldId	String	ID of the attribute field.	Small, 62.0	62.0
facetDisplayRank	Integer	Sort order for displaying the facets at run time.	Small, 63.0	63.0
isFacetable	Boolean	Indicates whether the field is facetable (<code>true</code>) or not (<code>false</code>).	Small, 63.0	63.0
isSearchable	Boolean	Indicates whether the index-configured field is searchable (<code>true</code>) or not (<code>false</code>).	Small, 62.0	62.0
name	String	Name of the index-configured field.	Small, 62.0	62.0
type	String	Type of the index-configured field.	Small, 62.0	62.0

Index Configurations Update

Output representation of the updated index configuration.

JSON example

```
{
  "correlationId": "8545b5aa-f3e6-429a-8f21-9cc4ce50b1d7",
  "errors": [],
  "indexConfigurations": [
    {
      "attributeDefinitionId": "0tjT1000000002bIAA",
      "name": "Color",
      "type": "ProductDynamicAttribute",
      "isSearchable": true
    },
    {
      "attributeFieldId": "00Nxx000001FwnABII",
      "name": "Message__c",
      "type": "Custom",
      "isSearchable": true
    },
    {
      "name": "Code",
      "type": "Standard",
      "isSearchable": true
    },
    {
      "facetDisplayRank": 1,
      "isFacetable": false,
      "isSearchable": true,
      "name": "Family",
      "type": "Standard"
    }
  ],
  "statusCode": "200"
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
correlationId	String	Unique token to track and associate related events or transactions across different components of the application. If unspecified, a Universally Unique Identifier (UUID) is generated.	Small, 62.0	62.0
errors	Error Output[]	List of errors, if any.	Small, 62.0	62.0
index Configurations	Index Configuration Field[]	Details of the index-configured fields.	Small, 62.0	62.0
statusCode	String	Code that indicates the status of the request.	Small, 62.0	62.0

Index Error

Output representation of the error details related to an index.

JSON example

```
"indexErrorDetails": {
  "errorFileId": "069xx0000004C92AAE",
  "indexCreatedDate": "2024-10-03T05:24:18.000Z",
  "indexErrorsCount": 1,
  "indexLastUpdatedDate": "2024-10-03T05:27:00.000Z",
  "itemLevelErrorsCount": 1
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
errorFileId	String	ID of the exported error file that contains the index errors.	Small, 63.0	63.0
indexCreatedDate	String	Date on which the index was created.	Small, 63.0	63.0
indexErrorsCount	Integer	Number of index-level errors.	Small, 63.0	63.0
indexLastUpdatedDate	String	Date on which the index was last updated.	Small, 63.0	63.0
itemLevelErrorsCount	Integer	Number of item-level errors.	Small, 63.0	63.0

Index Setting

Output representation of the retrieved index settings.

JSON example

```
{
  "errors": [],
  "metadata": {
    "activeLanguages": ["en_US", "ja", "es", "nl_NL"]
  },
  "setting": {
    "defaultLanguage": "en_US",
    "id": "1JySG000000GUb0AM",
    "supportedLanguages": ["en_US", "ja", "es", "nl_NL"]
  },
  "statusCode": "200"
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
errors	Error Output[]	List of errors, if any.	Small, 63.0	63.0

Property Name	Type	Description	Filter Group and Version	Available Version
metadata	Setting Metadata []	Metadata associated with the setting.	Small, 63.0	63.0
setting	Setting []	Setting that's used in indexing and maintained for an org.	Small, 63.0	63.0
statusCode	String	Code that indicates the status of the request.	Small, 63.0	63.0

Index Setting Update

Output representation of the details of the updated index setting.

JSON example

```
{
  "setting" : {
    "supportedLanguages" : ["en_US", "ja", "es", "nl_NL"],
    "id": "1JySG000000GUb0AM",
    "defaultLanguage" : "en_US"
  },
  "errors" : [],
  "statusCode" : "200"
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
errors	Error Output []	List of errors, if any.	Small, 63.0	63.0
setting	Setting []	Setting that's used in indexing and maintained for an org.	Small, 63.0	63.0
statusCode	String	Code that indicates the status of the API request.	Small, 63.0	63.0

Invalid Related Object Node

Output representation of the invalid related object node with details of errors.

JSON example

```
To add
```

Property Name	Type	Description	Filter Group and Version	Available Version
errorMessages	String[]	List of error messages.	Small, 62.0	62.0
relatedObject APIName	String	API name of the related object.	Small, 62.0	62.0

Metadata

Output representation of the metadata details for objects.

JSON example

```
"metadata": {
  "objectInfos": [
    {
      "fields": [
        {
          "dataType": "text",
          "isFacetableConfigurable": true,
          "isSearchableConfigurable": false,
          "label": "Product Name",
          "name": "Name",
          "type": "Standard"
        },
        {
          "dataType": "multilineetext",
          "isFacetableConfigurable": false,
          "isSearchableConfigurable": true,
          "label": "Product Description",
          "name": "Description",
          "type": "Standard"
        }
      ],
      "name": "Product2"
    },
    {
      "fields": [
        {
          "dataType": "stringplusclob",
          "label": "Description",
          "name": "Description",
          "type": "ProductAttributeDefinitionStandard"
        },
        {
          "dataType": "text",
          "label": "Name",
          "name": "Name",
          "type": "ProductAttributeDefinitionStandard"
        }
      ],
      "name": "ProductAttributeDefinition"
    }
  ]
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
objectInfos	Object Info[]	Metadata details for objects.	Small, 62.0	62.0

Object Info

Output representation of the object details along with its fields.

JSON example

```

"objectInfos": [
  {
    "fields": [
      {
        "dataType": "text",
        "isFacetableConfigurable": true,
        "isSearchableConfigurable": false,
        "label": "Product Name",
        "name": "Name",
        "type": "Standard"
      },
      {
        "dataType": "multilinetext",
        "isFacetableConfigurable": false,
        "isSearchableConfigurable": true,
        "label": "Product Description",
        "name": "Description",
        "type": "Standard"
      }
    ],
    "name": "Product2"
  },
  {
    "fields": [
      {
        "dataType": "stringplusclob",
        "label": "Description",
        "name": "Description",
        "type": "ProductAttributeDefinitionStandard"
      },
      {
        "dataType": "text",
        "label": "Name",
        "name": "Name",
        "type": "ProductAttributeDefinitionStandard"
      }
    ],
    "name": "ProductAttributeDefinition"
  }
]

```

Property Name	Type	Description	Filter Group and Version	Available Version
fields	Fields Info []	Fields of the object.	Small, 62.0	62.0
name	String	Name of the object.	Small, 62.0	62.0

Product Classification

Output representation of the product classification details.

JSON example

```
{
  "productClassification": {
    "id": "11BT10000004C9SMAU",
    "name": "class",
    "code": "code",
    "parentProductClassificationId": "11BDU0000004JXq2AM",
    "status": "Active"
  }
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
code	String	Code of the product classification record.	Small, 61.0	61.0
id	String	ID of the product classification record.	Small, 60.0	60.0
name	String	Name of the product classification record. If data translation is set up and specified in the org, the translated description is available.	Small, 61.0	61.0
parentProduct Classification Id	String	ID of the parent product classification.	Small, 65.0	65.0
status	String	Status of the product classification record.	Small, 61.0	61.0

Product Component Group

Output representation of the product component group.

JSON example

```
"productComponentGroups": [
  {
    "childGroups": [
      {
        "childGroups": [],
        "components": [
          {
            "additionalFields": {},
            "attributeCategory": [],
            "attributes": [],
            "catalogs": [],
            "categories": [],
            "childProducts": [],
            "id": "01txx0000006i2aAAA",
            "isActive": true,

```

```

"isAssetizable":true,
"isSoldOnlyWithOtherProds":true,
"name":"GenWatt Diesel 1000kW",
"nodeType":"simpleProduct",
"productCode":"GC1060",
"productComponentGroups":[],
"productRelatedComponent":
{
  "childProductId":"01txx0000006i2aAAA",
  "doesBundlePriceIncludeChild":true,
  "id":"0dSxx00000001P7EAI",
  "isComponentRequired":false,
  "isDefaultComponent":true,
  "isExcluded":false,
  "isQuantityEditable":false,
  "parentProductId":"01txx0000006iC8AAI",
  "productRelationshipTypeId":"0yoxx000000001dAAA",
  "quantity":1,
  "quantityScaleMethod":"Proportional"
},
"productSellingModelOptions":[]
},
{
  "additionalFields":{},
  "attributeCategory":[],
  "attributes":[],
  "catalogs":[],
  "categories":[],
  "childProducts":[],
  "id":"01txx0000006i2TAAQ",
  "isActive":true,
  "isAssetizable":true,
  "isSoldOnlyWithOtherProds":true,
  "name":"GenWatt Diesel 10kW",
  "nodeType":"simpleProduct",
  "productCode":"GC1020",
  "productComponentGroups":[],
  "productRelatedComponent":{
    "childProductId":"01txx0000006i2TAAQ",
    "doesBundlePriceIncludeChild":true,
    "id":"0dSxx00000001P8EAI",
    "isComponentRequired":false,
    "isDefaultComponent":true,
    "isExcluded":false,
    "isQuantityEditable":false,
    "parentProductId":"01txx0000006iC8AAI",
    "productRelationshipTypeId":"0yoxx000000001dAAA",
    "quantity":1,"quantityScaleMethod":"Proportional"
  },
  "productSellingModelOptions":[]
},
{
  "additionalFields":{},
  "attributeCategory":[],

```

```

    "attributes": [],
    "catalogs": [],
    "categories": [],
    "childProducts": [],
    "id": "01txx0000006i2SAAQ",
    "isActive": true,
    "isAssetizable": true,
    "isSoldOnlyWithOtherProds": true,
    "name": "GenWatt Diesel 200kW",
    "nodeType": "simpleProduct",
    "productCode": "GC1040",
    "productComponentGroups": [],
    "productRelatedComponent":
    {
      "childProductId": "01txx0000006i2SAAQ",
      "doesBundlePriceIncludeChild": true,
      "id": "0dSxx00000001P9EAI",
      "isComponentRequired": false,
      "isDefaultComponent": true,
      "isExcluded": false,
      "isQuantityEditable": false,
      "parentProductId": "01txx0000006iC8AAI",
      "productRelationshipTypeId": "0yoxx000000001dAAA",
      "quantity": 1,
      "quantityScaleMethod": "Proportional"
    },
    "productSellingModelOptions": []
  }
],
"parentGroup": {
  "id": "0y7xx0000000151AAA",
  "isExcluded": false,
  "name": "G1.1",
  "parentGroup": {
    "id": "0y7xx0000000149AAA",
    "parentProduct": {
      "id": "01txx0000006iC8AAI"
    }
  }
},
"components": [
  {
    "id": "0y7xx0000000149AAA",
    "isExcluded": false,
    "name": "G1",
    "parentProduct": {
      "id": "01txx0000006iC8AAI"
    }
  }
]

```

Property Name	Type	Description	Filter Group and Version	Available Version
code	String	Unique code of the product component group, which is used only during design time.	Small, 60.0	60.0
components	Product[]	List of the product details.	Small, 60.0	60.0

Property Name	Type	Description	Filter Group and Version	Available Version
childGroups	Product Component Group[]	List of child product components groups.	Small, 62.0	62.0
description	String	Description of the product component group.	Small, 60.0	60.0
id	String	ID of the record.	Small, 60.0	60.0
isExcluded	Boolean	Indicates whether the product component group is excluded from the product bundle for selection in the run time (<code>true</code>) or not (<code>false</code>).	Small, 60.0	60.0
maxBundle Components	Integer	Maximum number of product components that can be added to a group.	Small, 60.0	60.0
minBundle Components	Integer	Minimum number of product components that can be added to a group.	Small, 60.0	60.0
name	String	Name of the record. If data translation is set up and specified in the org, the translated description is available.	Small, 60.0	60.0
parentProduct Id	String	ID associated with the parent product record.	Small, 60.0	60.0
parentGroupId	String	ID of the parent group record.	Small, 62.0	62.0
sequence	Integer	Order in which the groups are listed in the bundle.	Small, 60.0	60.0

Product

Output representation of the product definition.

JSON example

This example shows a sample of the Product List (POST) API response.

```
{
  "products": [
    {
      "additionalFields": {
        "code__c": "SWX445"
      },
      "attributeCategory": [
        {
          "attributes": [
            {
              "additionalFields": {
                "scope": "Order"
              },
              "attributeNameOverride": "AD Text",

```

```

        "code": "AD02",
        "dataType": "Text",
        "displayType": "Text",
        "MinimumCharacterCount": "1",
        "MaximumCharacterCount": "20",
        "defaultValue": "AD Text DV",
        "description": "AD Text Desc",
        "helpText": "AD Text DHT",
        "id": "0tjT100000002bIAA",
        "isHidden": false,
        "isPriceImpacting": true,
        "isReadOnly": true,
        "isRequired": true,
        "label": "AD Text Label",
        "name": "AD Text",
        "sequence": 1,
        "status": "Active",
        "valueDescription": "AD Text VD"
    }
],
"code": "AC001",
"id": "0v3T1000000000BIAQ",
"name": "build and make"
}
],
"attributes": [
{
    "additionalFields": {
        "scope": "SWX445"
    },
    "attributeNameOverride": "AD Picklist",
    "code": "AD001",
    "dataType": "Picklist",
    "defaultValue": "Red",
    "description": "AD Picklist Description",
    "helpText": "AD Picklist DHT",
    "id": "0tjT1000000002WIAQ",
    "isHidden": false,
    "isPriceImpacting": false,
    "isReadOnly": false,
    "isRequired": true,
    "label": "AD Picklist Label",
    "name": "AD Picklist",
    "picklist": {
        "dataType": "Text",
        "description": "APV Description",
        "id": "0v5T1000000001IAA",
        "name": "Color",
        "values": [
            {
                "abbreviation": "Blue Abb",
                "code": "APV03",
                "displayValue": "Blue DV",
                "id": "0v6T10000000006IAA",

```



```

        "name": "Blue",
        "sequence": "3",
        "value": "Blue b",
        "status": "Active"
    },
    {
        "abbreviation": "Red Abb",
        "code": "APV04",
        "displayValue": "Red",
        "id": "0v6T1000000001IAA",
        "name": "Red",
        "sequence": "4",
        "value": "Red",
        "status": "Active"
    },
    {
        "abbreviation": "One Abb",
        "code": "APV02",
        "displayValue": "One DV",
        "id": "0v6T1000000000uIAA",
        "name": "One",
        "sequence": "2",
        "value": "One 1",
        "status": "Active"
    },
    {
        "abbreviation": "Red Abbreviation",
        "code": "APV01",
        "displayValue": "Red Display Value",
        "id": "0v6T1000000001OIAQ",
        "name": "Red",
        "sequence": "1",
        "value": "red12",
        "status": "Active"
    }
]
},
"sequence": 1,
"status": "Active",
"valueDescription": "AD Picklist VD"
}
],
"categories": [],
"childProducts": [
    {
        "attributeCategory": [],
        "attributes": [],
        "categories": [],
        "childProducts": [],
        "configureDuringSale": "NotAllowed",
        "id": "01tz7000000AJkaIAG",
        "isActive": false,
        "isAssetizable": true,
        "isSoldOnlyWithOtherProds": false,

```

```

    "name": "Earphones",
    "nodeType": "bundleProduct",
    "productComponentGroups": [],
    "productRelatedComponent": {
      "childProductId": "01tZ7000000AJkaIAG",
      "doesBundlePriceIncludeChild": true,
      "id": "0dSZ70000000cdMAA",
      "isComponentRequired": false,
      "isDefaultComponent": true,
      "isExcluded": false,
      "isQuantityEditable": false,
      "parentProductId": "01tZ7000000AJXOIA4",
      "productRelationshipTypeId": "0yoZ700000000kPIAQ",
      "quantity": 1,
      "quantityScaleMethod": "Proportional"
    },
    "productSellingModelOptions": []
  }
],
  "description": "Keep your organization connected with seamless collaboration across distributed teams. No matter where employees are located, organizations are seeking stronger employee engagement and customer experiences to enable more productivity and greater business agility. More effective collaboration helps organizations work smarter.",

  "displayUrl":
  "https://dispatch.m.io/wp-content/uploads/2023/01/History-of-Webex.png",
  "id": "01t1Q000008CD2eQAG",
  "isActive": true,
  "isAssetizable": true,
  "isSoldOnlyWithOtherProds": false,
  "name": "SmartBytes Collaboration Suite",
  "nodeType": "bundleProduct",
  "productClassification": {
    "id": "11B1Q0000008OMGUA2"
  },
  "productCode": "P0143",
  "productComponentGroups": [
    {
      "components": [
        {
          "attributeCategory": [],
          "attributes": [],
          "categories": [],
          "childProducts": [],
          "id": "01tZ7000000AJXTIA4",
          "isActive": false,
          "isAssetizable": true,
          "isSoldOnlyWithOtherProds": false,
          "name": "Charger",
          "nodeType": "bundleProduct",
          "productComponentGroups": [],
          "productRelatedComponent": {
            "childProductId": "01tZ7000000AJXTIA4",
            "doesBundlePriceIncludeChild": true,

```

```

        "id": "0dsZ700000000YLMAY",
        "isComponentRequired": false,
        "isDefaultComponent": true,
        "isExcluded": false,
        "isQuantityEditable": false,
        "parentProductId": "01tZ70000000AJXOIA4",
        "productRelationshipTypeId": "0yoZ700000000kPIAQ",
        "quantity": 1,
        "quantityScaleMethod": "Proportional"
    },
    "productSellingModelOptions": []
  }
],
"parentProductId": "01tZ70000000AJXOIA4"
}
],
"productSellingModelOptions": [
  {
    "id": "0iO1Q0000008OkeUAE",
    "productId": "01t1Q000008CD2eQAG",
    "productSellingModel": {
      "id": "0jP1Q000000CaVFUA0",
      "isDefault": true,
      "name": "One Time",
      "sellingModelType": "OneTime",
      "status": "Active"
    }
  }
],
"productSpecificationType": {
  "name": "None"
}
},
"status": {
  "code": "200",
  "correlationId": "fd158d80-d73c-4a1f-a009-9225db804d70",
  "errors": [],
  "message": "Successfully fetched product records."
}
}

```

This example shows a sample of the Bulk Product Details (POST) API response.

```

{
  "products": [
    {
      "additionalFields": {
        "code__c": "SWX445"
      },
      "attributeCategory": [
        {

```

```

    "attributes": [
      {
        "additionalFields": {
          "scope": "Order"
        },
        "attributeNameOverride": "AD Text",
        "code": "AD02",
        "dataType": "Text",
        "displayType": "Text",
        "minimumCharacterCount": "1",
        "maximumCharacterCount": "20",
        "defaultValue": "AD Text DV",
        "description": "AD Text Desc",
        "helpText": "AD Text DHT",
        "id": "0tjT1000000002bIAA",
        "isHidden": false,
        "isPriceImpacting": true,
        "isReadOnly": true,
        "isRequired": true,
        "label": "AD Text Label",
        "name": "AD Text",
        "sequence": 1,
        "status": "Active",
        "valueDescription": "AD Text VD"
      }
    ],
    "code": "AC001",
    "id": "0v3T1000000000BIAQ",
    "name": "build and make"
  }
],
"attributes": [
  {
    "additionalFields": {
      "scope": "SWX445"
    },
    "attributeNameOverride": "AD Picklist",
    "code": "AD001",
    "dataType": "Picklist",
    "defaultValue": "Red",
    "description": "AD Picklist Description",
    "helpText": "AD Picklist DHT",
    "id": "0tjT1000000002WIAQ",
    "isHidden": false,
    "isPriceImpacting": false,
    "isReadOnly": false,
    "isRequired": true,
    "label": "AD Picklist Label",
    "name": "AD Picklist",
    "picklist": {
      "dataType": "Text",
      "description": "APV Description",
      "id": "0v5T10000000001IAA",
      "name": "Color",

```

```

    "values": [
      {
        "abbreviation": "Blue Abb",
        "code": "APV03",
        "displayValue": "Blue DV",
        "id": "0v6T10000000006IAA",
        "name": "Blue",
        "sequence": "3",
        "value": "Blue b",
        "status": "Active"
      },
      {
        "abbreviation": "Red Abb",
        "code": "APV04",
        "displayValue": "Red",
        "id": "0v6T10000000001IAA",
        "name": "Red",
        "sequence": "4",
        "value": "Red",
        "status": "Active"
      },
      {
        "abbreviation": "One Abb",
        "code": "APV02",
        "displayValue": "One DV",
        "id": "0v6T1000000000uIAA",
        "name": "One",
        "sequence": "2",
        "value": "One 1",
        "status": "Active"
      },
      {
        "abbreviation": "Red Abbreviation",
        "code": "APV01",
        "displayValue": "Red Display Value",
        "id": "0v6T1000000001OIAQ",
        "name": "Red",
        "sequence": "1",
        "value": "red12",
        "status": "Active"
      }
    ]
  },
  "sequence": 1,
  "status": "Active",
  "valueDescription": "AD Picklist VD"
}
],
"categories": [],
"childProducts": [
  {
    "attributeCategory": [],
    "attributes": [],
    "categories": [],

```

```

    "childProducts": [],
    "configureDuringSale": "NotAllowed",
    "id": "01tZ7000000AJkaIAG",
    "isActive": false,
    "isAssetizable": true,
    "isSoldOnlyWithOtherProds": false,
    "name": "Earphones",
    "nodeType": "bundleProduct",
    "productComponentGroups": [],
    "productRelatedComponent": {
      "childProductId": "01tZ7000000AJkaIAG",
      "doesBundlePriceIncludeChild": true,
      "id": "0dSZ700000000cdMAA",
      "isComponentRequired": false,
      "isDefaultComponent": true,
      "isExcluded": false,
      "isQuantityEditable": false,
      "parentProductId": "01tZ7000000AJXOIA4",
      "productRelationshipTypeId": "0yoZ700000000kPIAQ",
      "quantity": 1,
      "quantityScaleMethod": "Proportional"
    },
    "productSellingModelOptions": []
  }
],
"description": "Keep your organization connected with seamless collaboration across distributed teams. No matter where employees are located, organizations are seeking stronger employee engagement and customer experiences to enable more productivity and greater business agility. More effective collaboration helps organizations work smarter.",

"displayUrl":
"https://dispatch.m.io/wp-content/uploads/2023/01/History-of-Webex.png",
"id": "01t1Q000008CD2eQAG",
"isActive": true,
"isAssetizable": true,
"isSoldOnlyWithOtherProds": false,
"name": "SmartBytes Collaboration Suite",
"nodeType": "bundleProduct",
"productClassification": {
  "id": "11B1Q000008OMGUA2",
  "name": "class",
  "code": "code",
  "status": "Active"
},
"productCode": "P0143",
"productComponentGroups": [
  {
    "components": [
      {
        "attributeCategory": [],
        "attributes": [],
        "categories": [],
        "childProducts": [],
        "id": "01tZ7000000AJXTIA4",

```

```

        "isActive": false,
        "isAssetizable": true,
        "isSoldOnlyWithOtherProds": false,
        "name": "Charger",
        "nodeType": "bundleProduct",
        "productComponentGroups": [],
        "productRelatedComponent": {
          "childProductId": "01tZ7000000AJXTIA4",
          "doesBundlePriceIncludeChild": true,
          "id": "0dsZ700000000YLMAY",
          "isComponentRequired": false,
          "isDefaultComponent": true,
          "isExcluded": false,
          "isQuantityEditable": false,
          "parentProductId": "01tZ7000000AJXOIA4",
          "productRelationshipTypeId": "0yoZ700000000kPIAQ",
          "quantity": 1,
          "quantityScaleMethod": "Proportional"
        },
        "productSellingModelOptions": []
      }
    ],
    "id": "0y7Z700000000TtIAI",
    "isExcluded": false,
    "name": "Box",
    "parentProductId": "01tZ7000000AJXOIA4"
  }
],
"productSellingModelOptions": [
  {
    "id": "0iO1Q0000008OkeUAE",
    "productId": "01t1Q000008CD2eQAG",
    "productSellingModel": {
      "id": "0jP1Q000000CaVFUA0",
      "isDefault": true,
      "name": "One Time",
      "sellingModelType": "OneTime",
      "status": "Active"
    }
  }
],
"productSpecificationType": {
  "name": "None"
}
}
],
"status": {
  "code": "200",
  "correlationId": "fd158d80-d73c-4a1f-a009-9225db804d70",
  "errors": [],
  "message": "Successfully fetched product records."
}
}

```

This example shows a sample of the Product By ID (GET) API response.

```
{
  "products": [
    {
      "attributeCategory": [
        {
          "attributes": [
            {
              "attributeNameOverride": "AD Text",
              "code": "AD02",
              "dataType": "Text",
              "displayType": "Text",
              "minimumCharacterCount": "1",
              "maximumCharacterCount": "20",
              "defaultValue": "AD Text DV",
              "description": "AD Text Desc",
              "helpText": "AD Text DHT",
              "id": "0tjT100000002bIAA",
              "isHidden": false,
              "isPriceImpacting": true,
              "isReadOnly": true,
              "isRequired": true,
              "label": "AD Text Label",
              "name": "AD Text",
              "sequence": 1,
              "status": "Active",
              "valueDescription": "AD Text VD"
            }
          ],
          "code": "AC001",
          "id": "0v3T1000000000BIAQ",
          "name": "build and make"
        }
      ],
      "attributes": [
        {
          "attributeNameOverride": "AD Picklist",
          "code": "AD001",
          "dataType": "Picklist",
          "defaultValue": "Red",
          "description": "AD Picklist Description",
          "helpText": "AD Picklist DHT",
          "id": "0tjT1000000002WIAQ",
          "isHidden": false,
          "isPriceImpacting": false,
          "isReadOnly": false,
          "isRequired": true,
          "label": "AD Picklist Label",
          "name": "AD Picklist",
          "picklist": {
            "dataType": "Text",
            "description": "APV Description",
            "id": "0v5T10000000001IAA",
            "name": "Color",

```



```

    "values": [
      {
        "abbreviation": "Blue Abb",
        "code": "APV03",
        "displayValue": "Blue DV",
        "id": "0v6T10000000006IAA",
        "name": "Blue",
        "sequence": "3",
        "value": "Blue b",
        "status": "Active"
      },
      {
        "abbreviation": "Red Abb",
        "code": "APV04",
        "displayValue": "Red",
        "id": "0v6T10000000001IAA",
        "name": "Red",
        "sequence": "4",
        "value": "Red",
        "status": "Active"
      },
      {
        "abbreviation": "One Abb",
        "code": "APV02",
        "displayValue": "One DV",
        "id": "0v6T1000000000uIAA",
        "name": "One",
        "sequence": "2",
        "value": "One 1",
        "status": "Active"
      },
      {
        "abbreviation": "Red Abbreviation",
        "code": "APV01",
        "displayValue": "Red Display Value",
        "id": "0v6T10000000010IAQ",
        "name": "Red",
        "sequence": "1",
        "value": "red12",
        "status": "Active"
      }
    ]
  },
  "sequence": 1,
  "status": "Active",
  "valueDescription": "AD Picklist VD"
}
],
"availabilityDate": "2023-07-12T19:00:00.000Z",
"categories": [],
"childProducts": [],
"configureDuringSale": "Allowed",
"description": "Bundle Product Description",
"discontinuedDate": "2023-07-27T19:00:00.000Z",

```

```

"displayUrl": "www.google.com",
"endOfLifeDate": "2023-07-31T19:00:00.000Z",
"id": "01tT1000000F0afIAC",
"isActive": true,
"isAssetizable": true,
"isSoldOnlyWithOtherProds": true,
"name": "Bundle Product",
"nodeType": "bundleProduct",
"productClassification": {
  "id": "11BT10000004C9SMAU",
  "name" : "class",
  "code" : "code",
  "status" : "Active"
},
"productCode": "P001",
"productComponentGroups": [
  {
    "code": "PCG002",
    "components": [
      {
        "attributeCategory": [],
        "attributes": [],
        "categories": [],
        "childProducts": [],
        "nodeType": "productClass",
        "productClassification": {
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          "name" : "class",
          "code" : "code",
          "status" : "Active"
        },
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        "productRelatedComponent": {
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          "doesBundlePriceIncludeChild": true,
          "id": "0dST100000000rlMAA",
          "isComponentRequired": false,
          "isDefaultComponent": false,
          "isQuantityEditable": true,
          "maxQuantity": 5,
          "minQuantity": 1,
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          "productRelationshipTypeId": "0yoT10000004CBEIA2",
          "quantity": 1,
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          "sequence": 2,
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        "productSellingModelOptions": []
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    ],
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    "id": "0y7T10000004C9IIAU",

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    "minBundleComponents": 1,
    "name": "PCG002",
    "parentProductId": "01tT1000000F0afIAC",
    "sequence": 2,
    "isExcluded": false
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    "code": "PCG001",
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        "attributeCategory": [],
        "attributes": [
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            "attributeNameOverride": "AD Picklist",
            "code": "AD001",
            "dataType": "Picklist",
            "defaultValue": "Red",
            "description": "AD Picklist Description",
            "helpText": "AD Picklist DHT",
            "id": "0tjT100000002WIAQ",
            "isHidden": false,
            "isPriceImpacting": false,
            "isReadOnly": false,
            "isRequired": true,
            "label": "AD Picklist Label",
            "name": "AD Picklist",
            "picklist": {
              "dataType": "Text",
              "description": "APV Description",
              "id": "0v5T1000000001IAA",
              "name": "Color",
              "values": [
                {
                  "abbreviation": "Blue Abb",
                  "code": "APV03",
                  "displayValue": "Blue DV",
                  "id": "0v6T1000000006IAA",
                  "name": "Blue",
                  "sequence": "3",
                  "value": "Blue b",
                  "status": "Active"
                },
                {
                  "abbreviation": "Red Abb",
                  "code": "APV04",
                  "displayValue": "Red",
                  "id": "0v6T1000000001IAA",
                  "name": "Red",
                  "sequence": "4",
                  "value": "Red",
                  "status": "Active"
                }
              ]
            }
          }
        ]
      }
    ]
  }

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        "abbreviation": "One Abb",
        "code": "APV02",
        "displayValue": "One DV",
        "id": "0v6T100000000uIAA",
        "name": "One",
        "sequence": "2",
        "value": "One 1",
        "status": "Active"
    },
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        "code": "APV01",
        "displayValue": "Red Display Value",
        "id": "0v6T1000000001OIAQ",
        "name": "Red",
        "sequence": "1",
        "value": "red12",
        "status": "Active"
    }
]
},
"sequence": 1,
"status": "Active",
"valueDescription": "AD Picklist VD"
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    "code": "AD02",
    "dataType": "Text",
    "displayType": "Text",
    "minimumCharacterCount": "1",
    "maximumCharacterCount": "20",
    "defaultValue": "AD Text DV",
    "description": "AD Text Desc",
    "helpText": "AD Text DHT",
    "id": "0tjT1000000002bIAA",
    "isHidden": false,
    "isPriceImpacting": false,
    "isReadOnly": false,
    "isRequired": true,
    "label": "AD Text Label",
    "name": "AD Text",
    "status": "Active",
    "valueDescription": "AD Text VD"
}
],
"availabilityDate": "2023-07-17T19:00:00.000Z",
"categories": [],
"childProducts": [],
"configureDuringSale": "Allowed",
"description": "P003 desc",
"discontinuedDate": "2023-07-19T19:00:00.000Z",
"displayUrl": "www.google.com",
"endOfLifeDate": "2023-07-28T19:00:00.000Z",

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    "isAssetizable": true,
    "isSoldOnlyWithOtherProds": false,
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    "nodeType": "bundleProduct",
    "productClassification": {
      "id": "11BT10000004C9SMAU",
      "name" : "class",
      "code" : "code",
      "status" : "Active"
    },
    "productCode": "P003",
    "productComponentGroups": [
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        "code": "PCG2",
        "components": [
          {
            "attributeCategory": [],
            "attributes": [],
            "categories": [],
            "childProducts": [],
            "id": "01tT1000000F0Z8IAK",
            "isActive": false,
            "isAssetizable": true,
            "isSoldOnlyWithOtherProds": false,
            "name": "Super Child2 - Bundle with PCG",
            "nodeType": "bundleProduct",
            "productComponentGroups": [],
            "productRelatedComponent": {
              "childProductId": "01tT1000000F0Z8IAK",
              "doesBundlePriceIncludeChild": true,
              "id": "0dST100000000rWMAQ",
              "isComponentRequired": false,
              "isDefaultComponent": false,
              "isQuantityEditable": false,
              "parentProductId": "01tT1000000F0YyIAK",
              "productRelationshipTypeId": "0yoT1000000002WIAQ",
              "quantity": 1,
              "quantityScaleMethod": "Proportional",
              "sequence": 2,
              "isExcluded": false
            },
          },
          {
            "productSellingModelOptions": [],
            "productSpecificationType": {
              "name": "NonCommercialSpecType",
              "productSpecificationRecordType": null
            }
          }
        ],
      },
      {
        "attributeCategory": [],
        "attributes": [],
        "availabilityDate": "2023-07-15T19:00:00.000Z",
        "categories": [],

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    "discontinuedDate": "2023-07-16T19:00:00.000Z",
    "displayUrl": "Test",
    "endOfLifeDate": "2023-07-17T19:00:00.000Z",
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    "isActive": false,
    "isAssetizable": true,
    "isSoldOnlyWithOtherProds": false,
    "name": "SuperChild1 - Bundle with PCG",
    "nodeType": "bundleProduct",
    "productCode": "Test",
    "productComponentGroups": [],
    "productRelatedComponent": {
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      "doesBundlePriceIncludeChild": true,
      "id": "0dST10000000rXMAQ",
      "isComponentRequired": false,
      "isDefaultComponent": false,
      "isQuantityEditable": false,
      "parentProductId": "01tT1000000F0YyIAK",
      "productRelationshipTypeId": "0yoT1000000002WIAQ",
      "quantity": 1,
      "quantityScaleMethod": "Proportional",
      "sequence": 1,
      "isExcluded": false
    },
    "productSellingModelOptions": [],
    "productSpecificationType": {
      "name": "NonCommercialSpecType",
      "productSpecificationRecordType": null
    }
  },
  {
    "attributeCategory": [],
    "attributes": [],
    "categories": [],
    "childProducts": [],
    "configureDuringSale": "Allowed",
    "id": "01tT1000000F0apIAC",
    "isActive": false,
    "isAssetizable": true,
    "isSoldOnlyWithOtherProds": false,
    "name": "Bundle2",
    "nodeType": "bundleProduct",
    "productCode": "PC003",
    "productComponentGroups": [],
    "productRelatedComponent": {
      "childProductId": "01tT1000000F0apIAC",
      "doesBundlePriceIncludeChild": true,
      "id": "0dST10000000rqMAA",
      "isComponentRequired": false,
      "isDefaultComponent": false,
      "isQuantityEditable": false,

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        "parentProductId": "01tT1000000F0YyIAK",
        "productRelationshipTypeId": "0yoT1000000002WIAQ",
        "quantity": 1,
        "quantityScaleMethod": "Proportional",
        "isExcluded": false
    },
    "productSellingModelOptions": [],
    "productSpecificationType": {
        "name": "NonCommercialSpecType",
        "productSpecificationRecordType": null
    }
}
],
"description": "Group for components at level 2",
"id": "0y7T10000004C98IAE",
"maxBundleComponents": 5,
"minBundleComponents": 1,
"name": "PCG2",
"parentProductId": "01tT1000000F0YyIAK",
"isExcluded": false
}
],
"productRelatedComponent": {
    "childProductId": "01tT1000000F0YyIAK",
    "childSellingModelId": "0jPT10000004CAfMAM",
    "doesBundlePriceIncludeChild": true,
    "id": "0dST100000000rgMAA",
    "isComponentRequired": false,
    "isDefaultComponent": false,
    "isQuantityEditable": true,
    "maxQuantity": 3,
    "minQuantity": 1,
    "parentProductId": "01tT1000000F0afIAC",
    "parentSellingModelId": "0jPT10000004CAfMAM",
    "productRelationshipTypeId": "0yoT1000000002WIAQ",
    "quantity": 1,
    "quantityScaleMethod": "Proportional",
    "sequence": 1,
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},
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    {
        "id": "0iOT10000004CmMAM",
        "productId": "01tT1000000F0YyIAK",
        "isDefault": false,
        "productSellingModel": {
            "id": "0jPT10000004CAfMAM",
            "name": "OneTimePSM",
            "sellingModelType": "OneTime",
            "status": "Active"
        }
    }
]
],
"productSpecificationType": {

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        "name": "NonCommercialSpecType",
        "productSpecificationRecordType": null
    }
}
],
"description": "PCG001 Description",
"id": "0y7T10000004C9DIAU",
"maxBundleComponents": 5,
"minBundleComponents": 1,
"name": "PCG001",
"parentProductId": "01tT1000000F0afiAC",
"sequence": 1,
"isExcluded": false
}
],
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{
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    "productId": "01tT1000000F0afiAC",
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        "id": "0jPT10000004CAfMAM",
        "name": "OneTimePSM",
        "sellingModelType": "OneTime",
        "status": "Active"
    }
}
],
"productSpecificationType": {
    "name": "NonCommercialSpecType",
    "productSpecificationRecordType": null
}
},
{
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                    "code": "AD02",
                    "dataType": "Text",
                    "displayType": "Text",
                    "minimumCharacterCount": "1",
                    "maximumCharacterCount": "20",
                    "defaultValue": "AD Text DV",
                    "description": "AD Text Desc",
                    "helpText": "AD Text DHT",
                    "id": "0tjT1000000002bIAA",
                    "isHidden": false,
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                    "isReadOnly": true,
                    "isRequired": true,
                    "label": "AD Text Label",
                    "name": "AD Text",
                    "sequence": 1,
                }
            ]
        }
    ]
}

```



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        "status": "Active",
        "valueDescription": "AD Text VD"
    }
],
"code": "AC001",
"id": "0v3T1000000000BIAQ",
"name": "build and make"
}
],
"attributes": [
{
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    "code": "AD001",
    "dataType": "Picklist",
    "defaultValue": "Red",
    "description": "AD Picklist Description",
    "helpText": "AD Picklist DHT",
    "id": "0tjT1000000002WIAQ",
    "isHidden": false,
    "isPriceImpacting": false,
    "isReadOnly": false,
    "isRequired": true,
    "label": "AD Picklist Label",
    "name": "AD Picklist",
    "picklist": {
        "dataType": "Text",
        "description": "APV Description",
        "id": "0v5T10000000001IAA",
        "name": "Color",
        "values": [
            {
                "abbreviation": "Blue Abb",
                "code": "APV03",
                "displayValue": "Blue DV",
                "id": "0v6T10000000006IAA",
                "name": "Blue",
                "sequence": "3",
                "value": "Blue b",
                "status": "Active"
            },
            {
                "abbreviation": "Red Abb",
                "code": "APV04",
                "displayValue": "Red",
                "id": "0v6T10000000001IAA",
                "name": "Red",
                "sequence": "4",
                "value": "Red",
                "status": "Active"
            },
            {
                "abbreviation": "One Abb",
                "code": "APV02",
                "displayValue": "One DV",
            }
        ]
    }
}

```

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        "id": "0v6T1000000000uIAA",
        "name": "One",
        "sequence": "2",
        "value": "One 1",
        "status": "Active"
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        "abbreviation": "Red Abbreviation",
        "code": "APV01",
        "displayValue": "Red Display Value",
        "id": "0v6T1000000001OIAQ",
        "name": "Red",
        "sequence": "1",
        "value": "red12",
        "status": "Active"
    }
]
},
"sequence": 1,
"status": "Active",
"valueDescription": "AD Picklist VD"
}
],
"availabilityDate": "2023-07-12T19:00:00.000Z",
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"childProducts": [],
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"description": "Bundle Product Description",
"discontinuedDate": "2023-07-27T19:00:00.000Z",
"displayUrl": "www.google.com",
"endOfLifeDate": "2023-07-31T19:00:00.000Z",
"id": "01tT1000000F0afiAC",
"isActive": true,
"isAssetizable": true,
"isSoldOnlyWithOtherProds": true,
"name": "Bundle Product",
"nodeType": "bundleProduct",
"productClassification": {
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    "name": "class",
    "code": "code",
    "status": "Active"
},
"productCode": "P001",
"productComponentGroups": [
    {
        "code": "PCG002",
        "components": [
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                "attributeCategory": [],
                "attributes": [],
                "categories": [],
                "childProducts": [],
                "nodeType": "productClass",

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      "id": "11BT10000004C9SMAU",
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      "code" : "code",
      "status" : "Active"
    },
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    "productRelatedComponent": {
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      "doesBundlePriceIncludeChild": true,
      "id": "0dST100000000rlMAA",
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      "isDefaultComponent": false,
      "isQuantityEditable": true,
      "maxQuantity": 5,
      "minQuantity": 1,
      "parentProductId": "01tT1000000F0afiAC",
      "productClassificationId": "11BT10000004C9SMAU",
      "productRelationshipTypeId": "0yoT10000004CBEIA2",
      "quantity": 1,
      "quantityScaleMethod": "Proportional",
      "sequence": 2,
      "isExcluded": false
    },
    "productSellingModelOptions": []
  }
],
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"id": "0y7T10000004C9IIAU",
"maxBundleComponents": 5,
"minBundleComponents": 1,
"name": "PCG002",
"parentProductId": "01tT1000000F0afiAC",
"sequence": 2,
"isExcluded": false
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{
  "code": "PCG001",
  "components": [
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      "attributeCategory": [],
      "attributes": [
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          "code": "AD001",
          "dataType": "Picklist",
          "defaultValue": "Red",
          "description": "AD Picklist Description",
          "helpText": "AD Picklist DHT",
          "id": "0tjT1000000002WIAQ",
          "isHidden": false,
          "isPriceImpacting": false,
          "isReadOnly": false,
          "isRequired": true,

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"label": "AD Picklist Label",
"name": "AD Picklist",
"picklist": {
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  "id": "0v5T10000000001IAA",
  "name": "Color",
  "values": [
    {
      "abbreviation": "Blue Abb",
      "code": "APV03",
      "displayValue": "Blue DV",
      "id": "0v6T10000000006IAA",
      "name": "Blue",
      "sequence": "3",
      "value": "Blue b",
      "status": "Active"
    },
    {
      "abbreviation": "Red Abb",
      "code": "APV04",
      "displayValue": "Red",
      "id": "0v6T10000000001IAA",
      "name": "Red",
      "sequence": "4",
      "value": "Red",
      "status": "Active"
    },
    {
      "abbreviation": "One Abb",
      "code": "APV02",
      "displayValue": "One DV",
      "id": "0v6T1000000000uIAA",
      "name": "One",
      "sequence": "2",
      "value": "One 1",
      "status": "Active"
    },
    {
      "abbreviation": "Red Abbreviation",
      "code": "APV01",
      "displayValue": "Red Display Value",
      "id": "0v6T10000000010IAQ",
      "name": "Red",
      "sequence": "1",
      "value": "red12",
      "status": "Active"
    }
  ]
},
"sequence": 1,
"status": "Active",
"valueDescription": "AD Picklist VD"
},

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      "displayType": "Text",
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      "maximumCharacterCount": "20",
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      "helpText": "AD Text DHT",
      "id": "0tjT100000002bIAA",
      "isHidden": false,
      "isPriceImpacting": false,
      "isReadOnly": false,
      "isRequired": true,
      "label": "AD Text Label",
      "name": "AD Text",
      "status": "Active",
      "valueDescription": "AD Text VD"
    }
  ],
  "availabilityDate": "2023-07-17T19:00:00.000Z",
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  "configureDuringSale": "Allowed",
  "description": "P003 desc",
  "discontinuedDate": "2023-07-19T19:00:00.000Z",
  "displayUrl": "www.google.com",
  "endOfLifeDate": "2023-07-28T19:00:00.000Z",
  "id": "01tT1000000F0YyIAK",
  "isActive": false,
  "isAssetizable": true,
  "isSoldOnlyWithOtherProds": false,
  "name": "Child1 - Bundle with PCG",
  "nodeType": "bundleProduct",
  "productClassification": {
    "id": "11BT10000004C9SMAU",
    "name": "class",
    "code": "code",
    "status": "Active"
  },
  "productCode": "P003",
  "productComponentGroups": [
    {
      "code": "PCG2",
      "components": [
        {
          "attributeCategory": [],
          "attributes": [],
          "categories": [],
          "childProducts": [],
          "id": "01tT1000000F0Z8IAK",
          "isActive": false,
          "isAssetizable": true,

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    "isSoldOnlyWithOtherProds": false,
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    "nodeType": "bundleProduct",
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      "doesBundlePriceIncludeChild": true,
      "id": "0dST10000000rWMAQ",
      "isComponentRequired": false,
      "isDefaultComponent": false,
      "isQuantityEditable": false,
      "parentProductId": "01tT1000000F0YyIAK",
      "productRelationshipTypeId": "0yoT1000000002WIAQ",
      "quantity": 1,
      "quantityScaleMethod": "Proportional",
      "sequence": 2,
      "isExcluded": false
    },
    "productSellingModelOptions": [],
    "productSpecificationType": {
      "name": "NonCommercialSpecType",
      "productSpecificationRecordType": null
    }
  },
  {
    "attributeCategory": [],
    "attributes": [],
    "availabilityDate": "2023-07-15T19:00:00.000Z",
    "categories": [],
    "childProducts": [],
    "configureDuringSale": "Allowed",
    "discontinuedDate": "2023-07-16T19:00:00.000Z",
    "displayUrl": "Test",
    "endOfLifeDate": "2023-07-17T19:00:00.000Z",
    "id": "01tT1000000F0YzIAK",
    "isActive": false,
    "isAssetizable": true,
    "isSoldOnlyWithOtherProds": false,
    "name": "SuperChild1 - Bundle with PCG",
    "nodeType": "bundleProduct",
    "productCode": "Test",
    "productComponentGroups": [],
    "productRelatedComponent": {
      "childProductId": "01tT1000000F0YzIAK",
      "doesBundlePriceIncludeChild": true,
      "id": "0dST10000000rXMAQ",
      "isComponentRequired": false,
      "isDefaultComponent": false,
      "isQuantityEditable": false,
      "parentProductId": "01tT1000000F0YyIAK",
      "productRelationshipTypeId": "0yoT1000000002WIAQ",
      "quantity": 1,
      "quantityScaleMethod": "Proportional",
      "sequence": 1,
    }
  }
}

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```

        "isExcluded": false
      },
      "productSellingModelOptions": [],
      "productSpecificationType": {
        "name": "NonCommercialSpecType",
        "productSpecificationRecordType": null
      }
    },
    {
      "attributeCategory": [],
      "attributes": [],
      "categories": [],
      "childProducts": [],
      "configureDuringSale": "Allowed",
      "id": "01tT1000000F0apIAC",
      "isActive": false,
      "isAssetizable": true,
      "isSoldOnlyWithOtherProds": false,
      "name": "Bundle2",
      "nodeType": "bundleProduct",
      "productCode": "PC003",
      "productComponentGroups": [],
      "productRelatedComponent": {
        "childProductId": "01tT1000000F0apIAC",
        "doesBundlePriceIncludeChild": true,
        "id": "0dST100000000rqMAA",
        "isComponentRequired": false,
        "isDefaultComponent": false,
        "isQuantityEditable": false,
        "parentProductId": "01tT1000000F0YyIAK",
        "productRelationshipTypeId": "0yoT1000000002WIAQ",
        "quantity": 1,
        "quantityScaleMethod": "Proportional",
        "isExcluded": false
      },
      "productSellingModelOptions": [],
      "productSpecificationType": {
        "name": "NonCommercialSpecType",
        "productSpecificationRecordType": null
      }
    }
  ],
  "description": "Group for components at level 2",
  "id": "0y7T10000004C98IAE",
  "maxBundleComponents": 5,
  "minBundleComponents": 1,
  "name": "PCG2",
  "parentProductId": "01tT1000000F0YyIAK",
  "isExcluded": false
}
],
"productRelatedComponent": {
  "childProductId": "01tT1000000F0YyIAK",
  "childSellingModelId": "0jPT10000004CAfMAM",

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```

        "doesBundlePriceIncludeChild": true,
        "id": "0dST100000000rgMAA",
        "isComponentRequired": false,
        "isDefaultComponent": false,
        "isQuantityEditable": true,
        "maxQuantity": 3,
        "minQuantity": 1,
        "parentProductId": "01tT1000000F0afIAC",
        "parentSellingModelId": "0jPT10000004CAfMAM",
        "productRelationshipTypeId": "0yoT1000000002WIAQ",
        "quantity": 1,
        "quantityScaleMethod": "Proportional",
        "sequence": 1,
        "isExcluded": false
    },
    "productSellingModelOptions": [
        {
            "id": "0iOT10000004CmMAM",
            "productId": "01tT1000000F0YyIAK",
            "isDefault": false,
            "productSellingModel": {
                "id": "0jPT10000004CAfMAM",
                "name": "OneTimePSM",
                "sellingModelType": "OneTime",
                "status": "Active"
            }
        }
    ],
    "productSpecificationType": {
        "name": "NonCommercialSpecType",
        "productSpecificationRecordType": null
    }
}
],
"description": "PCG001 Description",
"id": "0y7T10000004C9DIAU",
"maxBundleComponents": 5,
"minBundleComponents": 1,
"name": "PCG001",
"parentProductId": "01tT1000000F0afIAC",
"sequence": 1,
"isExcluded": false
}
],
"productSellingModelOptions": [
    {
        "id": "0iOT10000004CmMAM",
        "productId": "01tT1000000F0afIAC",
        "productSellingModel": {
            "id": "0jPT10000004CAfMAM",
            "name": "OneTimePSM",
            "sellingModelType": "OneTime",
            "status": "Active"
        }
    }
]

```



```

    }
  ],
  "productSpecificationType": {
    "name": "NonCommercialSpecType",
    "productSpecificationRecordType": null
  }
},
"status": {
  "code": "200",
  "correlationId": "fd158d80-d73c-4a1f-a009-9225db804d70",
  "errors": [],
  "message": "Successfully fetched Product records."
}
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
additional Fields	Map<String, Additional Fields Input >	Key-value pair of additional standard or custom fields with their values.	Small, 61.0	61.0
attribute Category	Attribute Category []	List of categorized attributes related to the product.	Small, 60.0	60.0
attributes	Attribute Definition []	List of uncategorized attributes related to the product.	Small, 60.0	60.0
availability Date	String	Date when the part is used in the product or is made available for sale.	Small, 60.0	60.0
catalogs	Catalog []	List of the associated catalogs returned with the Product List API (POST) response. The Product By ID API (GET) returns an empty catalog list in the response. Returns the <code>name</code> and <code>id</code> values only.	Small, 61.0	61.0
categories	Category []	List of the associated categories returned with the Product List API (POST) response. The Product By ID API (GET) returns an empty category list in the response. Returns the <code>name</code> and <code>id</code> values only.	Small, 60.0	60.0
childProducts	Product []	Hierarchy of the child products.	Small, 60.0	60.0
configure DuringSale	String	Determines whether to allow or prevent configuration when a bundle is sold.	Small, 60.0	60.0
description	String	Description of the product. If data translation is set up and specified in the org, the translated description is available.	Small, 60.0	60.0

Property Name	Type	Description	Filter Group and Version	Available Version
discontinued Date	String	Date from when the part can't be used in the product or sold.	Small, 60.0	60.0
displayUrl	String	Display image URL of the product.	Small, 60.0	60.0
endOfLifeDate	String	Date after which a product isn't supported, ordered, or maintained.	Small, 60.0	60.0
id	String	ID of the product.	Small, 60.0	60.0
isActive	Boolean	Indicates if the product is active (<code>true</code>) or not (<code>false</code>).	Small, 60.0	60.0
isAssetizable	Boolean	Indicates if the product instance remains a customer asset after it's purchased (<code>true</code>) or not (<code>false</code>).	Small, 60.0	60.0
isSoldOnly WithOther Prods	Boolean	Indicates whether the product can't be sold separately (<code>true</code>) or not (<code>false</code>).	Small, 60.0	60.0
name	String	Name of the product. If data translation is set up and specified in the org, the translated name is available.	Small, 60.0	60.0
nodeType	String	Type of the node, such as a product or bundled product.	Small, 60.0	60.0
product Classification	Product Classification	Details of the product classification that the product is based on.	Small, 60.0	60.0
productCode	String	Universal product code that's used to track the part that's used in the product.	Small, 60.0	60.0
product Component Groups	Product Component Group[]	Logical grouping of the component products in a bundle and the group cardinality for ordering the product components.	Small, 60.0	60.0
product Related Component	Product Related Component	Details of the related components of a product.	Small, 60.0	60.0
product SellingModel Options	Product Selling Model Option[]	Details of the product selling model options.	Small, 60.0	60.0
product Specification Type	Product Specification Type	Details of the product specification type.	Small, 60.0	60.0

Property Name	Type	Description	Filter Group and Version	Available Version
quantityScale Method	String	Method to scale the quantity of the child product in relation to the quantity of the parent.	Small, 60.0	60.0

Product Related Component

Output representation of the product-related component.

JSON example

```
"productRelatedComponent": {
  "childProductId": "01tT1000000F0YyIAK",
  "childSellingModelId": "0jPT10000004CAfMAM",
  "doesBundlePriceIncludeChild": true,
  "id": "0dST100000000rgMAA",
  "isComponentRequired": false,
  "isDefaultComponent": false,
  "isExcluded": false,
  "isQuantityEditable": true,
  "maxQuantity": 3,
  "minQuantity": 1,
  "parentProductId": "01tT1000000F0afIAC",
  "parentSellingModelId": "0jPT10000004CAfMAM",
  "productClassificationId": "11BRO00000000222AA",
  "productRelationshipTypeId": "0yoT1000000002WIAQ",
  "quantity": 1,
  "quantityScaleMethod": "Proportional",
  "quoteVisibility": "Quote Document Only",
  "sequence": 1
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
childProductId	String	Lookup to the child product in the bundle.	Small, 60.0	60.0
childSellingModelId	String	ID of the child product selling model record.	Small, 60.0	60.0
doesBundlePriceIncludeChild	Boolean	Indicates whether the price of the bundle includes the child product (<code>true</code>) or not (<code>false</code>).	Small, 60.0	60.0
id	String	ID of the record.	Small, 60.0	60.0
isComponentRequired	Boolean	Indicates whether the component is required in the bundle (<code>true</code>) or not (<code>false</code>).	Small, 60.0	60.0

Property Name	Type	Description	Filter Group and Version	Available Version
isDefault Component	Boolean	Indicates whether to select the component in the bundle group by default (<code>true</code>) or not (<code>false</code>).	Small, 60.0	60.0
isExcluded	Boolean	Indicates whether the component is excluded in the bundle group (<code>true</code>) or not (<code>false</code>).	Small, 60.0	60.0
isQuantity Editable	Boolean	Indicates whether to allow changes to the quantity of the component in the bundle (<code>true</code>) or not (<code>false</code>).	Small, 60.0	60.0
maxQuantity	Double	Maximum quantity of the product in the opportunity, quote, or order line item.	Small, 60.0	60.0
minQuantity	Double	Minimum quantity of the product in the opportunity, quote, or order line item.	Small, 60.0	60.0
parentProductId	String	Lookup to the parent product.	Small, 60.0	60.0
parentSelling ModelId	String	ID of the product selling model record.	Small, 60.0	60.0
product Classification Id	String	ID of the product classification record.	Small, 60.0	60.0
productInstance Reuse	String	Reserved for future use.	Small, 62.0	62.0
product Relationship TypeId	String	ID of the product relationship type record.	Small, 60.0	60.0
quantity	Double	Quantity of the child products.	Small, 60.0	60.0
quantityScale Method	String	Method to scale the quantity of the child product in relation to the quantity of the parent. Valid values are: <ul style="list-style-type: none"> • <code>Constant</code> • <code>Proportional</code> 	Small, 60.0	60.0
quote Visibility	String	Specifies whether a quote line item must be shown on the transaction line editor or quote document. Valid values are: <ul style="list-style-type: none"> • <code>Always</code> 	Small, 64.0	64.0

Property Name	Type	Description	Filter Group and Version	Available Version
		<ul style="list-style-type: none"> Transaction Line Editor Only—Specifies whether to show a quote line item on quote editor only. Quote Document Only—Specifies whether to show a quote line item on quote proposal only. Never <p>The API returns this property only if the CoreCPQ permission set is available.</p>		
sequence	Integer	Order in which the child products are displayed.	Small, 60.0	60.0

Product Selling Model

Output representation of the definition of the product selling model.

JSON example

```
"productSellingModel":
{
  "id": "0jPT10000004CAfMAM",
  "name": "OneTimePSM",
  "pricingTerm": 1,
  "pricingTermUnit": "Months",
  "sellingModelType": "TermDefined",
  "status": "Active"
}
}]
```

Property Name	Type	Description	Filter Group and Version	Available Version
id	String	ID of the record.	Small, 60.0	60.0
name	String	Name of the record.	Small, 60.0	60.0
pricingTerm	Integer	Duration of the selling model.	Small, 60.0	60.0
pricingTerm Unit	String	Units of the pricing term.	Small, 60.0	60.0
sellingModel Type	String	<p>Different models of selling the product. Valid values are:</p> <ul style="list-style-type: none"> OneTime TermDefined Evergreen 	Small, 60.0	60.0

Property Name	Type	Description	Filter Group and Version	Available Version
status	String	Status of the selling model. For example, whether the selling model is active and can be used in transactions.	Small, 60.0	60.0

Product Selling Model Option

Output representation of the definition of the product selling model option.

! **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.

JSON example

```
"productSellingModelOptions": [
  {
    "id": "0iOT10000004CMrMAM",
    "isDefault": false,
    "productId": "01tT1000000F0YyIAK",
    "productSellingModel": {
      "id": "0jPT10000004CAfMAM",
      "name": "OneTimePSM",
      "pricingTerm": 1,
      "pricingTermUnit": "Months",
      "sellingModelType": "TermDefined",
      "status": "Active"
    }
  }
]
```

Property Name	Type	Description	Filter Group and Version	Available Version
id	String	ID of the record.	Small, 60.0	60.0
isDefault	Boolean	Indicates whether this model option is the default product selling model option (<code>true</code>) or not (<code>false</code>).	Small, 60.0	60.0
productId	String	ID of the product.	Small, 60.0	60.0
productSellingModel	Product Selling Model	Master-detail field to the product selling model.	Small, 60.0	60.0

Product Specification Type

Output representation of the product specification type.

JSON example

```
"productSpecificationType":
{
```

```
"name": "NonCommercialSpecType",
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
name	String	Name of the product specification type.	Small, 60.0	60.0

Products

Output representation of the list of retrieved products.

JSON example

```
{
  "correlationId": "9b6bc520-3c82-4d6c-a458-47590370681a",
  "facets": [
    {
      "attributeType": "ProductStandard",
      "displayName": "Product Type",
      "displayRank": 1,
      "displayType": "MultiSelect",
      "nameOrId": "Type",
      "values": [
        {
          "displayName": "Simple",
          "nameOrId": "Simple",
          "productCount": 9
        }
      ]
    },
    {
      "attributeType": "ProductStandard",
      "displayName": "Active",
      "displayRank": 2,
      "displayType": "MultiSelect",
      "nameOrId": "IsActive",
      "values": [
        {
          "displayName": "true",
          "nameOrId": "true",
          "productCount": 47
        }
      ]
    }
  ],
  "count": 3,
  "products": [
    {
      "attributeCategory": [],
      "attributes": [],
      "categories": [],
      "childProducts": [],
      "description": "Keep your organization connected with seamless collaboration across
```

distributed teams. No matter where employees are located, organizations are seeking stronger employee engagement and customer experiences to enable more productivity and greater business agility. More effective collaboration helps organizations work smarter."

```

      "displayUrl":
"https://dispatch.m.io/wp-content/uploads/2023/01/History-of-Webex.png",
      "id": "01t1Q000008CD2eQAG",
      "isActive": true,
      "isAssetizable": true,
      "isSoldOnlyWithOtherProds": false,
      "name": "SmartBytes Collaboration Suite",
      "nodeType": "bundleProduct",
      "productClassification": {
        "id": "11B1Q000008OMGUA2"
      },
      "productCode": "P0143",
      "productComponentGroups": [],
      "productSellingModelOptions": [
        {
          "id": "0i01Q0000008OkeUAE",
          "productId": "01t1Q000008CD2eQAG",
          "productSellingModel": {
            "id": "0jP1Q000000CaVFUA0",
            "name": "One Time",
            "sellingModelType": "OneTime",
            "status": "Active"
          }
        }
      ],
      "productSpecificationType": {
        "name": "None"
      }
    },
    {
      "attributeCategory": [],
      "attributes": [],
      "categories": [],
      "childProducts": [],
      "configureDuringSale": "Allowed",
      "displayUrl":
"https://www.cisco.com/c/en/us/products/collateral/wireless/sales-brief-30-series-wireless-access-points/datasheet-c8-72143-do-jp-content/edition/datasheet-c8-72143_1.pdf",
      "id": "01t1Q000008CD36QAG",
      "isActive": true,
      "isAssetizable": true,
      "isSoldOnlyWithOtherProds": false,
      "name": "SmartBytes Repeater",
      "nodeType": "simpleProduct",
      "productClassification": {
        "id": "11B1Q000008OMMUA2"
      },
      "productCode": "BS_R001",
      "productComponentGroups": [],
      "productSellingModelOptions": [

```



```

    {
      "id": "0i01Q00000080lsUAE",
      "productId": "01t1Q000008CD36QAG",
      "productSellingModel": {
        "id": "0jP1Q000000CaVFUA0",
        "name": "One Time",
        "sellingModelType": "OneTime",
        "status": "Active"
      }
    }
  ],
  "productSpecificationType": {
    "name": "COM_Offer"
  }
},
{
  "attributeCategory": [],
  "attributes": [],
  "categories": [],
  "childProducts": [],
  "configureDuringSale": "Allowed",
  "description": "A converged data center architecture that integrates computing,
networking and storage resources to increase efficiency and enable centralized management.
UCS products are designed and configured to work together effectively.",
  "displayUrl":
https://www.cisco.com/c/en/us/solutions/cloud-managed/ucsbundle/ucsbundle/ucsbundle.html#/product/ucsbundle/ucsbundle.html,

  "id": "01t1Q000008CD2sQAG",
  "isActive": true,
  "isAssetizable": true,
  "isSoldOnlyWithOtherProds": false,
  "name": "SmartBytes Unified Computing System",
  "nodeType": "bundleProduct",
  "productCode": "P0157",
  "productComponentGroups": [],
  "productSellingModelOptions": [
    {
      "id": "0i01Q00000080kzUAE",
      "productId": "01t1Q000008CD2sQAG",
      "productSellingModel": {
        "id": "0jP1Q000000CaVFUA0",
        "name": "One Time",
        "sellingModelType": "OneTime",
        "status": "Active"
      }
    }
  ],
  {
    "id": "0i01Q00000080lwUUAU",
    "productId": "01t1Q000008CD2sQAG",
    "productSellingModel": {
      "id": "0jP1Q000000CaVHUA0",
      "name": "Evergreen",
      "pricingTerm": 1,
      "pricingTermUnit": "Months",

```

```

        "sellingModelType": "Evergreen",
        "status": "Active"
      }
    ],
    "productSpecificationType": {
      "name": "None"
    }
  ],
  "status": {
    "code": "200",
    "errors": [],
    "message": "Successfully fetched the product records."
  }
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
correlationId	String	Unique token to track and associate related events or transactions across different components of the application. If unspecified, a Universally Unique Identifier (UUID) is generated.	Small, 60.0	60.0
count	Integer	Total count of the products matching the request query.	Small, 60.0	60.0
facets	Search Facet	Details of the faceted search. This property is applicable if the Use Indexed Data For Product Listing and Search toggle from the Product Discovery Settings page from Setup is enabled.	Small, 63.0	63.0
products	Product[]	List of products matching the request query.	Small, 60.0	60.0
status	Status	Status of the request.	Small, 60.0	60.0

Related Object Records

Output representation of the related records for a specified record ID and related object API name.

JSON example

```

"relatedObjectRecords": [
  {
    "count": 2,
    "records": [
      {
        "SegmentType": "Yearly",
        "DurationType": "Months",
        "TrialDuration": null,
        "ProductSellingModelId": "0jPxx000000001dEAA",

```

```

        "ProductId": "01txx0000006i44AAA",
        "Id": "1FTxx0000004CDtGAM",
        "Name": "PPRS-000000005"
    },
    {
        "SegmentType": "FreeTrial",
        "DurationType": "Days",
        "TrialDuration": null,
        "ProductSellingModelId": "0jPxx00000001dEAA",
        "ProductId": "01txx0000006i44AAA",
        "Id": "1FTxx0000004CFUGA2",
        "Name": "PPRS-000000006"
    }
],
"relatedObjectAPIName": "ProductRampSegment"
},
{
    "count": 2,
    "records": [
        {
            "UsageMetricId": "1BRxx0000004CAeGAM",
            "UsageMetricName": "Test Usage Metric 2",
            "UsageDefinitionProductId": null,
            "Label": "PUG-103",
            "Quantity": 100,
            "Id": "1BXxx0000004CCGGA2"
        },
        {
            "UsageMetricId": "1BRxx0000004CCGGA2",
            "UsageMetricName": "Test Usage Metric 3",
            "UsageDefinitionProductId": "01txx0000006i2eAAA",
            "Label": "PUG-105",
            "Quantity": 500,
            "Id": "1BXxx0000004CFUGA2"
        }
    ],
    "relatedObjectAPIName": "ProductUsageGrant"
}
]

```

Property Name	Type	Description	Filter Group and Version	Available Version
count	Integer	Total count of the related records that are returned.	Small, 62.0	62.0
records	Map<String, Object>	List of related object records.	Small, 62.0	62.0
relatedObjectAPIName	String	API name of the related object to return the records for.	Small, 62.0	62.0

Related Records

Output representation of the list of relatedObject records for a specified record ID.

JSON example

```

"relatedRecords": [
  {
    "recordId": "01txx0000006i44AAA",
    "relatedObjectRecords": [
      {
        "count": 2,
        "records": [
          {
            "SegmentType": "Yearly",
            "DurationType": "Months",
            "TrialDuration": null,
            "ProductSellingModelId": "0jPxx000000001dEAA",
            "ProductId": "01txx0000006i44AAA",
            "Id": "1FTxx0000004CDtGAM",
            "Name": "PPRS-000000005"
          },
          {
            "SegmentType": "FreeTrial",
            "DurationType": "Days",
            "TrialDuration": null,
            "ProductSellingModelId": "0jPxx000000001dEAA",
            "ProductId": "01txx0000006i44AAA",
            "Id": "1FTxx0000004CFUGA2",
            "Name": "PPRS-000000006"
          }
        ],
        "relatedObjectAPIName": "ProductRampSegment"
      },
      {
        "count": 2,
        "records": [
          {
            "UsageMetricId": "1BRxx0000004CAeGAM",
            "UsageMetricName": "Test Usage Metric 2",
            "UsageDefinitionProductId": null,
            "Label": "PUG-103",
            "Quantity": 100,
            "Id": "1BXxx0000004CCGA2"
          },
          {
            "UsageMetricId": "1BRxx0000004CCGA2",
            "UsageMetricName": "Test Usage Metric 3",
            "UsageDefinitionProductId": "01txx0000006i2eAAA",
            "Label": "PUG-105",
            "Quantity": 500,
            "Id": "1BXxx0000004CFUGA2"
          }
        ],
        "relatedObjectAPIName": "ProductUsageGrant"
      }
    ]
  }
]

```

```

    ]
  },
  {
    "recordId": "01txx0000006i5gAAA",
    "relatedObjectRecords": [
      {
        "count": 4,
        "records": [
          {
            "SegmentType": "Yearly",
            "DurationType": "Months",
            "TrialDuration": null,
            "ProductSellingModelId": "0jPxx0000000001EAA",
            "ProductId": "01txx0000006i5gAAA",
            "Id": "1FTxx0000004C92GAE",
            "Name": "PPRS-000000001"
          },
          {
            "SegmentType": "Custom",
            "DurationType": "Days",
            "TrialDuration": null,
            "ProductSellingModelId": "0jPxx0000000001EAA",
            "ProductId": "01txx0000006i5gAAA",
            "Id": "1FTxx0000004CAeGAM",
            "Name": "PPRS-000000002"
          },
          {
            "SegmentType": "FreeTrial",
            "DurationType": "Months",
            "TrialDuration": 6,
            "ProductSellingModelId": "0jPxx0000000001EAA",
            "ProductId": "01txx0000006i5gAAA",
            "Id": "1FTxx0000004CCGGA2",
            "Name": "PPRS-000000003"
          },
          {
            "SegmentType": "Custom",
            "DurationType": null,
            "TrialDuration": null,
            "ProductSellingModelId": "0jPxx0000000001EAA",
            "ProductId": "01txx0000006i5gAAA",
            "Id": "1FTxx0000004CDsGAM",
            "Name": "PPRS-000000004"
          }
        ],
        "relatedObjectAPIName": "ProductRampSegment"
      },
      {
        "count": 0,
        "records": [],
        "relatedObjectAPIName": "ProductUsageGrant"
      }
    ]
  }
]

```

```
}
]
```

Property Name	Type	Description	Filter Group and Version	Available Version
recordId	String	ID of the record.	Small, 62.0	62.0
relatedObjectRecords	Related Object Records[]	List of related object records.	Small, 62.0	62.0

Related Records List

Output representation of the list of related records.

JSON example

```
{
  "correlationId": "f4d6b42a-d9b7-49c9-8fa8-1c7bb6fe99aa",
  "relatedRecords": [
    {
      "recordId": "01txx0000006i44AAA",
      "relatedObjectRecords": [
        {
          "count": 2,
          "records": [
            {
              "SegmentType": "Yearly",
              "DurationType": "Months",
              "TrialDuration": null,
              "ProductSellingModelId": "0jPxx000000001dEAA",
              "ProductId": "01txx0000006i44AAA",
              "Id": "1FTxx0000004CDtGAM",
              "Name": "PPRS-000000005"
            },
            {
              "SegmentType": "FreeTrial",
              "DurationType": "Days",
              "TrialDuration": null,
              "ProductSellingModelId": "0jPxx000000001dEAA",
              "ProductId": "01txx0000006i44AAA",
              "Id": "1FTxx0000004CFUGA2",
              "Name": "PPRS-000000006"
            }
          ]
        }
      ],
      "relatedObjectAPIName": "ProductRampSegment"
    },
    {
      "count": 2,
      "records": [
        {
          "UsageMetricId": "1BRxx0000004CAeGAM",
          "UsageMetricName": "Test Usage Metric 2",
          "UsageDefinitionProductId": null,

```

```

        "Label": "PUG-103",
        "Quantity": 100,
        "Id": "1BXxx0000004CCGGA2"
    },
    {
        "UsageMetricId": "1BRxx0000004CCGGA2",
        "UsageMetricName": "Test Usage Metric 3",
        "UsageDefinitionProductId": "01txx0000006i2eAAA",
        "Label": "PUG-105",
        "Quantity": 500,
        "Id": "1BXxx0000004CFUGA2"
    }
],
"relatedObjectAPIName": "ProductUsageGrant"
}
]
},
{
    "recordId": "01txx0000006i5gAAA",
    "relatedObjectRecords": [
        {
            "count": 4,
            "records": [
                {
                    "SegmentType": "Yearly",
                    "DurationType": "Months",
                    "TrialDuration": null,
                    "ProductSellingModelId": "0jPxx0000000001EAA",
                    "ProductId": "01txx0000006i5gAAA",
                    "Id": "1FTxx0000004C92GAE",
                    "Name": "PPRS-000000001"
                },
                {
                    "SegmentType": "Custom",
                    "DurationType": "Days",
                    "TrialDuration": null,
                    "ProductSellingModelId": "0jPxx0000000001EAA",
                    "ProductId": "01txx0000006i5gAAA",
                    "Id": "1FTxx0000004CAeGAM",
                    "Name": "PPRS-000000002"
                },
                {
                    "SegmentType": "FreeTrial",
                    "DurationType": "Months",
                    "TrialDuration": 6,
                    "ProductSellingModelId": "0jPxx0000000001EAA",
                    "ProductId": "01txx0000006i5gAAA",
                    "Id": "1FTxx0000004CCGGA2",
                    "Name": "PPRS-000000003"
                },
                {
                    "SegmentType": "Custom",
                    "DurationType": null,
                    "TrialDuration": null,
                }
            ]
        }
    ]
}

```

```

        "ProductSellingModelId": "0jPxx000000001EAA",
        "ProductId": "01txx0000006i5gAAA",
        "Id": "1FTxx0000004CDsGAM",
        "Name": "PPRS-000000004"
    }
  ],
  "relatedObjectAPIName": "ProductRampSegment"
},
{
  "count": 0,
  "records": [],
  "relatedObjectAPIName": "ProductUsageGrant"
}
]
}
],
"status": {
  "code": "200",
  "errors": [
  ],
  "message": ""
}
}
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
correlationId	String	Unique token to track and associate related events or transactions across different components of the application. If unspecified, a Universally Unique Identifier (UUID) is generated.	Small, 62.0	62.0
related Records	Related Records[]	List of related records.	Small, 62.0	62.0
status	Status[]	Status of the API request.	Small, 62.0	62.0

Search Facet

Output representation of the details of the faceted search.

JSON example

```

"facets": [
  {
    "attributeType": "ProductStandard",
    "displayName": "Product Type",
    "displayRank": 1,
    "displayType": "MultiSelect",
    "nameOrId": "Type",
    "values": [
      {

```



```

        "displayName": "Simple",
        "nameOrId": "Simple",
        "productCount": 9
      }
    ]
  },
  {
    "attributeType": "ProductStandard",
    "displayName": "Active",
    "displayRank": 2,
    "displayType": "MultiSelect",
    "nameOrId": "IsActive",
    "values": [
      {
        "displayName": "true",
        "nameOrId": "true",
        "productCount": 47
      }
    ]
  }
]

```

Property Name	Type	Description	Filter Group and Version	Available Version
attributeType	String	Search attribute type of the facet.	Small, 63.0	63.0
displayName	String	Display name of the facet.	Small, 63.0	63.0
displayRank	Integer	Display rank of the facet.	Small, 63.0	63.0
displayType	String	Display type of the face.	Small, 63.0	63.0
nameOrId	String	Facet name or ID. Reserved for internal use.	Small, 63.0	63.0
values	Facet Value[]	Values of the facet found in the search result. Sorted by display name in alphabetical order.	Small, 63.0	63.0

Setting

Output representation of the setting that's used in indexing.

JSON example

```

"setting": {
  "defaultLanguage": "en_US",
  "id": "1JySG000000GUb0AM",
  "supportedLanguages": ["en_US", "ja", "es", "nl_NL"]
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
default Language	String	Default language for the API.	Small, 63.0	63.0
id	String	ID of the setting.	Small, 63.0	63.0
supported Languages	String[]	List of supported language locales for indexing.	Small, 63.0	63.0

Setting Metadata

Output representation of the metadata associated with a setting.

JSON example

```
"metadata": {
  "activeLanguages": [
    "en_US"
  ]
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
active Languages	String[]	List of active languages in an org.	Small, 63.0	63.0

Snapshot

Output representation of the list of active snapshots.

JSON example

```
"snapshots": [
  {
    "activationDate": "2024-11-06T06:58:02.000Z",
    "activationStatus": "ACTIVE",
    "activationType": "IMMEDIATE",
    "id": "1Avxx0000004C92CAE",
    "snapshotIndexes": [
      {
        "createdDate": "2024-11-06T06:56:49.000Z",
        "id": "1D6xx0000004C92CAE",
        "indexBuildType": "FULL",
        "indexInfos": [
          {
            "buildType": "FULL",
            "id": "0axxx0000000T3AAI",
            "isIncrementable": true,
            "usageType": "LIVE"
          }
        ]
      }
    ]
  }
]
```

```

],
  "indexLogs": [
    {
      "catalogSnapshotTime": "2024-11-06T16:14:30.000Z",
      "completionTime": "2024-11-06T16:16:02.000Z",
      "createdById": "005xx000001X7x7AAC",
      "indexBuildStatus": "COMPLETED",
      "indexBuildType": "FULL",
      "indexId": "0axxx0000000T3AAI",
      "numberOfChanges": 7
    },
    {
      "catalogSnapshotTime": "2024-11-06T15:03:32.000Z",
      "completionTime": "2024-11-06T15:05:02.000Z",
      "createdById": "005xx000001X7x7AAC",
      "indexBuildStatus": "COMPLETED_WITH_ERRORS",
      "indexBuildType": "INCREMENTAL",
      "indexId": "0axxx0000000RRAAY",
      "message": "Warning: Product errors found.",
      "numberOfChanges": 3
    },
    {
      "catalogSnapshotTime": "2024-11-06T12:35:34.000Z",
      "completionTime": "2024-11-06T12:35:34.000Z",
      "createdById": "005xx000001X7x7AAC",
      "indexBuildStatus": "COMPLETED",
      "indexBuildType": "INCREMENTAL",
      "indexId": "0axxx0000000RRAAY",
      "message": "There are no changes for the partial update.",
      "numberOfChanges": 0
    },
    {
      "catalogSnapshotTime": "2024-11-06T12:07:32.000Z",
      "completionTime": "2024-11-06T12:09:02.000Z",
      "createdById": "005xx000001X7x7AAC",
      "indexBuildStatus": "COMPLETED_WITH_ERRORS",
      "indexBuildType": "FULL",
      "message": "Warning: Product errors found.",
      "numberOfChanges": 1
    }
  ],
  "indexType": "PRODUCT",
  "lastBuildStatus": "IN_PROGRESS",
  "venueId": "1D6xx0000004C92CAE"
}
]
]

```

Property Name	Type	Description	Filter Group and Version	Available Version
activation Date	String	Activation date of the snapshot.	Small, 62.0	62.0

Property Name	Type	Description	Filter Group and Version	Available Version
activation Status	String	Activation status of the snapshot. Valid values are: <ul style="list-style-type: none"> NONE ACTIVE—Snapshot is in active status. EXPIRED—Snapshot is in expired status. 	Small, 62.0	62.0
activation Type	String	Activation type of the snapshot. Valid values are: <ul style="list-style-type: none"> IMMEDIATE—Snapshot is activated immediately after a successful build. 	Small, 62.0	62.0
id	String	ID of the snapshot.	Small, 61.0	61.0
snapshot Indexes	Snapshot Index[]	List of indexes created in the snapshot.	Small, 62.0	62.0

Snapshot Collection

Output representation of the retrieved snapshot collection.

JSON example

```
{
  "errors": [],
  "snapshots": [
    {
      "activationDate": "2024-11-06T06:58:02.000Z",
      "activationStatus": "ACTIVE",
      "activationType": "IMMEDIATE",
      "id": "1Avxx0000004C92CAE",
      "snapshotIndexes": [
        {
          "createdDate": "2024-11-06T06:56:49.000Z",
          "id": "1D6xx0000004C92CAE",
          "indexBuildType": "FULL",
          "indexInfos": [
            {
              "buildType": "FULL",
              "id": "0axxx00000000T3AAI",
              "isIncrementable": true,
              "usageType": "LIVE"
            }
          ]
        }
      ],
      "indexLogs": [
        {
          "catalogSnapshotTime": "2024-11-06T16:14:30.000Z",
          "completionTime": "2024-11-06T16:16:02.000Z",
          "createdById": "005xx000001X7x7AAC",

```

```

        "indexBuildStatus": "COMPLETED",
        "indexBuildType": "FULL",
        "indexId": "0axxx0000000T3AAI",
        "numberOfChanges": 7
    },
    {
        "catalogSnapshotTime": "2024-11-06T15:03:32.000Z",
        "completionTime": "2024-11-06T15:05:02.000Z",
        "createdById": "005xx000001X7x7AAC",
        "indexBuildStatus": "COMPLETED_WITH_ERRORS",
        "indexBuildType": "INCREMENTAL",
        "indexId": "0axxx0000000RRAAY",
        "message": "Warning: Product errors found.",
        "numberOfChanges": 3
    },
    {
        "catalogSnapshotTime": "2024-11-06T12:35:34.000Z",
        "completionTime": "2024-11-06T12:35:34.000Z",
        "createdById": "005xx000001X7x7AAC",
        "indexBuildStatus": "COMPLETED",
        "indexBuildType": "INCREMENTAL",
        "indexId": "0axxx0000000RRAAY",
        "message": "There are no changes for the partial update.",
        "numberOfChanges": 0
    },
    {
        "catalogSnapshotTime": "2024-11-06T12:07:32.000Z",
        "completionTime": "2024-11-06T12:09:02.000Z",
        "createdById": "005xx000001X7x7AAC",
        "indexBuildStatus": "COMPLETED_WITH_ERRORS",
        "indexBuildType": "FULL",
        "message": "Warning: Product errors found.",
        "numberOfChanges": 1
    }
],
"indexType": "PRODUCT",
"lastBuildStatus": "IN_PROGRESS",
"venueId": "1D6xx0000004C92CAE"
}
]
}
],
"statusCode": "200"
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
errors	Error Output[]	List of errors, if any.	Small, 62.0	62.0
snapshots	Snapshot[]	List of active snapshots.	Small, 62.0	62.0
statusCode	String	Code indicating the status of the request.	Small, 62.0	62.0

Snapshot Deployment

Output representation of the snapshot deployment.

JSON example

This example shows a sample response to the request to build a new snapshot with immediate activation.

```
{
  "errors": [],
  "snapshot": {
    "activationStatus": "NONE",
    "activationType": "IMMEDIATE",
    "id": "1Avxx0000004CFU",
    "snapshotIndexes": [
      {
        "createdDate": "2024-07-24T21:10:48.000Z",
        "id": "1D6xx0000004CFU",
        "indexBuildType": "FULL",
        "indexType": "PRODUCT",
        "lastBuildStatus": "IN_PROGRESS"
      }
    ]
  },
  "statusCode": "200"
}
```

This example shows a sample response of the request to rebuild a snapshot in the `active` status.

```
{
  "errors": [],
  "snapshot": {
    "activationStatus": "NONE",
    "activationType": "IMMEDIATE",
    "id": "1Avxx0000004CH6",
    "snapshotIndexes": [
      {
        "createdDate": "2024-07-24T21:13:05.000Z",
        "id": "1D6xx0000004CH6",
        "indexBuildType": "FULL",
        "indexType": "PRODUCT",
        "lastBuildStatus": "IN_PROGRESS"
      }
    ]
  },
  "statusCode": "200"
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
errors	Error Output[]	List of errors, if any.	Small, 62.0	62.0
snapshot	Snapshot[]	Run-time catalog snapshot associated with the created index.	Small, 62.0	62.0
statusCode	String	Code indicating the status of the request.	Small, 62.0	62.0

Snapshot Index

Output representation of the snapshot index of a run-time catalog.

JSON example

```
"snapshotIndexes": [
  {
    "createdDate": "2024-11-06T06:56:49.000Z",
    "id": "1D6xx0000004C92CAE",
    "indexBuildType": "FULL",
    "indexInfos": [
      {
        "buildType": "FULL",
        "id": "0axxx0000000T3AAI",
        "isIncrementable": true,
        "usageType": "LIVE"
      }
    ],
    "indexLogs": [
      {
        "catalogSnapshotTime": "2024-11-06T16:14:30.000Z",
        "completionTime": "2024-11-06T16:16:02.000Z",
        "createdById": "005xx000001X7x7AAC",
        "indexBuildStatus": "COMPLETED",
        "indexBuildType": "FULL",
        "indexId": "0axxx0000000T3AAI",
        "numberOfChanges": 7
      },
      {
        "catalogSnapshotTime": "2024-11-06T15:03:32.000Z",
        "completionTime": "2024-11-06T15:05:02.000Z",
        "createdById": "005xx000001X7x7AAC",
        "indexBuildStatus": "COMPLETED_WITH_ERRORS",
        "indexBuildType": "INCREMENTAL",
        "indexId": "0axxx0000000RRAAY",
        "message": "Warning: Product errors found.",
        "numberOfChanges": 3
      },
      {
        "catalogSnapshotTime": "2024-11-06T12:35:34.000Z",
        "completionTime": "2024-11-06T12:35:34.000Z",
        "createdById": "005xx000001X7x7AAC",
        "indexBuildStatus": "COMPLETED",
        "indexBuildType": "INCREMENTAL",
        "indexId": "0axxx0000000RRAAY",
        "message": "There are no changes for the partial update.",
        "numberOfChanges": 0
      },
      {
        "catalogSnapshotTime": "2024-11-06T12:07:32.000Z",
        "completionTime": "2024-11-06T12:09:02.000Z",
        "createdById": "005xx000001X7x7AAC",
        "indexBuildStatus": "COMPLETED_WITH_ERRORS",
        "indexBuildType": "FULL",
        "message": "Warning: Product errors found.",
      }
    ]
  }
]
```

```

        "numberOfChanges": 1
      }
    ],
    "indexType": "PRODUCT",
    "lastBuildStatus": "IN_PROGRESS",
    "venueId": "1D6xx0000004C92CAE"
  }
]

```

Property Name	Type	Description	Filter Group and Version	Available Version
completedDate	String	Completed date of the snapshot index.	Small, 62.0	62.0
createdDate	String	Created date of the snapshot index.	Small, 62.0	62.0
id	String	ID of the snapshot index.	Small, 62.0	62.0
indexBuild Type	String	Build type of the snapshot index. Valid value is: <ul style="list-style-type: none"> FULL—Specifies a full index build. INCREMENTAL—Specifies an incremental index build. Available in API version 63.0 and later. 	Small, 62.0	62.0
indexInfos	Index Info	Index information records associated with the snapshot index.	Small, 63.0	63.0
indexLogs	Index Logs[]	Index logs associated with the snapshot index.	Small, 63.0	63.0
indexType	String	Index type of the snapshot index. Valid value is: <ul style="list-style-type: none"> PRODUCT—Snapshot index is of product type. 	Small, 62.0	62.0
lastBuild Status	String	Last build status of the snapshot index. Valid values are: <ul style="list-style-type: none"> IN_PROGRESS—Snapshot index build is in progress. FAILED—Snapshot index build failed. COMPLETED—Snapshot index build completed successfully. 	Small, 62.0	62.0
numberOfRecords	Integer	Number of indexed records.	Small, 62.0	62.0
venueId	String	Venue ID of the snapshot index.	Small, 63.0	63.0

Snapshot Index Error

Output representation of the error details related to a snapshot index.

JSON example

```
{
  "errors": [],
  "indexErrorDetails": {
    "errorFileId": "069xx0000004C92AAE",
    "indexCreatedDate": "2024-10-03T05:24:18.000Z",
    "indexErrorsCount": 1,
    "indexLastUpdatedDate": "2024-10-03T05:27:00.000Z",
    "itemLevelErrorsCount": 1
  },
  "statusCode": "200"
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
errors	Error Output[]	List of errors encountered during the processing of the API request.	Small, 63.0	63.0
indexErrorDetails	Index Error[]	Count and details of errors that occurred during indexing.	Small, 63.0	63.0
statusCode	String	Code that indicates the status of the API request.	Small, 63.0	63.0

Snapshot Index Info

Output representation of the details of a snapshot index.

JSON example

```
"indexInfos": [
  {
    "buildType": "FULL",
    "id": "0axxx00000000T3AAI",
    "isIncrementable": true,
    "usageType": "LIVE"
  }
]
```

Property Name	Type	Description	Filter Group and Version	Available Version
buildType	String	Build type of the index. Valid values are: <ul style="list-style-type: none"> FULL—Specifies a full index build. INCREMENTAL—Specifies an incremental index build. Available in API version 63.0 and later. 	Small, 63.0	63.0

Property Name	Type	Description	Filter Group and Version	Available Version
id	String	ID of the index information record.	Small, 63.0	63.0
isIncrementable	Boolean	Indicates whether a partial build is enabled (<code>true</code>) or disabled (<code>false</code>).	Small, 63.0	63.0
usageType	String	Usage type of the index. Valid values are: <ul style="list-style-type: none"> LIVE—Index usage type is live. OUT_OF_USE—Index usage type is out of use. 	Small, 63.0	63.0

Snapshot Index Log

Output representation of a snapshot index log.

JSON example

```
"indexLogs": [
  {
    "catalogSnapshotTime": "2024-11-06T16:14:30.000Z",
    "completionTime": "2024-11-06T16:16:02.000Z",
    "createdById": "005xx000001X7x7AAC",
    "indexBuildStatus": "COMPLETED",
    "indexBuildType": "FULL",
    "indexId": "0axxx0000000T3AAI",
    "numberOfChanges": 7
  },
  {
    "catalogSnapshotTime": "2024-11-06T15:03:32.000Z",
    "completionTime": "2024-11-06T15:05:02.000Z",
    "createdById": "005xx000001X7x7AAC",
    "indexBuildStatus": "COMPLETED_WITH_ERRORS",
    "indexBuildType": "INCREMENTAL",
    "indexId": "0axxx0000000RRAAY",
    "message": "Warning: Product errors found.",
    "numberOfChanges": 3
  },
  {
    "catalogSnapshotTime": "2024-11-06T12:35:34.000Z",
    "completionTime": "2024-11-06T12:35:34.000Z",
    "createdById": "005xx000001X7x7AAC",
    "indexBuildStatus": "COMPLETED",
    "indexBuildType": "INCREMENTAL",
    "indexId": "0axxx0000000RRAAY",
    "message": "There are no changes for the partial update.",
    "numberOfChanges": 0
  },
  {
    "catalogSnapshotTime": "2024-11-06T12:07:32.000Z",
    "completionTime": "2024-11-06T12:09:02.000Z",
    "createdById": "005xx000001X7x7AAC",
```

```

    "indexBuildStatus": "COMPLETED_WITH_ERRORS",
    "indexBuildType": "FULL",
    "message": "Warning: Product errors found.",
    "numberOfChanges": 1
  }
]

```

Property Name	Type	Description	Filter Group and Version	Available Version
catalog SnapshotTime	String	Catalog snapshot time of the index.	Small, 63.0	63.0
completion Time	String	Completion time of the index.	Small, 63.0	63.0
createdById	String	ID of the user that initiated the index build.	Small, 63.0	63.0
indexBuild Status	String	Status of the index build.	Small, 63.0	63.0
indexBuild Type	String	Type of the index build. Valid values are: <ul style="list-style-type: none"> FULL—Specifies a full index build. INCREMENTAL—Specifies an incremental index build. Available in API version 63.0 and later. 	Small, 63.0	63.0
indexId	String	ID of the index.	Small, 63.0	63.0
message	String	Message for the index status.	Small, 63.0	63.0
numberOf Changes	Integer	Number of new or changed products included in the index.	Small, 63.0	63.0

Status

Output representation of the status of the request.

JSON example

```

"status": {
  "code": "200",
  "errors": [],
  "message": "Successfully fetched the catalog records."
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
code	String	Code of the error message.	Small, 60.0	60.0
errors	Error[]	Details of the error.	Small, 60.0	60.0

Property Name	Type	Description	Filter Group and Version	Available Version
message	String	Error message.	Small, 60.0	60.0

Unit of Measure Error

Output representation of the details of errors encountered during the processing of the Unit of Measure API request.

JSON example

```
"errorCodeToErrorMap": {
  "UNIT_OF_MEASURE_INFO_INVALID_UOM_IDS": {
    "errorCode": "UOM_INFO_API_003",
    "messageDetail": "Invalid uomId is passed. Please specify a valid uomId.",
    "messageTitle": "Invalid uomId is passed.",
    "recordIds": [
      "sample"
    ],
    "source": "Unit_Of_Measure_Info_Api"
  }
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
errorCode	String	Localized error code.	Small, 63.0	63.0
messageDetail	String	Localized details of the error message.	Small, 63.0	63.0
messageTitle	String	Localized title of the error message.	Small, 63.0	63.0
recordIds	String[]	List of erroneous record IDs.	Small, 63.0	63.0
source	String	Localized source of the error.	Small, 63.0	63.0

Unit of Measure Info

Output representation of the details of a unit of measure record.

JSON example

```
"uomIdToUnitOfMeasureInfo": {
  "0hEU200000003M5MAI": {
    "id": "0hEU200000003M5MAI",
    "name": "Pounds",
    "roundingMethod": "Nearest",
    "scale": 1,
    "unitCode": "Pounds"
  },
  "0hEU200000003KTMAI": {
    "id": "0hEU200000003KTMAI",
    "name": "Grams",
    "roundingMethod": "Down",
    "scale": 5,
  }
}
```

```

    "unitCode": "Grams"
  }
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
id	String	ID of the unit of measure record.	Small, 63.0	63.0
name	String	Name of the unit of measure record.	Small, 63.0	63.0
roundingMethod	String	Data rounding method of the unit of measure record.	Small, 63.0	63.0
scale	Integer	Scale of the unit of measure record.	Small, 63.0	63.0
unitCode	String	Code of the unit of measure record.	Small, 63.0	63.0

Unit of Measure Status

Output representation of the status of the Unit of Measure API request.

JSON example

```

"status": {
  "errors": [],
  "statusCode": "200",
  "message": " Successfully fetched UnitOfMeasure Info. "
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
errors	Unit Of Measure Error[]	Errors encountered during the processing of the API request.	Small, 63.0	63.0
statusCode	String	HTTP status code of the API request.	Small, 63.0	63.0
message	String	Localized response message.	Small, 63.0	63.0

Product Catalog Management Metadata API Types

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

[ProductCatalogManagementSettings](#)

Represents the settings for Product Catalog Management.

[ProductSpecificationType](#)

Represents the specification types in your org that define products with unique terminology specific to the industry.

[ProductSpecificationRecType](#)

Represents the association of a product specification type with record types defined on the Product object. The product specification record type also determines if the product specification is sold commercially or not.

SEE ALSO:

[Metadata API Developer Guide: Understanding Metadata API](#)

ProductCatalogManagementSettings

Represents the settings for Product Catalog Management.

Parent Type and Manifest Access

This type extends the [Metadata](#) metadata type and inherits its `fullName` field.

In the package manifest, all the settings metadata types for the org are accessed using the “Settings” name. See [Settings](#) for more details.

File Suffix and Directory Location

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

Version

`ProductCatalogManagementSettings` components are available in API version 64.0 and later.

Special Access Rules

These settings are available when Product Catalog Management is enabled.

Fields

Field Name	Description
<code>productDeepCloneContextDefOrgValue</code>	<p>Field Type string</p> <p>Description Name of the context definition that you want to use to deep clone the product.</p>
<code>productDeepCloneExpressionSetOrgValue</code>	<p>Field Type string</p> <p>Description Expression set that contains the rules that you want to apply to deep clone the product.</p>

Declarative Metadata Sample Definition

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

```
<ProductCatalogManagementSettings xmlns="http://soap.sforce.com/2006/04/metadata">
  <productDeepCloneContextDefOrgValue>ProductDeepCloneContextDefinition</productDeepCloneContextDefOrgValue>
  <productDeepCloneExpressionSetOrgValue>ProductDeepCloneExpressionSet</productDeepCloneExpressionSetOrgValue>
</ProductCatalogManagementSettings>
```

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>ProductCatalogManagement</members>
    <name>Settings</name>
  </types>
  <version>65.0</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](#).

ProductSpecificationType

Represents the specification types in your org that define products with unique terminology specific to the industry.

 **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

`ProductSpecificationType` components have the suffix `.productSpecificationType` and are stored in the `productSpecificationTypes` folder.

Version

`ProductSpecificationType` components are available in API version 60.0 and later.

Special Access Rules

Ensure Product Catalog Management is enabled to access this metadata type.

Fields

Field Name	Description
description	<p>Field Type string</p> <p>Description Required. Description of the product specification type.</p>
masterLabel	<p>Field Type string</p> <p>Description Required. A user-friendly name for the product specification record type, which is defined when the metadata component is created.</p>

Declarative Metadata Sample Definition

The following is an example of a ProductSpecificationType component.

```
<ProductSpecificationType xmlns="http://soap.sforce.com/2006/04/metadata">
  <masterLabel>sample</masterLabel>
  <description>Sample Description</description>
</ProductSpecificationType>
```

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

```
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
  <types>
    <members>*</members>
    <name>ProductSpecificationType</name>
  </types>
  <version>65.0</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](#).

ProductSpecificationRecType

Represents the association of a product specification type with record types defined on the Product object. The product specification record type also determines if the product specification is sold commercially or not.

! **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

`ProductSpecificationRecType` components have the suffix `.productSpecificationRecType` and are stored in the `productSpecificationRecTypes` folder.

Version

`ProductSpecificationRecType` components are available in API version 60.0 and later.

Special Access Rules

Ensure Product Catalog Management is enabled to access this metadata type.

Fields

Field Name	Description
<code>isCommercial</code>	<p>Field Type boolean</p> <p>Description Required. Indicates whether the product is sold commercially (<code>true</code>) or not (<code>false</code>). The default value is <code>true</code>.</p>
<code>masterLabel</code>	<p>Field Type string</p> <p>Description Required. A user-friendly name for the product specification record type, which is defined when the metadata component is created.</p>
<code>productSpecificationType</code>	<p>Field Type string</p> <p>Description Required. Product specification type that's associated with the record type. This field is unique within your organization.</p>

Field Name	Description
recordType	<p>Field Type string</p> <p>Description Required. Custom record type of Product2 object.</p>

Declarative Metadata Sample Definition

The following is an example of a ProductSpecificationRecType component.

```
<ProductSpecificationRecType xmlns="http://soap.sforce.com/2006/04/metadata">
  <masterLabel>sample</masterLabel>
  <recordType>Product2.Offer</recordType>
  <productSpecificationType>Placeholder</productSpecificationType>
  <isCommercial>true</isCommercial>
</ProductSpecificationRecType>
```

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

```
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
  <types>
    <members>*</members>
    <name>ProductSpecificationRecType</name>
  </types>
  <types>
    <members>*</members>
    <name>ProductSpecificationType</name>
  </types>
  <types>
    <members>Product2.Offer</members>
    <name>RecordType</name>
  </types>
  <version>65.0</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](#).

Product Catalog Management 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.

[ProductSpecificationType](#)

Represents the specification types in your org that define products with unique terminology specific to the industry. This object is available in API version 60.0 and later.

[ProductSpecificationRecType](#)

Represents the association of a product specification type with record types defined on the Product object. The product specification record type also determines if the product specification is sold commercially or not. This object is available in API version 60.0 and later.

SEE ALSO:

[Tooling API Developer Guide: Introducing Tooling API](#)

ProductSpecificationType

Represents the specification types in your org that define products with unique terminology specific to the industry. This object is available in API version 60.0 and later.



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

Supported SOAP API Calls

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

Supported REST API Methods

DELETE, GET, HEAD, PATCH, POST, Query

Special Access Rules

Ensure Product Catalog Management is enabled to access this object.

Fields


Field	Details
Description	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description Description of the product specification type.</p>
DeveloperName	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description</p> <p>The unique name of the object in the API. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization. Label is Record Type Name.</p>
Language	<p>Type</p> <p>picklist</p> <p>Properties</p> <p>Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description</p> <p>Language of the product specification type instance.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • da—Danish • de—German • en_US—English • es—Spanish • es_MX—Spanish (Mexico) • fi—Finnish • fr—French • it—Italian • ja—Japanese • ko—Korean • nl_NL—Dutch • no—Norwegian • pt_BR—Portuguese (Brazil) • ru—Russian • sv—Swedish • th—Thai • zh_CN—Chinese (Simplified) • zh_TW—Chinese (Traditional)
ManageableState	<p>Type</p> <p>picklist</p> <p>Properties</p> <p>Filter, Group, Nillable, Restricted picklist, Sort</p>

Field	Details
	<p>Description</p> <p>Type ManageableState enumerated list</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Indicates the manageable state of the specified component that is contained in a package:</p> <ul style="list-style-type: none"> • beta • deleted • deprecated • deprecatedEditable • installed • installedEditable • released • unmanaged
MasterLabel	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Label assigned to the ProductSpecificationType object.</p>
NamespacePrefix	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>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 <i>namespacePrefix__componentName</i> notation.</p> <p>The namespace prefix can have one of the following values:</p> <ul style="list-style-type: none"> • In Developer Edition organizations, the namespace prefix is set to the namespace prefix of the organization for all objects that support it. There is an exception if an object is in an installed managed package. In that case, the object has the namespace prefix of the installed managed package. This field's value is the namespace prefix of the Developer Edition organization of the package developer. • In organizations that are not Developer Edition organizations, <code>NamespacePrefix</code> is only set for objects that are part of an installed managed package. There is no namespace prefix for all other objects.

ProductSpecificationRecType

Represents the association of a product specification type with record types defined on the Product object. The product specification record type also determines if the product specification is sold commercially or not. This object is available in API version 60.0 and later.

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

Supported SOAP API Calls

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

Supported REST API Methods

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

Special Access Rules

Ensure Product Catalog Management is enabled to access this object.

Fields

Field	Details
<code>DeveloperName</code>	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The unique name of the object in the API. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization. Label is Record Type Name.</p>
<code>IsCommercial</code>	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the product is sold commercially (<code>true</code>) or not (<code>false</code>). The default value is <code>true</code>.</p>
<code>Language</code>	<p>Type picklist</p>

Field**Details****Properties**

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

Description

Language of the product specification record type 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**

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`

Field	Details
	<ul style="list-style-type: none"> • installed • installedEditable • released • unmanaged
MasterLabel	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Label assigned to the ProductSpecificationRecType object.</p>
NamespacePrefix	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>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 <i>namespacePrefix__componentName</i> notation.</p> <p>The namespace prefix can have one of the following values:</p> <ul style="list-style-type: none"> • In Developer Edition organizations, the namespace prefix is set to the namespace prefix of the organization for all objects that support it. There is an exception if an object is in an installed managed package. In that case, the object has the namespace prefix of the installed managed package. This field's value is the namespace prefix of the Developer Edition organization of the package developer. • In organizations that are not Developer Edition organizations, <code>NamespacePrefix</code> is only set for objects that are part of an installed managed package. There is no namespace prefix for all other objects.
ProductSpecificationType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Required.</p> <p>Product specification type that's associated with the record type. This field is unique within your organization.</p> <p>The picklist values that are available to you depend on your industry solution and permission sets.</p>

Field	Details
RecordType	<p>Type sObject</p> <p>Properties Nillable</p> <p>Description Custom record type of Product2 object.</p>
RecordTypeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. ID of the product record type associated with the product specification type. This field is unique within your organization. This field is a relationship field.</p> <p>Relationship Name RecordType</p> <p>Relationship Type Lookup</p> <p>Refers To RecordType</p>

Product Discovery

Product Discovery provides a hierarchical catalog browsing experience to identify suitable products with text-based and faceted search.

[Product Discovery Business APIs](#)

Use the Product Discovery Business APIs, which are composite APIs, to search products or to discover catalogs, products, and categories during the product browsing experience.

[Product Discovery Standard Invocable Actions](#)

Use the standard invocable actions available with Product Discovery to find and retrieve product, category, and catalog details. Additionally, execute a qualification procedure, and search products with guided selection.

[Product Discovery Metadata API Types](#)

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

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer** Editions of Revenue Cloud

SEE ALSO:

[Salesforce Help: Configure Product Discovery Settings](#)

[Salesforce Help: Invoke Qualification Procedures During Product Discovery](#)

Product Discovery Business APIs

Use the Product Discovery Business APIs, which are composite APIs, to search products or to discover catalogs, products, and categories during the product browsing experience.

This table lists the available Product Discovery resources.

Resource	Description
/connect/cpq/catalogs/catalogId (POST)	Get catalog details for a specified catalog ID. This API is a composite API for Product Discovery.
/connect/cpq/catalogs (POST)	Get a paginated list of catalogs. This API is a composite API for Product Discovery.
/connect/cpq/categories (POST)	Get a list of categories and subcategories of a specified catalog. This API is a composite API for Product Discovery.
/connect/cpq/categories/categoryId (POST)	Get details of a category for a specified category ID. This API is a composite API for Product Discovery.
/connect/cpq/qualification (POST)	Run the qualification procedure on a list of product IDs. This API is a composite API for Product Discovery.
/connect/cpq/products/search (POST)	Retrieves a list of products based on a search query or search term. This API is a composite API for Product Discovery.
/connect/cpq/products/productId (POST)	Get product details, such as attributes, hierarchy, or cardinality, for a specified product ID. This API is a composite API for Product Discovery.
/connect/cpq/products (POST)	Get a list of products for a specified catalog, category, or subcategory. This API is a composite API for Product Discovery.
/connect/cpq/products/bulk (POST)	Retrieve details for multiple products. This API is a

Resource	Description
	composite API for Product Discovery.
/connect/cpq/products/guided-selection (POST)	Retrieve a list of products based on the response identifier or search terms of a guided selection. Guided selection captures user requirements to show suitable products.

Resources

Learn more about the available Product Discovery API resources.

Request Bodies

Learn more about the available Product Discovery API request bodies.

Response Bodies

Learn more about the available Product Discovery API response bodies.

Resources

Learn more about the available Product Discovery API resources.

[Catalog Details \(POST\)](#)

Get catalog details for a specified catalog ID. This API is a composite API for Product Discovery.

[Catalog List \(POST\)](#)

Get a paginated list of catalogs. This API is a composite API for Product Discovery.

[Categories List \(POST\)](#)

Get a list of categories and subcategories of a specified catalog. This API is a composite API for Product Discovery.

[Category Details \(POST\)](#)

Get details of a category for a specified category ID. This API is a composite API for Product Discovery.

[CPQ Base Bulk Details \(POST\)](#)

Retrieve details for multiple products. This API is a composite API for Product Discovery.

[Global Search \(POST\)](#)

Retrieves a list of products based on a search query or search term. This API is a composite API for Product Discovery.

[Guided Selection \(POST\)](#)

Retrieve a list of products based on the response identifier or search terms of a guided selection. Guided selection captures user requirements to show suitable products.

[Product Details \(POST\)](#)

Get product details, such as attributes, hierarchy, or cardinality, for a specified product ID. This API is a composite API for Product Discovery.

[Products List \(POST\)](#)

Get a list of products for a specified catalog, category, or subcategory. This API is a composite API for Product Discovery.

[Qualification \(POST\)](#)

Run the qualification procedure on a list of product IDs. This API is a composite API for Product Discovery.

Catalog Details (POST)

Get catalog details for a specified catalog ID. This API is a composite API for Product Discovery.

Resource

```
/connect/cpq/catalogs/catalogId
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/cpq/catalogs/OZSxx00000009hGAA
```

Available version

60.0

HTTP methods

POST

Request body for POST**JSON example**

```
{
  "correlationId": "9cbb9650-48c5-11ed-96d1-0afc185843b",
  "userContext": {
    "accountId": "001xx000000001AAA",
    "contactId": "003xx00000000D7AAI"
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
correlationId	String	Unique identifier value that's attached to the requests and messages, and accepts references to a particular transaction or event chain.	Optional	60.0
userContext	User Context Input	User context details. For example, account ID or contact ID.	Optional	60.0

Response body for POST

[CPQ Base Details](#)

Catalog List (POST)

Get a paginated list of catalogs. This API is a composite API for Product Discovery.

Resource

```
/connect/cpq/catalogs
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/cpq/catalogs
```

Available version

60.0

HTTP methods

POST

Request body for POST**JSON example**

```
{
  "correlationId": "9cbb9650-48c5-11ed-96d1-0afcf185843b",
  "limit": 10,
  "offset": 0,
  "orderBy": [
    "name:asc",
    "id:desc"
  ],
  "userContext": {
    "accountId": "001xx0000000001AAA",
    "contactId": "003xx000000000D7AAI"
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
correlation Id	String	Unique identifier value that's attached to the requests and messages, and accepts references to a particular transaction or event chain.	Optional	60.0
limit	Integer	Number of items to include in the response.	Optional	60.0
offset	Integer	Offset size from which to get the catalog count.	Optional	60.0
orderBy	String[]	Sort order for the catalogs.	Optional	60.0
userContext	User Context Input	User context details. For example, account ID or contact ID.	Optional	60.0

Response body for POST[CPQ Base List](#)

Categories List (POST)

Get a list of categories and subcategories of a specified catalog. This API is a composite API for Product Discovery.

Resource

```
/connect/cpq/categories
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/cpq/categories
```

Available version

60.0

HTTP methods

POST

Request body for POST

JSON example

```
{
  "correlationId": "9cbb9650-48c5-11ed-96d1-0afcf185843b",
  "catalogId": "0ZSxx000000009hGAA",
  "userContext": {
    "accountId": "001xx0000000001AAA",
    "contactId": "003xx000000000D7AAI"
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
catalogId	String	ID of the catalog.	Required	60.0
correlation Id	String	Unique identifier value that's attached to the requests and messages, and accepts references to a particular transaction or event chain.	Optional	60.0
userContext	User Context Input	User context details. For example, account ID or contact ID.	Optional	60.0

Response body for POST

[CPQ Base List](#)

Category Details (POST)

Get details of a category for a specified category ID. This API is a composite API for Product Discovery.

Resource

```
/connect/cpq/categories/categoryId
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/cpq/categories/0ZGxx000000001dGAA
```

Available version

60.0

HTTP methods

POST

Request body for POST**JSON example**

```
{
  "correlationId": "9cbb9650-48c5-11ed-96d1-0afcf185843b",
  "userContext": {
    "accountId": "001xx0000000001AAA",
    "contactId": "003xx000000000D7AAI"
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
correlationId	String	Unique identifier value that's attached to the requests and messages, and accepts references to a particular transaction or event chain.	Optional	60.0
userContext	User Context Input	User context details. For example, account ID or contact ID.	Optional	60.0

Response body for POST[CPQ Base Details](#)**CPQ Base Bulk Details (POST)**

Retrieve details for multiple products. This API is a composite API for Product Discovery.

Resource

```
/connect/cpq/products/bulk
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/cpq/products/bulk
```

Available version

61.0

HTTP methods

POST

Request body for POST**JSON example**

```

{
  "productData": [
    {
      "productId": "01txx0000006ivJAAQ",
      "productSellingModelId": "0jPxx000000009hEAA"
    },
    {
      "productId": "01txx0000006ivLAAQ",
      "productSellingModelId": "0jPxx000000009iEAABB"
    }
  ],
  "correlationId": "de9a674c-1807-438c-ac78-2c96f4655325",
  "priceBookId" : "01sxx0000005qxxAAA",
  "userContext": {
    "accountId": "001xx0000000001AAA",
    "contactId": "003xx000000000D7AAI"
  }
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
additional ContextData	Context Data Input[]	Additional nodes to add to the custom or default context definition. This data is appended to the context input and sent for hydration and qualification. The maximum limit of supported nodes is 10.	Optional	61.0
additional Fields	Map<String, Additional Fields Input>	Additional standard or custom fields of the Product2 object to include in the response. The field values are returned in the response for each of the products.	Optional	61.0
context Definition	String	Name of the custom context definition that's sent for the context creation. If unspecified, the default context definition is used.	Optional	61.0
context Mapping	String	Context mapping details from the context definition. If specified, the API validates if the context mapping belongs to the specified context definition and considers the mapping for hydration. If unspecified, the default context mapping of the context definition is used.	Optional	61.0

Name	Type	Description	Required or Optional	Available Version
correlationId	String	Unique token to track and associate related events or transactions across different components of the application. If unspecified, a Universally Unique Identifier (UUID) is generated.	Optional	61.0
currencyCode	String	Currency code to consider for pricing and filtering.	Optional	61.0
enablePricing	Boolean	Indicates whether to enable pricing for the products (<code>true</code>) or not (<code>false</code>). The default value is <code>true</code> . The Pricing Procedure toggle from the Product Discovery Settings page from Setup overrides this property. For example, if the Pricing Procedure toggle is disabled, then setting the <code>enablePricing</code> property to <code>true</code> has no effect and the <code>prices</code> property in the API response is returned empty.	Optional	61.0
enableQualification	Boolean	Indicates whether to enable qualification rules for the products (<code>true</code>) or not (<code>false</code>). The default value is <code>true</code> . The Qualification Procedure toggle from the Product Discovery Settings page from Setup overrides this property. For example, if the Qualification Procedure toggle is disabled, then setting the <code>enableQualification</code> property to <code>true</code> has no effect and the <code>qualificationContext</code> property in the API response isn't returned.	Optional	61.0
priceBookId	String	ID of the price book to fetch the prices from.	Optional	61.0
pricingProcedure	String	Name of the custom pricing procedure to send for processing. If unspecified, the default pricing procedure is executed.	Optional	61.0
productData	Product Data Input[]	List of maps that contain product IDs and product selling model IDs.	Required	61.0
qualificationProcedure	String	Name of the custom qualification procedure to send for processing. If unspecified, the default qualification procedure is executed.	Optional	61.0

Name	Type	Description	Required or Optional	Available Version
userContext	User Context Input[]	User context details. For example, account ID or contact ID.	Optional	61.0

Response body for POST[CPQ Base Bulk Details](#)**Global Search (POST)**

Retrieves a list of products based on a search query or search term. This API is a composite API for Product Discovery.

Resource

```
/connect/cpq/products/search
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/cpq/products/search
```

Available version

60.0

HTTP methods

POST

Request body for POST**JSON example**

This example shows a sample request to search products by using a query.

```
{
  "query": {
    "textQuery": {
      "searchPhrase": "firstproduct"
    }
  },
  "catalogId": "0ZSxx0000000001GAA",
  "categoryId": "0ZGT100000000q1OAA",
  "correlationId": "9cbb9650-48c5-11ed-96d1-0afcf185843b",
  "limit": 10,
  "cursor": "MTAwMDAwMDAwNg==",
  "orderBy": ["name:asc", "id:desc"],
  "userContext": {
    "accountId": "001xx0000000001AAA",
    "contactId": "003xx00000000D7AAI"
  },
  "additionalFields": {
    "Product2": {
      "fields": [
        "CustomField1__c",
        "CustomField2__c",
        "StandardField1"
      ]
    }
  }
}
```

```

    }
  }
}

```

This example shows a sample request to search products by using the `searchTerm` property.

```

{
  "searchTerm": "Laptop",
  "catalogId": "0ZSDU0000002Og64AE",
  "categoryId": "0ZGDU0000002P0A4AU",
  "correlationId": "d9d8f898-19f5-464a-ba2b-6a070783f6c4",
  "limit": 10,
  "cursor": "MTAwMDAwMDAwNw==",
  "orderBy": ["name:asc", "id:desc"],
  "userContext": {
    "accountId": "001DU000001o2V0YAI"
  }
}

```

If a parent category ID is specified in the request body, then the API returns all products associated to all child categories.

Properties

Name	Type	Description	Required or Optional	Available Version
additional ContextData	Context Data Input[]	Additional nodes that are added to the custom or default context definition. The maximum number of supported nodes is 10.	Optional	60.0
additional Fields	Map<String, Additional Fields Input>	Additional standard or custom fields of the Product2 object to include in the response. If the requested fields are invalid or access to fields isn't available, then the API throws an error.	Optional	61.0
catalogId	String	ID of the catalog. If the catalog ID is specified, then the API returns the list of offers from the catalog with the pricing details related to the catalog.	Optional	60.0
categoryId	String	ID of the category. If the category ID isn't specified, then the API returns the matching query offers from the catalog.	Optional	60.0
context Definition	String	API name of the custom context definition that's sent for context creation. If this property isn't specified, then the default context definition is used.	Optional	60.0
context Mapping	String	Default context mapping of the context definition. If a context mapping is	Optional	60.0

Name	Type	Description	Required or Optional	Available Version
		specified, then the API checks whether the mapping belongs to the specified context definition to process the details for hydration.		
correlationId	String	Unique identifier of the request.	Optional	60.0
currencyCode	String	Currency code that's considered for pricing and filtering request.	Optional	60.0
cursor	String	Unique ID to represent the position of each product in the dataset.	Optional	60.0
enablePricing	Boolean	Indicates whether to enable pricing for the products (<code>true</code>) or not (<code>false</code>). The default value is <code>true</code> . The Pricing Procedure toggle from the Product Discovery Settings page from Setup overrides this property. For example, if the Pricing Procedure toggle is disabled, then setting the <code>enablePricing</code> property to <code>true</code> has no effect and the <code>prices</code> property in the API response is returned empty.	Optional	60.0
enableQualification	Boolean	Indicates whether to enable qualification rules for the products (<code>true</code>) or not (<code>false</code>). The default value is <code>true</code> . The Qualification Procedure toggle from the Product Discovery Settings page from Setup overrides this property. For example, if the Qualification Procedure toggle is disabled, then setting the <code>enableQualification</code> property to <code>true</code> has no effect and the <code>qualificationContext</code> property in the API response isn't returned.	Optional	60.0
filter	Filter Input	Filters records based on supported criteria. The supported property is <code>name</code> . The supported operators are: <ul style="list-style-type: none"> • <code>eq</code> • <code>in</code> • <code>contains</code> 	Optional	60.0

Name	Type	Description	Required or Optional	Available Version
		<ul style="list-style-type: none"> <code>gt</code>—Specifies a greater than criteria. Available from API version 63.0 and later for Number, Date, and Datetime data types only. <code>lt</code>—Specifies a less than criteria. Available from API version 63.0 and later for Number, Date, and Datetime data types only. <code>gte</code>—Specifies a greater than or equal to criteria. Available from API version 63.0 and later for Number, Date, and Datetime data types only. <code>lte</code>—Specifies a less than or equal to criteria. Available from API version 63.0 and later for Number, Date, and Datetime data types only. <p>If multiple criteria are specified, then the resultant criteria are combined by using the <code>and</code> operator.</p>		
<code>includeCatalogDetails</code>	Boolean	Indicates whether to include catalog details in the response (<code>true</code>) or not (<code>false</code>).	Optional	61.0
<code>limit</code>	Integer	Number of items to include in the response. The default value is 10.	Optional	60.0
<code>offset</code>	Integer	Reserved for internal use.	Optional	60.0
<code>orderBy</code>	String[]	Sort order of the results, which is either ascending or descending order. The default sort order is ascending order. The default value is <code>asc</code> .	Optional	60.0
<code>priceBookId</code>	String	ID of the price book to get the prices from. If this property isn't specified, then prices from the standard price book are fetched.	Optional	60.0
<code>pricingProcedure</code>	String	API name of the custom pricing procedure that's used for the pricing process. If this property isn't specified, then the default pricing procedure is executed.	Optional	60.0

Name	Type	Description	Required or Optional	Available Version
product Classification Id	String	ID of the product classification.	Optional	60.0
qualification Procedure	String	API name of the custom qualification procedure that's used for the product qualification process. If this property isn't specified, then the default qualification procedure is executed.	Optional	60.0
query	Map<String, Object>>	Query to search the products.	Required	60.0
related ObjectFilter	Related Object Filter Input[]	Filter records based on supported criteria for related objects. The supported object is <code>ProductSpecificationRecType</code> . The supported property is <code>IsCommerical</code> . The supported operator is <code>eq</code> . The supported values are <code>true</code> and <code>false</code> .	Optional	60.0
searchTerm	String	String used to get products with the product name containing the search term. See Search Considerations When Using Indexed Data .	Optional	62.0
userContext	User Context Input	User context details. For example, account ID or contact ID.	Optional	60.0

Response body for POST[CPQ Base List](#)**Guided Selection (POST)**

Retrieve a list of products based on the response identifier or search terms of a guided selection. Guided selection captures user requirements to show suitable products.

Resource

```
/connect/cpq/products/guided-selection
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/cpq/products/guided-selection
```

Available version

62.0

HTTP methods

POST

Request body for POST**JSON example**

This input request includes properties from the Products List API. To learn about the other input properties, see [Products List \(POST\)](#).

```
{
  "correlationId": "corrId",
  "catalogId": "0ZSxx0000000001GAA",
  "priceBookId": "pricebookId",
  "limit": 10,
  "cursor": "MTAwMDAwMDAwNg==",
  "userContext": {
    "accountId": "accId"
  },
  "guidedSelectionResponseId": "ABCxx0000000001GAA",
  "searchTerms": [
    {
      "term": "IPhone"
    },
    {
      "term": "4GB"
    },
    {
      "term": "64GB"
    }
  ],
  "enableQualification": true,
  "enablePricing": true,
  "includeCatalogDetails": false
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
guidedSelectionResponseId	String	Response identifier of the guided selection.	Required if the searchTerms property isn't specified.	62.0
searchTerms	Guided Selection Search Term Input[]	Search terms of the guided selection.	Required if the guidedSelectionResponseId property isn't specified.	62.0

If both the `guidedSelectionResponseId` and `searchTerms` properties are specified, then the `searchTerms` property is considered in the input request.

Response body for POST

[Guided Selection](#)

Product Details (POST)

Get product details, such as attributes, hierarchy, or cardinality, for a specified product ID. This API is a composite API for Product Discovery.

Resource

```
/connect/cpq/products/productId
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/cpq/products/01txx0000006j08AAA
```

Available version

60.0

HTTP methods

POST

Request body for POST

JSON example

```
{
  "correlationId": "9cbb9650-48c5-11ed-96d1-0afcf185843b",
  "catalogId": "0ZSxx0000000001GAA",
  "priceBookId": "01s26000002ZT71AAG",
  "productSellingModelId": "0jP1Q000000CaVFUA0",
  "userContext": {
    "accountId": "001xx000000001AAA",
    "contactId": "003xx00000000D7AAI"
  },
  "enablePricing": true,
  "enableQualification": true,
  "qualificationProcedure": "QualificationProcedure",
  "pricingProcedure": "Preview",
  "contextDefinition": "TestDefinition",
  "contextMapping": "TestDefinitionNode",
  "additionalFields": {
    "Product2": {
      "fields": [
        "field1",
        "field2"
      ]
    },
    "ProductAttributeDefinition": {
      "fields": [
        "field3",
        "field4"
      ]
    }
  }
}
```



```

"additionalContextData":
[
  {
    "nodeName": "Contract",
    "nodeData":
    {
      "id": "xxxxxx231",
      "name": "Contract1"
    }
  },
  {
    "nodeName": "Lead",
    "nodeData":
    {
      "id": "1111111131",
      "name": "Lead1"
    }
  }
]
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
additionalContextData	Context Data Input[]	Additional nodes that are added to the custom or default context definition. The maximum number of supported nodes is 10.	Optional	60.0
additionalFields	Map<String, Additional Fields Input>	Additional standard or custom fields to include in the response. The supported objects are: <ul style="list-style-type: none"> Product2 ProductAttributeDefinition—If the fields defined for the ProductAttributeDefinition object aren't available for the ProductClassificationAttr object, then the API request fails. 	Optional	61.0
catalogId	String	ID of the catalog. If the catalog ID is specified, then the API returns the list of offers from the catalog with the pricing details related to the catalog.	Optional	60.0
contextDefinition	String	API name of the custom context definition that's sent for context creation. If this property isn't specified, then the default context definition is used.	Optional	60.0
contextMapping	String	Default context mapping of the context definition. If a context mapping is	Optional	60.0

Name	Type	Description	Required or Optional	Available Version
		specified, then the API checks whether the mapping belongs to the specified context definition to process the details for hydration.		
correlation Id	String	Unique identifier value that's attached to the requests and messages, and accepts references to a particular transaction or event chain.	Optional	60.0
currencyCode	String	Currency code that's considered for pricing and filtering request. If multiple currencies are enabled for the org, then the <code>currencyCode</code> property is required.	Optional	60.0
enable Pricing	Boolean	Indicates whether to enable pricing for the products (<code>true</code>) or not (<code>false</code>). The default value is <code>true</code> . The Pricing Procedure toggle from the Product Discovery Settings page from Setup overrides this property. For example, if the Pricing Procedure toggle is disabled, then setting the <code>enablePricing</code> property to <code>true</code> has no effect and the <code>prices</code> property in the API response is returned empty.	Optional	60.0
enable Qualification	Boolean	Indicates whether to enable qualification rules for the products (<code>true</code>) or not (<code>false</code>). The default value is <code>true</code> . The Qualification Procedure toggle from the Product Discovery Settings page from Setup overrides this property. For example, if the Qualification Procedure toggle is disabled, then setting the <code>enableQualification</code> property to <code>true</code> has no effect and the <code>qualificationContext</code> property in the API response isn't returned.	Optional	60.0
priceBookId	String	ID of the price book to fetch the prices from. If this property isn't specified, then the prices from the standard price book are fetched.	Required	60.0

Name	Type	Description	Required or Optional	Available Version
pricing Procedure	String	API name of the custom pricing procedure that's used for the pricing process. If this property isn't specified, then the default pricing procedure is executed.	Optional	60.0
product SellingModel Id	String	ID of the product selling model.	Optional	60.0
qualification Procedure	String	API name of the custom qualification procedure that's used for the product qualification process. If this property isn't specified, then the default qualification procedure is executed.	Optional	60.0
userContext	User Context Input	User context details. For example, account ID or contact ID.	Optional	60.0

Response body for POST[CPQ Base Details](#)**Products List (POST)**

Get a list of products for a specified catalog, category, or subcategory. This API is a composite API for Product Discovery.

Resource

```
/connect/cpq/products
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/cpq/products
```

Available version

60.0

HTTP methods

POST

Request body for POST**JSON example**

```
{
  "correlationId": "eeaa1db2-f371-4227-a886-c77e2f66ce1d",
  "limit": 60,
  "cursor": "MTAwMDAwMDAwNg==",
  "orderBy": [
    "name:asc"
  ],
  "catalogId": "0ZSDU0000002Og74AE",
```

```

"categoryId": "0ZGDU000002P0H4AU",
"priceBookId": "01sDU000000JVsvYAW",
"productClassificationId": "11BDU0000002TCC2A2",
"currencyCode": "USD",
"userContext": {
  "accountId": "001DU000001o2UzYAI"
},
"includeCatalogDetails": true,
"enableQualification": true,
"enablePricing": true,
"qualificationProcedure": "ProductQualification",
"pricingProcedure": "pricingProcedure",
"contextDefinition": "BrowseContextDefinitionExt",
"contextMapping": "ProductDiscoveryMapping",
"filter": {
  "criteria": [
    {
      "property": "name",
      "operator": "eq",
      "value": "Laptop Pro Bundle"
    }
  ]
},
"relatedObjectFilters": [
  {
    "objectName": "ProductSpecificationRecType",
    "criteria": [
      {
        "property": "IsCommercial",
        "operator": "eq",
        "value": true
      }
    ]
  }
],
"additionalContextData": [
  {
    "nodeName": "Account",
    "nodeData": {
      "id": "001DU000001o2UzYAI",
      "name": "Cloud Kicks"
    }
  }
],
"additionalFields": {
  "Product2": {
    "fields": [
      "CanRamp",
      "DecompositionScope",
      "ProductCode"
    ]
  }
}
}

```

If a parent category ID is specified in the request body, then the API returns all products associated to all child categories.

Properties

Name	Type	Description	Required or Optional	Available Version
additional ContextData	Context Data Input[]	Additional nodes that are added to the custom or default context definition. The maximum number of supported nodes is 10.	Optional	60.0
additional Fields	Map<String, Additional Fields Input >	Additional standard or custom fields of the Product2 object to include in the response. If the requested fields are invalid or access to fields isn't available, then the API throws an error.	Optional	61.0
catalogId	String	ID of the catalog. If the catalog ID is specified, then the API returns the list of offers from the catalog with the pricing details related to the catalog.	Optional	60.0
categoryId	String	ID of the category. If the category ID isn't specified, then the API returns the list of offers from the catalog.	Optional	60.0
context Definition	String	API name of the custom context definition that's sent for context creation. If this property isn't specified, then the default context definition is used.	Optional	60.0
context Mapping	String	Default context mapping of the context definition. If a context mapping is specified, then the API checks whether the mapping belongs to the specified context definition to process the details for hydration.	Optional	60.0
correlation Id	String	Unique identifier of the request.	Optional	60.0
currencyCode	String	Currency code that's considered for pricing and filtering request. If multiple currencies are enabled for the org, then the <code>currencyCode</code> property is required.	Optional	60.0
cursor	String	Unique ID to represent the position of each product in the dataset.	Optional	60.0

Name	Type	Description	Required or Optional	Available Version
enablePricing	Boolean	<p>Indicates whether to enable pricing for the products (<code>true</code>) or not (<code>false</code>). The default value is <code>true</code>.</p> <p>The Pricing Procedure toggle from the Product Discovery Settings page from Setup overrides this property. For example, if the Pricing Procedure toggle is disabled, then setting the <code>enablePricing</code> property to <code>true</code> has no effect and the <code>prices</code> property in the API response is returned empty.</p>	Optional	60.0
enableQualification	Boolean	<p>Indicates whether to enable qualification rules for the products (<code>true</code>) or not (<code>false</code>). The default value is <code>true</code>.</p> <p>The Qualification Procedure toggle from the Product Discovery Settings page from Setup overrides this property. For example, if the Qualification Procedure toggle is disabled, then setting the <code>enableQualification</code> property to <code>true</code> has no effect and the <code>qualificationContext</code> property in the API response isn't returned.</p>	Optional	60.0
filter	Filter Input	<p>Filters records based on supported criteria.</p> <p>The supported property is <code>name</code>.</p> <p>The supported operators are:</p> <ul style="list-style-type: none"> <code>eq</code> <code>in</code> <code>contains</code>—This value isn't applicable if the Use Indexed Data For Product Listing and Search toggle from the Product Discovery Settings page from Setup is enabled. <p>If multiple criteria are specified, then the resultant criteria are combined by using the <code>and</code> operator.</p>	Optional	60.0
includeCatalogDetails	Boolean	<p>Indicates whether to include catalog details in the response (<code>true</code>) or not (<code>false</code>).</p>	Optional	61.0

Name	Type	Description	Required or Optional	Available Version
limit	Integer	Number of items to include in the response. The default value is 10.	Optional	60.0
offset	Integer	Reserved for internal use.	Optional	60.0
orderBy	String[]	Sort order of the results, which is either ascending (<code>asc</code>) or descending order (<code>desc</code>). The default sort order is ascending order. The default value is <code>asc</code> . If the Use Indexed Data For Product Listing and Search toggle from the Product Discovery Settings page from Setup is enabled, then you can sort products by using name only.	Optional	60.0
priceBookId	String	ID of the price book to get the prices from. If this property isn't specified, then prices from the standard price book are fetched.	Required	60.0
pricing Procedure	String	API name of the custom pricing procedure that's used for the pricing process. If this property isn't specified, then the default pricing procedure is executed.	Optional	60.0
product Classification Id	String	ID of the product classification.	Optional	60.0
qualification Procedure	String	API name of the custom qualification procedure that's used for the product qualification process. If this property isn't specified, then the default qualification procedure is executed.	Optional	60.0
related Object Filters	Related Object Filter Input[]	Filter records based on supported criteria for related objects. The supported object is <code>ProductSpecificationRecType</code> . The supported property is <code>IsCommerical</code> . The supported operator is <code>eq</code> . The supported values are <code>true</code> and <code>false</code> .	Optional	60.0

Name	Type	Description	Required or Optional	Available Version
userContext	User Context Input	User context details. For example, account ID or contact ID.	Optional	60.0

Response body for POST[CPQ Base List](#)**Qualification (POST)**

Run the qualification procedure on a list of product IDs. This API is a composite API for Product Discovery.

Resource

```
/connect/cpq/qualification
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/cpq/qualification
```

Available version

60.0

HTTP methods

POST

Request body for POST**JSON example**

```
{
  "productIds": [
    "01txx0000006i7PAAQ",
    "01txx0000006i7QAAQ",
    "01txx0000006i7IAAQ"
  ],
  "userContext": {
    "accountId": "001xx000003GZHgAAO"
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
additionalContextData	Context Data Input[]	Additional nodes that are added to the custom or default context definition. The maximum number of supported nodes is 10.	Optional	60.0
catalogId	String	ID of the catalog.	Optional	60.0
categoryId	String	ID of the category.	Optional	60.0

Name	Type	Description	Required or Optional	Available Version
context Definition	String	API name of the custom context definition that's sent for context creation. If this property isn't specified, the default context definition is used.	Optional	60.0
context Mapping	String	Default context mapping of the context definition. If a context mapping is specified, then the API checks whether the mapping belongs to the specified context definition to process the details for hydration.	Optional	60.0
correlation Id	String	Unique identifier of the request.	Optional	60.0
productIds	String[]	List of product IDs for qualification check.	Required	60.0
qualification Procedure	String	API name of the custom qualification procedure that's sent for processing. If this property isn't specified, the default qualification procedure is executed.	Optional	60.0
userContext	User Context Input	User context details. For example, account ID or contact ID.	Optional	60.0

Response body for POST

[CPQ Base List](#)

Request Bodies

Learn more about the available Product Discovery API request bodies.

[Additional Fields Input](#)

Input representation of the additional standard or custom fields to include in the response.

[Bulk Product Details Input](#)

Input representation of the request to retrieve details of multiple products.

[Catalog Details Input](#)

Input representation of the request to get the catalog details.

[Catalog List Input](#)

Input representation of the request to get a list of catalogs.

[Category Details Input](#)

Input representation of the request to get category details.

[Category List Input](#)

Input representation of the request to get a list of categories.

[Context Data Input](#)

Input representation of the context data.

[Guided Selection Input](#)

Input representation of the guided selection details.

[Guided Selection Search Term Input](#)

Input representation of the search terms of a guided selection.

[Filter Criteria Input](#)

Input representation of the criteria to filter records based on supported properties.

[Filter Input](#)

Input representation of the request to filter records.

[Product Details Input](#)

Input representation of the request to get product details.

[Product Data Input](#)

Input representation of the product details such as the product ID and product selling model ID.

[Product List Input](#)

Input representation of the request to retrieve a list of products.

[Products Search Input](#)

Input representation of the request to search products.

[QOC Qualification](#)

Input representation of the qualification request.

[Related Object Filter Input](#)

Input representation of the request to filter records of a related object.

[User Context Input](#)

Input representation of the details with the user context.

Additional Fields Input

Input representation of the additional standard or custom fields to include in the response.

JSON example

```

"additionalFields" : {
  "Product2" : {
    "fields" : ["CustomField1__c","StandardField1"]
  }
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
fields	String[]	List of additional standard or custom fields to include in the response.	Optional	61.0

Bulk Product Details Input

Input representation of the request to retrieve details of multiple products.

JSON example

```
{
  "productData": [
    {
      "productId": "01txx0000006ivJAAQ",
      "productSellingModelId": "0jPxx000000009hEAA"
    },
    {
      "productId": "01txx0000006ivLAAQ",
      "productSellingModelId": "0jPxx000000009iEAABB"
    }
  ],
  "correlationId": "de9a674c-1807-438c-ac78-2c96f4655325",
  "priceBookId": "01sxx0000005qxxAAA",
  "userContext": {
    "accountId": "001xx0000000001AAA",
    "contactId": "003xx000000000D7AAI"
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
additional ContextData	Context Data Input []	Additional nodes to add to the custom or default context definition. This data is appended to the context input and sent for hydration and qualification. The maximum limit of supported nodes is 10.	Optional	61.0
additional Fields	Map<String, Additional Fields Input >	Additional standard or custom fields of the Product2 object to include in the response. The field values are returned in the response for each of the products.	Optional	61.0
context Definition	String	Name of the custom context definition that's sent for the context creation. If unspecified, the default context definition is used.	Optional	61.0
context Mapping	String	Context mapping details from the context definition. If specified, the API validates if the context mapping belongs to the specified context definition and considers the mapping for hydration. If unspecified, the default context mapping of the context definition is used.	Optional	61.0

Name	Type	Description	Required or Optional	Available Version
correlationId	String	Unique token to track and associate related events or transactions across different components of the application. If unspecified, a Universally Unique Identifier (UUID) is generated.	Optional	61.0
currencyCode	String	Currency code to consider for pricing and filtering.	Optional	61.0
enablePricing	Boolean	Indicates whether to enable pricing for the products (<code>true</code>) or not (<code>false</code>). The default value is <code>true</code> . The Pricing Procedure toggle from the Product Discovery Settings page from Setup overrides this property. For example, if the Pricing Procedure toggle is disabled, then setting the <code>enablePricing</code> property to <code>true</code> has no effect and the <code>prices</code> property in the API response is returned empty.	Optional	61.0
enableQualification	Boolean	Indicates whether to enable qualification rules for the products (<code>true</code>) or not (<code>false</code>). The default value is <code>true</code> . The Qualification Procedure toggle from the Product Discovery Settings page from Setup overrides this property. For example, if the Qualification Procedure toggle is disabled, then setting the <code>enableQualification</code> property to <code>true</code> has no effect and the <code>qualificationContext</code> property in the API response isn't returned.	Optional	61.0
priceBookId	String	ID of the price book to fetch the prices from.	Optional	61.0
pricingProcedure	String	Name of the custom pricing procedure to send for processing. If unspecified, the default pricing procedure is executed.	Optional	61.0
productData	Product Data Input []	List of maps that contain product IDs and product selling model IDs.	Required	61.0
qualificationProcedure	String	Name of the custom qualification procedure to send for processing. If unspecified, the default qualification procedure is executed.	Optional	61.0

Name	Type	Description	Required or Optional	Available Version
userContext	User Context Input []	User context details. For example, account ID or contact ID.	Optional	61.0

Catalog Details Input

Input representation of the request to get the catalog details.

JSON example

```
{
  "correlationId": "9cbb9650-48c5-11ed-96d1-0afcf185843b",
  "userContext": {
    "accountId": "001xx0000000001AAA",
    "contactId": "003xx000000000D7AAI"
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
correlationId	String	Unique identifier value that's attached to the requests and messages, and accepts references to a particular transaction or event chain.	Optional	60.0
userContext	User Context Input	User context details. For example, account ID or contact ID.	Optional	60.0

Catalog List Input

Input representation of the request to get a list of catalogs.

JSON example

```
{
  "correlationId": "9cbb9650-48c5-11ed-96d1-0afcf185843b",
  "limit": 10,
  "offset": 0,
  "orderBy": [
    "name:asc",
    "id:desc"
  ],
  "userContext": {
    "accountId": "001xx0000000001AAA",
    "contactId": "003xx000000000D7AAI"
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
correlationId	String	Unique identifier value that's attached to the requests and messages, and accepts references to a particular transaction or event chain.	Optional	60.0
limit	Integer	Number of items to include in the response.	Optional	60.0
offset	Integer	Offset size from which to get the catalog count.	Optional	60.0
orderBy	String[]	Sort order for the catalogs.	Optional	60.0
userContext	User Context Input	User context details. For example, account ID or contact ID.	Optional	60.0

Category Details Input

Input representation of the request to get category details.

JSON example

```
{
  "correlationId": "9cbb9650-48c5-11ed-96d1-0afcf185843b",
  "userContext": {
    "accountId": "001xx0000000001AAA",
    "contactId": "003xx000000000D7AAI"
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
correlationId	String	Unique identifier value that's attached to the requests and messages, and accepts references to a particular transaction or event chain.	Optional	60.0
userContext	User Context Input	User context details. For example, account ID or contact ID.	Optional	60.0

Category List Input

Input representation of the request to get a list of categories.

JSON example

```
{
  "correlationId": "9cbb9650-48c5-11ed-96d1-0afcf185843b",
  "catalogId": "0ZSxx000000009hGAA",
  "userContext": {
    "accountId": "001xx000000001AAA",
    "contactId": "003xx00000000D7AAI"
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
catalogId	String	ID of the catalog.	Required	60.0
correlationId	String	Unique identifier value that's attached to the requests and messages, and accepts references to a particular transaction or event chain.	Optional	60.0
userContext	User Context Input	User context details. For example, account ID or contact ID.	Optional	60.0

Context Data Input

Input representation of the context data.

JSON example

```
"additionalContextData": [
  {
    "nodeName": "Contract",
    "nodeData": {
      "id": "xxxxxx231",
      "name": "Contract1"
    }
  },
  {
    "nodeName": "Lead",
    "nodeData": {
      "id": "111111131",
      "name": "Lead1"
    }
  }
]
```

Properties

Name	Type	Description	Required or Optional	Available Version
nodeData	Map<String, Object>	Details of the node.	Optional	60.0
nodeName	String	Name of the node.	Optional	60.0

Guided Selection Input

Input representation of the guided selection details.

JSON example

This input request includes properties from the Products List API. To learn about the other input properties, see [Products List \(POST\)](#).

```
{
  "correlationId": "corrId",
  "catalogId": "0ZSxx0000000001GAA",
  "priceBookId": "pricebookId",
  "limit": 10,
  "cursor": "MTAwMDAwMDAwNg==",
  "userContext": {
    "accountId": "accId"
  },
  "guidedSelectionResponseId": "ABCxx0000000001GAA",
  "searchTerms": [
    {
      "term": "IPhone"
    },
    {
      "term": "4GB"
    },
    {
      "term": "64GB"
    }
  ],
  "enableQualification": true,
  "enablePricing": true,
  "includeCatalogDetails": false
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
guidedSelectionResponseId	String	Response identifier of the guided selection.	Required if the searchTerms property isn't specified.	62.0

Name	Type	Description	Required or Optional	Available Version
searchTerms	Guided Selection Search Term Input	Search terms of the guided selection.	Required if the guided Selection ResponseId property isn't specified.	62.0

If both the `guidedSelectionResponseId` and `searchTerms` properties are specified, then the `searchTerms` property is considered in the input request.

Guided Selection Search Term Input

Input representation of the search terms of a guided selection.

JSON example

```
"searchTerms": [
  {
    "term": "iPhone"
  },
  {
    "term": "4GB"
  },
  {
    "term": "64GB"
  }
]
```

Properties

Name	Type	Description	Required or Optional	Available Version
term	String	Search term for the guided selection.	Required	62.0

Filter Criteria Input

Input representation of the criteria to filter records based on supported properties.

JSON example

```
"criteria":
[
  {
    "attributeType": "ProductStandard",
    "property": "name",
    "operator": "eq",
    "value": "iPhone"
  }
]
```

Properties

Name	Type	Description	Required or Optional	Available Version
<code>attributeType</code>	String	Search attribute type of the facet for a faceted search. Valid values are: <ul style="list-style-type: none"> • <code>ProductStandard</code> • <code>ProductCustom</code> • <code>ProductDynamicAttribute</code> • <code>ProductAttributeStandard</code> • <code>ProductAttributeCustom</code> 	Optional	63.0
<code>operator</code>	String	Operator used for the filter criteria. The supported operators are: <ul style="list-style-type: none"> • <code>eq</code> • <code>in</code> • <code>contains</code> • <code>gt</code>—Specifies a greater than criteria. Available from API version 63.0 and later for Number, Date, and Datetime data types only. • <code>lt</code>—Specifies a less than criteria. Available from API version 63.0 and later for Number, Date, and Datetime data types only. • <code>gte</code>—Specifies a greater than or equal to criteria. Available from API version 63.0 and later for Number, Date, and Datetime data types only. • <code>lte</code>—Specifies a less than or equal to criteria. Available from API version 63.0 and later for Number, Date, and Datetime data types only. 	Required	60.0
<code>property</code>	String	Property name to use in the filter, which must be the same as the object field. The supported property is <code>name</code> .	Required	60.0
<code>value</code>	Object	Value for the filter criteria.	Required	60.0

Filter Input

Input representation of the request to filter records.

JSON example

```
"filter":
  {"criteria":
    [ {
      "attributeType": "ProductStandard",
      "property": "name",
      "operator": "eq",
      "value": "iPhone"
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
criteria	FilterCriteria Input []	Filter criteria to filter the records.	Optional	60.0

Product Details Input

Input representation of the request to get product details.

JSON example

```
{
  "correlationId": "9cbb9650-48c5-11ed-96d1-0afcf185843b",
  "catalogId": "0ZSxx0000000001GAA",
  "priceBookId": "01s26000002ZT71AAG",
  "productSellingModelId": "0jP1Q000000CaVFUA0",
  "userContext": {
    "accountId": "001xx0000000001AAA",
    "contactId": "003xx000000000D7AAI"
  },
  "enablePricing": true,
  "enableQualification": true,
  "qualificationProcedure": "QualificationProcedure",
  "pricingProcedure": "Preview",
  "contextDefinition": "TestDefinition",
  "contextMapping": "TestDefinitionNode",
  "additionalFields": {
    "Product2": {
      "fields": [
        "field1",
        "field2"
      ]
    },
    "ProductAttributeDefinition": {
      "fields": [
        "field3",
        "field4"
      ]
    }
  },
  "additionalContextData":
```

```
[{
  "nodeName": "Contract",
  "nodeData":
  {
    "id": "xxxxxx231",
    "name": "Contract1"
  }
},
{
  "nodeName": "Lead",
  "nodeData":
  {
    "id": "1111111131",
    "name": "Lead1"
  }
}
]]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
additional ContextData	Context Data Input []	Additional nodes that are added to the custom or default context definition. The maximum number of supported nodes is 10.	Optional	60.0
additional Fields	Map<String, Additional Fields Input >	Additional standard or custom fields to include in the response. The supported objects are: <ul style="list-style-type: none"> Product2 ProductAttributeDefinition—If the fields defined for the ProductAttributeDefinition object aren't available for the ProductClassificationAttr object, then the API request fails. 	Optional	61.0
catalogId	String	ID of the catalog. If the catalog ID is specified, then the API returns the list of offers from the catalog with the pricing details related to the catalog.	Optional	60.0
context Definition	String	API name of the custom context definition that's sent for context creation. If this property isn't specified, then the default context definition is used.	Optional	60.0
context Mapping	String	Default context mapping of the context definition. If a context mapping is specified, then the API checks whether the	Optional	60.0

Name	Type	Description	Required or Optional	Available Version
		mapping belongs to the specified context definition to process the details for hydration.		
<code>correlationId</code>	String	Unique identifier value that's attached to the requests and messages, and accepts references to a particular transaction or event chain.	Optional	60.0
<code>currencyCode</code>	String	Currency code that's considered for pricing and filtering request. If multiple currencies are enabled for the org, then the <code>currencyCode</code> property is required.	Optional	60.0
<code>enablePricing</code>	Boolean	Indicates whether to enable pricing for the products (<code>true</code>) or not (<code>false</code>). The default value is <code>true</code> . The Pricing Procedure toggle from the Product Discovery Settings page from Setup overrides this property. For example, if the Pricing Procedure toggle is disabled, then setting the <code>enablePricing</code> property to <code>true</code> has no effect and the <code>prices</code> property in the API response is returned empty.	Optional	60.0
<code>enableQualification</code>	Boolean	Indicates whether to enable qualification rules for the products (<code>true</code>) or not (<code>false</code>). The default value is <code>true</code> . The Qualification Procedure toggle from the Product Discovery Settings page from Setup overrides this property. For example, if the Qualification Procedure toggle is disabled, then setting the <code>enableQualification</code> property to <code>true</code> has no effect and the <code>qualificationContext</code> property in the API response isn't returned.	Optional	60.0
<code>priceBookId</code>	String	ID of the price book to fetch the prices from. If this property isn't specified, then the prices from the standard price book are fetched.	Required	60.0
<code>pricingProcedure</code>	String	API name of the custom pricing procedure that's used for the pricing process. If this	Optional	60.0

Name	Type	Description	Required or Optional	Available Version
		property isn't specified, then the default pricing procedure is executed.		
product SellingModel Id	String	ID of the product selling model.	Optional	60.0
qualification Procedure	String	API name of the custom qualification procedure that's used for the product qualification process. If this property isn't specified, then the default qualification procedure is executed.	Optional	60.0
userContext	User Context Input	User context details. For example, account ID or contact ID.	Optional	60.0

Product Data Input

Input representation of the product details such as the product ID and product selling model ID.

JSON example

```
"productData": [
  {
    "productId": "01txx0000006ivJAAQ",
    "productSellingModelId": "0jPxx000000009hEAA"
  },
  {
    "productId": "01txx0000006ivLAAQ",
    "productSellingModelId": "0jPxx000000009iEAABB"
  }
]
```

Properties

Name	Type	Description	Required or Optional	Available Version
productId	String	ID of the product.	Required	61.0
product SellingModelId	String	ID of the product selling model.	Optional	61.0

Product List Input

Input representation of the request to retrieve a list of products.

JSON example

```

{
  "correlationId": "eaaa1db2-f371-4227-a886-c77e2f66ce1d",
  "limit": 60,
  "cursor": "MTAwMDAwMDAwNg==",
  "orderBy": [
    "name:asc"
  ],
  "catalogId": "0ZSDU0000002Og74AE",
  "categoryId": "0ZGDU0000002POH4AU",
  "priceBookId": "01sDU000000JVsvYAW",
  "productClassificationId": "11BDU0000002TCC2A2",
  "currencyCode": "USD",
  "userContext": {
    "accountId": "001DU000001o2UzYAI"
  },
  "includeCatalogDetails": true,
  "enableQualification": true,
  "enablePricing": true,
  "qualificationProcedure": "ProductQualification",
  "pricingProcedure": "pricingProcedure",
  "contextDefinition": "BrowseContextDefinitionExt",
  "contextMapping": "ProductDiscoveryMapping",
  "filter": {
    "criteria": [
      {
        "property": "name",
        "operator": "eq",
        "value": "Laptop Pro Bundle"
      }
    ]
  },
  "relatedObjectFilters": [
    {
      "objectName": "ProductSpecificationRecType",
      "criteria": [
        {
          "property": "IsCommercial",
          "operator": "eq",
          "value": true
        }
      ]
    }
  ],
  "additionalContextData": [
    {
      "nodeName": "Account",
      "nodeData": {
        "id": "001DU000001o2UzYAI",
        "name": "Cloud Kicks"
      }
    }
  ],
}

```

```

"additionalFields": {
  "Product2": {
    "fields": [
      "CanRamp",
      "DecompositionScope",
      "ProductCode"
    ]
  }
}
}

```

If a parent category ID is specified in the request body, then the API returns all products associated to all child categories.

Properties

Name	Type	Description	Required or Optional	Available Version
additionalContextData	Context Data Input []	Additional nodes that are added to the custom or default context definition. The maximum number of supported nodes is 10.	Optional	60.0
additionalFields	Map<String, Additional Fields Input >	Additional standard or custom fields of the Product2 object to include in the response. If the requested fields are invalid or access to fields isn't available, then the API throws an error.	Optional	61.0
catalogId	String	ID of the catalog. If the catalog ID is specified, then the API returns the list of offers from the catalog with the pricing details related to the catalog.	Optional	60.0
categoryId	String	ID of the category. If the category ID isn't specified, then the API returns the list of offers from the catalog.	Optional	60.0
contextDefinition	String	API name of the custom context definition that's sent for context creation. If this property isn't specified, then the default context definition is used.	Optional	60.0
contextMapping	String	Default context mapping of the context definition. If a context mapping is specified, then the API checks whether the mapping belongs to the specified context definition to process the details for hydration.	Optional	60.0
correlationId	String	Unique identifier of the request.	Optional	60.0

Name	Type	Description	Required or Optional	Available Version
<code>currencyCode</code>	String	Currency code that's considered for pricing and filtering request. If multiple currencies are enabled for the org, then the <code>currencyCode</code> property is required.	Optional	60.0
<code>cursor</code>	String	Unique ID to represent the position of each product in the dataset.	Optional	60.0
<code>enablePricing</code>	Boolean	Indicates whether to enable pricing for the products (<code>true</code>) or not (<code>false</code>). The default value is <code>true</code> . The Pricing Procedure toggle from the Product Discovery Settings page from Setup overrides this property. For example, if the Pricing Procedure toggle is disabled, then setting the <code>enablePricing</code> property to <code>true</code> has no effect and the <code>prices</code> property in the API response is returned empty.	Optional	60.0
<code>enableQualification</code>	Boolean	Indicates whether to enable qualification rules for the products (<code>true</code>) or not (<code>false</code>). The default value is <code>true</code> . The Qualification Procedure toggle from the Product Discovery Settings page from Setup overrides this property. For example, if the Qualification Procedure toggle is disabled, then setting the <code>enableQualification</code> property to <code>true</code> has no effect and the <code>qualificationContext</code> property in the API response isn't returned.	Optional	60.0
<code>filter</code>	Filter Input	Filters records based on supported criteria. The supported property is <code>name</code> . The supported operators are: <ul style="list-style-type: none"> <code>eq</code> <code>in</code> <code>contains</code>—This value isn't applicable if the Use Indexed Data For Product Listing and Search toggle from the Product Discovery Settings page from Setup is enabled. 	Optional	60.0

Name	Type	Description	Required or Optional	Available Version
		If multiple criteria are specified, then the resultant criteria are combined by using the <code>and</code> operator.		
<code>includeCatalogDetails</code>	Boolean	Indicates whether to include catalog details in the response (<code>true</code>) or not (<code>false</code>).	Optional	61.0
<code>limit</code>	Integer	Number of items to include in the response. The default value is 10.	Optional	60.0
<code>offset</code>	Integer	Reserved for internal use.	Optional	60.0
<code>orderBy</code>	String[]	Sort order of the results, which is either ascending (<code>asc</code>) or descending order (<code>desc</code>). The default sort order is ascending order. The default value is <code>asc</code> . If the Use Indexed Data For Product Listing and Search toggle from the Product Discovery Settings page from Setup is enabled, then you can sort products by using name only.	Optional	60.0
<code>priceBookId</code>	String	ID of the price book to get the prices from. If this property isn't specified, then prices from the standard price book are fetched.	Required	60.0
<code>pricingProcedure</code>	String	API name of the custom pricing procedure that's used for the pricing process. If this property isn't specified, then the default pricing procedure is executed.	Optional	60.0
<code>productClassificationId</code>	String	ID of the product classification.	Optional	60.0
<code>qualificationProcedure</code>	String	API name of the custom qualification procedure that's used for the product qualification process. If this property isn't specified, then the default qualification procedure is executed.	Optional	60.0
<code>relatedObjectFilters</code>	Related Object Filter Input[]	Filter records based on supported criteria for related objects. The supported object is <code>ProductSpecificationRecType</code> . The supported property is <code>IsCommercial</code> .	Optional	60.0

Name	Type	Description	Required or Optional	Available Version
		The supported operator is <code>eq</code> . The supported values are <code>true</code> and <code>false</code> .		
<code>userContext</code>	User Context Input	User context details. For example, account ID or contact ID.	Optional	60.0

Products Search Input

Input representation of the request to search products.

JSON example

This example shows a sample request to search products by using a query.

```
{
  "query": {
    "textQuery": {
      "searchPhrase": "firstproduct"
    }
  },
  "catalogId": "0ZSxx000000001GAA",
  "categoryId": "0ZGT100000000q10AA",
  "correlationId": "9cbb9650-48c5-11ed-96d1-0afcf185843b",
  "limit": 10,
  "cursor": "MTAwMDAwMDAwNg==",
  "orderBy": ["name:asc", "id:desc"],
  "userContext": {
    "accountId": "001xx000000001AAA",
    "contactId": "003xx00000000D7AAI"
  },
  "additionalFields": {
    "Product2": {
      "fields": [
        "CustomField1__c",
        "CustomField2__c",
        "StandardField1"
      ]
    }
  }
}
```

This example shows a sample request to search products by using the `searchTerm` property.

```
{
  "searchTerm": "Laptop",
  "catalogId": "0ZSDU0000002Og64AE",
  "categoryId": "0ZGDU0000002P0A4AU",
  "correlationId": "d9d8f898-19f5-464a-ba2b-6a070783f6c4",
  "limit": 10,
  "cursor": "MTAwMDAwMDAwNw==",
  "orderBy": ["name:asc", "id:desc"],
}
```

```

    "userContext": {
      "accountId": "001DU000001o2V0YAI"
    }
  }

```

If a parent category ID is specified in the request body, then the API returns all products associated to all child categories.

Properties

Name	Type	Description	Required or Optional	Available Version
additional ContextData	Context Data Input []	Additional nodes that are added to the custom or default context definition. The maximum number of supported nodes is 10.	Optional	60.0
additional Fields	Map<String, Additional Fields Input >	Additional standard or custom fields of the Product2 object to include in the response. If the requested fields are invalid or access to fields isn't available, then the API throws an error.	Optional	61.0
catalogId	String	ID of the catalog. If the catalog ID is specified, then the API returns the list of offers from the catalog with the pricing details related to the catalog.	Optional	60.0
categoryId	String	ID of the category. If the category ID isn't specified, then the API returns the matching query offers from the catalog.	Optional	60.0
context Definition	String	API name of the custom context definition that's sent for context creation. If this property isn't specified, then the default context definition is used.	Optional	60.0
context Mapping	String	Default context mapping of the context definition. If a context mapping is specified, then the API checks whether the mapping belongs to the specified context definition to process the details for hydration.	Optional	60.0
correlationId	String	Unique identifier of the request.	Optional	60.0
currencyCode	String	Currency code that's considered for pricing and filtering request.	Optional	60.0
cursor	String	Unique ID to represent the position of each product in the dataset.	Optional	60.0

Name	Type	Description	Required or Optional	Available Version
enablePricing	Boolean	<p>Indicates whether to enable pricing for the products (<code>true</code>) or not (<code>false</code>). The default value is <code>true</code>.</p> <p>The Pricing Procedure toggle from the Product Discovery Settings page from Setup overrides this property. For example, if the Pricing Procedure toggle is disabled, then setting the <code>enablePricing</code> property to <code>true</code> has no effect and the <code>prices</code> property in the API response is returned empty.</p>	Optional	60.0
enableQualification	Boolean	<p>Indicates whether to enable qualification rules for the products (<code>true</code>) or not (<code>false</code>). The default value is <code>true</code>.</p> <p>The Qualification Procedure toggle from the Product Discovery Settings page from Setup overrides this property. For example, if the Qualification Procedure toggle is disabled, then setting the <code>enableQualification</code> property to <code>true</code> has no effect and the <code>qualificationContext</code> property in the API response isn't returned.</p>	Optional	60.0
filter	Filter Input	<p>Filters records based on supported criteria. The supported property is <code>name</code>.</p> <p>The supported operators are:</p> <ul style="list-style-type: none"> • <code>eq</code> • <code>in</code> • <code>contains</code> • <code>gt</code>—Specifies a greater than criteria. Available from API version 63.0 and later for Number, Date, and Datetime data types only. • <code>lt</code>—Specifies a less than criteria. Available from API version 63.0 and later for Number, Date, and Datetime data types only. • <code>gte</code>—Specifies a greater than or equal to criteria. Available from API version 63.0 and later for Number, Date, and Datetime data types only. 	Optional	60.0

Name	Type	Description	Required or Optional	Available Version
		<ul style="list-style-type: none"> <code>lte</code>—Specifies a less than or equal to criteria. Available from API version 63.0 and later for Number, Date, and Datetime data types only. <p>If multiple criteria are specified, then the resultant criteria are combined by using the <code>and</code> operator.</p>		
<code>includeCatalogDetails</code>	Boolean	Indicates whether to include catalog details in the response (<code>true</code>) or not (<code>false</code>).	Optional	61.0
<code>limit</code>	Integer	Number of items to include in the response. The default value is 10.	Optional	60.0
<code>offset</code>	Integer	Reserved for internal use.	Optional	60.0
<code>orderBy</code>	String[]	Sort order of the results, which is either ascending or descending order. The default sort order is ascending order. The default value is <code>asc</code> .	Optional	60.0
<code>priceBookId</code>	String	ID of the price book to get the prices from. If this property isn't specified, then prices from the standard price book are fetched.	Optional	60.0
<code>pricingProcedure</code>	String	API name of the custom pricing procedure that's used for the pricing process. If this property isn't specified, then the default pricing procedure is executed.	Optional	60.0
<code>productClassificationId</code>	String	ID of the product classification.	Optional	60.0
<code>qualificationProcedure</code>	String	API name of the custom qualification procedure that's used for the product qualification process. If this property isn't specified, then the default qualification procedure is executed.	Optional	60.0
<code>query</code>	Map<String, Object>>	Query to search the products.	Required	60.0
<code>relatedObjectFilter</code>	Related Object Filter Input []	Filter records based on supported criteria for related objects. The supported object is <code>ProductSpecificationRecType</code> .	Optional	60.0

Name	Type	Description	Required or Optional	Available Version
		The supported property is <code>IsCommerical</code> . The supported operator is <code>eq</code> . The supported values are <code>true</code> and <code>false</code> .		
<code>searchTerm</code>	String	String used to get products with the product name containing the search term. See Search Considerations When Using Indexed Data .	Optional	62.0
<code>userContext</code>	User Context Input	User context details. For example, account ID or contact ID.	Optional	60.0

QOC Qualification

Input representation of the qualification request.

JSON example

```
{
  "productIds": [
    "01txx0000006i7PAAQ",
    "01txx0000006i7QAAQ",
    "01txx0000006i7IAAQ"
  ],
  "userContext": {
    "accountId": "001xx000003GZHgAAO"
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
<code>additionalContextData</code>	Context Data Input []	Additional nodes that are added to the custom or default context definition. The maximum number of supported nodes is 10.	Optional	60.0
<code>catalogId</code>	String	ID of the catalog.	Optional	60.0
<code>categoryId</code>	String	ID of the category.	Optional	60.0
<code>contextDefinition</code>	String	API name of the custom context definition that's sent for context creation. If this property isn't specified, the default context definition is used.	Optional	60.0

Name	Type	Description	Required or Optional	Available Version
context Mapping	String	Default context mapping of the context definition. If a context mapping is specified, then the API checks whether the mapping belongs to the specified context definition to process the details for hydration.	Optional	60.0
correlationId	String	Unique identifier of the request.	Optional	60.0
productIds	String[]	List of product IDs for qualification check.	Required	60.0
qualification Procedure	String	API name of the custom qualification procedure that's sent for processing. If this property isn't specified, the default qualification procedure is executed.	Optional	60.0
userContext	User Context Input	User context details. For example, account ID or contact ID.	Optional	60.0

Related Object Filter Input

Input representation of the request to filter records of a related object.

JSON example

```
"relatedObjectFilters":
[
  {
    "objectName": "ProductSpecificationRecType",
    "criteria":
    [
      {
        "property": "IsCommercial",
        "operator": "eq",
        "value": true
      }
    ]
  }
]
```

Properties

Name	Type	Description	Required or Optional	Available Version
criteria	Filter Criteria Input []	Criteria to filter the related objects.	Required if the <code>relatedObjectFilters</code> property is specified.	60.0
objectName	String	Name of the object that's related to the main object.	Required if the <code>relatedObjectFilters</code> property is specified.	60.0

User Context Input

Input representation of the details with the user context.

JSON example

```
"userContext": {
  "accountId": "001xx0000000001AAA",
  "contactId": "003xx000000000D7AAI",
  "contextId": "e055bb18-d4e8-41c3-881e-0132b9561708"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
accountId	String	ID of the account in a user context.	Optional	60.0
contactId	String	ID of the contact in a user context.	Optional	60.0
contextId	String	ID of the context that represents the created session.	Optional	60.0

Response Bodies

Learn more about the available Product Discovery API response bodies.

[API Status](#)

Output representation of the API status.

[CPQ Base Bulk Details](#)

Output representation of the response that contains the details of multiple products.

[CPQ Base Details](#)

Output representation of the catalog, category, or product details based on the request.

[CPQ Base List](#)

Output representation of the list of catalogs, categories, or products based on the request.

[CPQ Message](#)

Output representation of the API messages.

[Facet Value](#)

Output representation of the facet values found in the search result.

[Guided Selection](#)

Output representation of the details of a guided selection.

[Guided Selection Search Term](#)

Output representation of the search term details for a guided selection.

[Search Products Facet](#)

Output representation of the details of the faceted search.

[User Context](#)

Output representation of the user context details.

API Status

Output representation of the API status.

Property Name	Type	Description	Filter Group and Version	Available Version
messages	CPQ Message[]	Status messages of the API execution.	Small, 60.0	60.0
statusCode	String	Status code of the API execution.	Small, 60.0	60.0
statusMessage	String	Display label for the API status.	Small, 60.0	60.0

CPQ Base Bulk Details

Output representation of the response that contains the details of multiple products.

JSON example

```
{
  "apiStatus": {
    "messages": [],
    "statusCode": "FetchedDetailsSuccessfully"
  },
  "contextId": "c68c7c7e85f3ea5b0e7bcfefc0f2dba9bbd24bfe2f4240ca589af50e473e2242",
  "correlationId": "de9a674c-1807-438c-ac78-2c96f4655325",
  "result": [
    {
      "additionalFields": [],
      "attributeCategories": [],
      "attributes": [],
      "catalogs": [],
      "childProducts": [],
      "id": "01txx0000006ivJAAQ",
      "isActive": true,
      "isAssetizable": true,
      "isSoldOnlyWithOtherProds": false,
      "name": "iPhone12",
      "nodeType": "simpleProduct",
      "prices": [
        {
          "currencyIsoCode": "USD",
          "isDefault": false,
          "isSelected": true,
          "price": 100,
          "priceBookEntryId": "01luxx0000008zUkAAI",
          "priceBookId": "01sxx0000005qxxAAA",
          "pricingModel": {
            "id": "0jPxx00000009hEAA",
            "name": "OneTime",
            "pricingModelType": "OneTime"
          }
        }
      ]
    }
  ]
}
```

```

    }
  },
  {
    "currencyIsoCode": "USD",
    "isDefault": true,
    "isSelected": false,
    "price": 15,
    "priceBookEntryId": "01uxx0000008zUmAAI",
    "priceBookId": "01sxx0000005qxxAAA",
    "pricingModel": {
      "frequency": "Months",
      "id": "0jPxx000000009iEAA",
      "name": "Monthly",
      "occurrence": 1,
      "pricingModelType": "TermDefined"
    }
  }
],
"productClassification": {},
"productCode": "iPhone12",
"productComponentGroups": [],
"productSellingModelOptions": [
  {
    "id": "0iOxx00000000EfeEAI",
    "productId": "01txx0000006ivJAAQ",
    "productSellingModel": {
      "id": "0jPxx000000009iEAA",
      "name": "Monthly",
      "pricingTerm": 1,
      "pricingTermUnit": "Months",
      "sellingModelType": "TermDefined",
      "status": "Active"
    },
    "productSellingModelId": "0jPxx000000009iEAA"
  },
  {
    "id": "0iOxx00000000EgEAI",
    "productId": "01txx0000006ivJAAQ",
    "productSellingModel": {
      "id": "0jPxx000000009hEAA",
      "name": "OneTime",
      "sellingModelType": "OneTime",
      "status": "Active"
    },
    "productSellingModelId": "0jPxx000000009hEAA"
  }
],
"productSpecificationType": {
  "name": "ProdSpecRecType1",
  "productSpecificationRecordType": {}
},
"qualificationContext": {
  "isQualified": true
}

```

```

},
{
  "additionalFields": [],
  "attributeCategories": [],
  "attributes": [],
  "catalogs": [],
  "childProducts": [],
  "id": "01txx0000006ivLAAQ",
  "isActive": true,
  "isAssetizable": true,
  "isSoldOnlyWithOtherProds": false,
  "name": "iPhone13",
  "nodeType": "simpleProduct",
  "prices": [
    {
      "currencyIsoCode": "USD",
      "isDefault": true,
      "isSelected": false,
      "price": 1520,
      "priceBookEntryId": "01luxx0000008zUpAAI",
      "priceBookId": "01sxx0000005qxxAAA",
      "pricingModel": {
        "id": "0jPxx000000009hEAA",
        "name": "OneTime",
        "pricingModelType": "OneTime"
      }
    }
  ],
  {
    "currencyIsoCode": "USD",
    "isDefault": false,
    "isSelected": false,
    "price": 152,
    "priceBookEntryId": "01luxx0000008zUqAAI",
    "priceBookId": "01sxx0000005qxxAAA",
    "pricingModel": {
      "frequency": "Months",
      "id": "0jPxx000000009iEAA",
      "name": "Monthly",
      "occurrence": 1,
      "pricingModelType": "TermDefined"
    }
  }
],
"productClassification": {},
"productCode": "iPhone13",
"productComponentGroups": [],
"productSellingModelOptions": [
  {
    "id": "0iOxx00000000EbEAI",
    "productId": "01txx0000006ivLAAQ",
    "productSellingModel": {
      "id": "0jPxx000000009iEAA",
      "name": "Monthly",
      "pricingTerm": 1,

```

```

        "pricingTermUnit": "Months",
        "sellingModelType": "TermDefined",
        "status": "Active"
    },
    "productSellingModelId": "0jPxx000000009iEAA"
},
{
    "id": "0iOxx00000000EeEAI",
    "productId": "01txx0000006ivLAAQ",
    "productSellingModel": {
        "id": "0jPxx000000009hEAA",
        "name": "OneTime",
        "sellingModelType": "OneTime",
        "status": "Active"
    },
    "productSellingModelId": "0jPxx000000009hEAA"
}
],
"productSpecificationType": {
    "name": "ProdSpecRecType1",
    "productSpecificationRecordType": {}
},
"qualificationContext": {
    "isQualified": true
}
}
]
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
apiStatus	API Status []	Status of the API request.	Small, 61.0	61.0
contextId	String	ID of the context.	Small, 61.0	61.0
correlationId	String	Unique identifier of the request.	Small, 61.0	61.0
result	Any response body	Result that contains the details of products.	Small, 61.0	61.0
userContext	User Context []	User context details. For example, account ID or contact ID.	Small, 61.0	61.0

CPQ Base Details

Output representation of the catalog, category, or product details based on the request.

JSON example

This example shows the sample catalog details.

```

{
  "apiStatus": {
    "messages": [
      ],

```

```

    "statusCode": "FetchedDetailsSuccessfully"
  },
  "correlationId": "32595ed6-1922-41f7-9c2c-373c677a7d62",
  "result": {
    "catalogCode": "Mobiles",
    "catalogType": "Sales",
    "description": "Catalog for mobile phones",
    "effectiveEndDate": "2028-04-01T19:00Z",
    "effectiveStartDate": "2024-04-01T19:00Z",
    "id": "0ZSxx000000001GAA",
    "name": "Mobiles",
    "numberOfCategories": 3
  }
}

```

This example shows the sample category details.

```

{
  "apiStatus": {
    "messages": [

    ],
    "statusCode": "FetchedDetailsSuccessfully"
  },
  "correlationId": "f9fb90de-36aa-44a1-9961-a9ef5fc0cad8",
  "result": {
    "catalogId": "0ZSxx000000001GAA",
    "childCategories": [

    ],
    "description": "Category for Samsung phones",
    "id": "0ZGxx000000004rGAA",
    "name": "Samsung",
    "isNavigational": true,
    "sortOrder": 2
  }
}

```

This example shows the sample product details.

```

{
  "apiStatus": {
    "messages": [

    ],
    "statusCode": "FetchedDetailsSuccessfully"
  },
  "correlationId": "822a8941-7412-4883-bb80-e488f908471e",
  "result": {
    "additionalFields": {
      "CustomField1__c": "TextValue",
      "CustomField2__c": "10",
      "StandardField1": "false"
    },
    "attributeCategories": [

```

```

],
"attributes": [

],
"catalogs": [

],
"childProducts": [

],
"id": "01txx0000006i2WAAQ",
"isActive": true,
"isAssetizable": true,
"isSoldOnlyWithOtherProds": false,
"name": "iPhone15",
"nodeType": "simpleProduct",
"prices": [

],
"productClassification": {

},
"productCode": "iPhone15",
"productComponentGroups": [

],
"productSellingModelOptions": [
  {
    "id": "0iOxx0000000003EAA",
    "productId": "01txx0000006i2WAAQ",
    "productSellingModel": {
      "id": "0jPxx0000000001EAA",
      "name": "OneTime",
      "sellingModelType": "OneTime",
      "status": "Active"
    },
    "productSellingModelId": "0jPxx0000000001EAA"
  },
  {
    "id": "0iOxx0000000004EAA",
    "productId": "01txx0000006i2WAAQ",
    "productSellingModel": {
      "id": "0jPxx0000000002EAA",
      "name": "Monthly",
      "pricingTerm": 1,
      "pricingTermUnit": "Months",
      "sellingModelType": "TermDefined",
      "status": "Active"
    },
    "productSellingModelId": "0jPxx0000000002EAA"
  }
],
"productSpecificationType": {

```

```

    "name": "ProdSpecRecType1",
    "productSpecificationRecordType": {
      }
    }
  }
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
apiStatus	API Status	Status of the API request.	Small, 60.0	60.0
contextId	String	ID of the context.	Small, 60.0	60.0
correlationId	String	Unique identifier of the request.	Small, 60.0	60.0
result	Any response body	Result that contains the details of catalogs, categories, or products as per the requested resource.	Small, 60.0	60.0
userContext	User Context	User context details. For example, account ID or contact ID.	Small, 60.0	60.0

CPQ Base List

Output representation of the list of catalogs, categories, or products based on the request.

JSON example

This example shows a sample catalog list.

```

{
  "apiStatus": {
    "messages": [
      ],
    "statusCode": "FetchedDetailsSuccessfully"
  },
  "correlationId": "9f417514-9587-4063-9e48-18a2cf2477c0",
  "limit": 10,
  "offset": 0,
  "query": {
  },
  "result": [
    {
      "catalogCode": "Mobiles",
      "catalogType": "Sales",
      "description": "Catalog for mobile phones",
      "effectiveEndDate": "2028-04-01T19:00Z",
      "effectiveStartDate": "2024-04-01T19:00Z",
      "id": "0ZSxx000000001GAA",
      "name": "Mobiles",
      "numberOfCategories": 3
    }
  ]
}

```



```

    }
  ],
  "total": 1
}

```

This example shows a sample category list.

```

{
  "apiStatus": {
    "messages": [

    ],
    "statusCode": "FetchedDetailsSuccessfully"
  },
  "correlationId": "3f2a8f45-e7d2-42ec-bc4c-b981d750e912",
  "query": {

  },
  "result": [
    {
      "catalogId": "0ZSxx0000000001GAA",
      "childCategories": [

      ],
      "description": "Category for Apple phones and iPads",
      "id": "0ZGxx0000000001GAA",
      "name": "Apple",
      "sortOrder": 1,
      "isNavigational": true
    },
    {
      "catalogId": "0ZSxx0000000001GAA",
      "childCategories": [

      ],
      "description": "Category for Samsung phones",
      "id": "0ZGxx0000000004rGAA",
      "name": "Samsung",
      "sortOrder": 2,
      "isNavigational": true
    },
    {
      "catalogId": "0ZSxx0000000001GAA",
      "childCategories": [

      ],
      "description": "Category for Android phones",
      "id": "0ZGxx0000000006TGAQ",
      "name": "Android",
      "isNavigational": true
    }
  ],
  "total": 3
}

```

This example shows a sample product list.

```
{
  "apiStatus": {
    "messages": [],
    "statusCode": "FetchedDetailsSuccessfully"
  },
  "contextId": "f36f8e73f1fc338cc4e93c61613cba07a6a0129941d97e5dd6e52a2885776ce4",
  "correlationId": "eeaa1db2-f371-4227-a886-c77e2f66ce1d",
  "cursor": "MTAwMDAwMDAwNg==",
  "query": {},
  "result": [
    {
      "additionalFields": {
        "DecompositionScope": "OrderLineItem",
        "ProductCode": "LPB001",
        "CanRamp": false
      },
      "attributeCategories": [],
      "catalogs": [
        {
          "customFields": {},
          "id": "0ZSDU0000002Og74AE",
          "name": "Service Catalog",
          "numberOfCategories": 5
        }
      ],
      "categories": [
        {
          "catalogId": "0ZSDU0000002Og74AE",
          "childCategories": [],
          "customFields": {},
          "hasSubCategories": false,
          "id": "0ZGDU0000002POH4AU",
          "name": "Cloud Services",
          "qualificationContext": {
            "isQualified": true
          }
        }
      ],
      "childProducts": [],
      "configureDuringSale": "Allowed",
      "description": "The laptop pro bundle includes a Laptop, mouse, warranty for 2
years, premium support and printer bundle",
      "displayUrl":
"https://encrypted-tbn0.gstatic.com/images?q=tbN:ANd9GcSCrGjPR1fvJqg4yP3RMycjI0H9eL6tk1fvzw&usqp=CAU",
      "id": "01tDU000000ExkZYAS",
      "isActive": true,
      "isAssetizable": true,
      "isSoldOnlyWithOtherProds": false,
      "name": "Laptop Pro Bundle",
      "nodeType": "bundleProduct",
      "prices": [],
      "productClassification": {}
    }
  ]
}
```

```

    "productCode": "LPB001",
    "productComponentGroups": [],
    "productSellingModelOptions": [
      {
        "id": "0iODU0000002TBN2A2",
        "productId": "01tDU000000ExkZYAS",
        "productSellingModel": {
          "id": "0jPDU0000002OTv2AM",
          "name": "One Time",
          "sellingModelType": "OneTime",
          "status": "Active"
        },
        "productSellingModelId": "0jPDU0000002OTv2AM"
      }
    ],
    "productSpecificationType": {
      "name": "Commercial",
      "productSpecificationRecordType": {}
    },
    "productType": "Bundle",
    "qualificationContext": {
      "isQualified": true
    }
  }
]
}

```

This example shows a sample of the list of products retrieved based on the Laptop search term.

```

{
  "apiStatus": {
    "messages": [],
    "statusCode": "FetchedDetailsSuccessfully"
  },
  "correlationId": "d9d8f898-19f5-464a-ba2b-6a070783f6c4",
  "cursor": "MTAwMDAwMDAwMw==",
  "facets": [
    {
      "attributeType": "ProductStandard",
      "displayName": "Product Type",
      "displayRank": 2,
      "nameOrId": "Type",
      "values": [
        {
          "displayName": "Bundle",
          "nameOrId": "Bundle"
        }
      ]
    },
    {
      "attributeType": "ProductDynamicAttribute",
      "displayName": "Display",
      "displayRank": 3,
      "nameOrId": "0tjDU0000003K5BYAU",
      "values": [

```

```
{
  "displayName": "1080p Built-in Display",
  "nameOrId": "1080p Built-in Display"
},
{
  "displayName": "2k Built-in Display",
  "nameOrId": "2k Built-in Display"
},
{
  "displayName": "4k Built-in Display",
  "nameOrId": "4k Built-in Display"
}
]
},
"limit": 10,
"query": {},
"result": [
  {
    "additionalFields": {},
    "attributeCategories": [],
    "catalogs": [],
    "categories": [
      {
        "catalogId": "0ZSDU00000020g64AE",
        "childCategories": [],
        "customFields": {},
        "hasSubCategories": false,
        "id": "0ZGDU0000002P0A4AU",
        "name": "Laptops",
        "qualificationContext": {
          "isQualified": true
        }
      }
    ],
    "configureDuringSale": "Allowed",
    "description": "Battery- or AC-powered personal computer (PC) smaller than a briefcase",
    "displayUrl": "https://aispoc.com/0Z88P0C?Hillstar-laptop-15-inch-white-aluminum-laptop-with-gps-usb-c-port-15-6-2k-amoled-2-in-1-65w-fast-charging-0218",
    "id": "01tDU000000ExkWYAS",
    "isActive": true,
    "isAssetizable": true,
    "isSoldOnlyWithOtherProds": false,
    "name": "Laptop",
    "nodeType": "simpleProduct",
    "prices": [],
    "productClassification": {
      "id": "11BDU0000002TCD2A2"
    },
    "productCode": "LP001",
    "productComponentGroups": [],
    "productSellingModelOptions": [
```

```

    {
      "id": "0iODU0000002TBF2A2",
      "productId": "01tDU000000ExkWYAS",
      "productSellingModel": {
        "id": "0jPDU0000002OTv2AM",
        "name": "One Time",
        "sellingModelType": "OneTime",
        "status": "Active"
      },
      "productSellingModelId": "0jPDU0000002OTv2AM"
    },
    "productSpecificationType": {
      "name": "Commercial",
      "productSpecificationRecordType": {}
    },
    "qualificationContext": {
      "isQualified": true
    }
  },
  {
    "additionalFields": {},
    "attributeCategories": [],
    "catalogs": [],
    "categories": [
      {
        "catalogId": "0ZSDU0000002Og64AE",
        "childCategories": [],
        "customFields": {},
        "hasSubCategories": false,
        "id": "0ZGDU0000002P0A4AU",
        "name": "Laptops",
        "qualificationContext": {
          "isQualified": true
        }
      }
    ],
    "configureDuringSale": "Allowed",
    "description": "The laptop basic bundle includes a Laptop, mouse, and warranty for 1 year.",
    "displayUrl":
    "https://encrypted-tbn0.gstatic.com/images?q=tbn:ANd9GcTbf49JG4zZogCmZMJuXU38qOkR9X36MN4bSw&usqp=CAU",

    "id": "01tDU000000ExkXYAS",
    "isActive": true,
    "isAssetizable": true,
    "isSoldOnlyWithOtherProds": false,
    "name": "Laptop Basic Bundle",
    "nodeType": "bundleProduct",
    "prices": [],
    "productClassification": {},
    "productCode": "LB001",
    "productComponentGroups": [],
    "productSellingModelOptions": [

```

```

    {
      "id": "0iODU0000002TBD2A2",
      "productId": "01tDU000000ExkXYAS",
      "productSellingModel": {
        "id": "0jPDU0000002OTv2AM",
        "name": "One Time",
        "sellingModelType": "OneTime",
        "status": "Active"
      },
      "productSellingModelId": "0jPDU0000002OTv2AM"
    },
    {
      "name": "Commercial",
      "productSpecificationRecordType": {}
    },
    "productType": "Bundle",
    "qualificationContext": {
      "isQualified": true
    }
  },
  {
    "additionalFields": {},
    "attributeCategories": [],
    "catalogs": [],
    "categories": [
      {
        "catalogId": "0ZSDU0000002Og64AE",
        "childCategories": [],
        "customFields": {},
        "hasSubCategories": false,
        "id": "0ZGDU0000002P0A4AU",
        "name": "Laptops",
        "qualificationContext": {
          "isQualified": true
        }
      }
    ],
    "configureDuringSale": "Allowed",
    "description": "The laptop pro bundle includes a Laptop, mouse, warranty for 2
years, premium support and printer bundle",
    "displayUrl":
"https://encrypted-tbn0.gstatic.com/images?q=tbn:ANd9GcSCrGjPR1fvJqg4yP3RMycjI0H9eL6tk1fvzw&usqp=CAU",

    "id": "01tDU000000ExkZYAS",
    "isActive": true,
    "isAssetizable": true,
    "isSoldOnlyWithOtherProds": false,
    "name": "Laptop Pro Bundle",
    "nodeType": "bundleProduct",
    "prices": [],
    "productClassification": {},
    "productCode": "LPB001",
    "productComponentGroups": [],

```

```

    "productSellingModelOptions": [
      {
        "id": "0iODU0000002TBN2A2",
        "productId": "01tDU000000ExkZYAS",
        "productSellingModel": {
          "id": "0jPDU0000002OTv2AM",
          "name": "One Time",
          "sellingModelType": "OneTime",
          "status": "Active"
        },
        "productSellingModelId": "0jPDU0000002OTv2AM"
      }
    ],
    "productSpecificationType": {
      "name": "Commercial",
      "productSpecificationRecordType": {}
    },
    "productType": "Bundle",
    "qualificationContext": {
      "isQualified": true
    }
  },
  {
    "additionalFields": {},
    "attributeCategories": [],
    "catalogs": [],
    "categories": [
      {
        "catalogId": "0ZSDU0000002Og64AE",
        "childCategories": [],
        "customFields": {},
        "hasSubCategories": false,
        "id": "0ZGDU0000002P0A4AU",
        "name": "Laptops",
        "qualificationContext": {
          "isQualified": true
        }
      }
    ]
  },
  "configureDuringSale": "Allowed",
  "description": "Laptop, Laptop Bag, Laptop stand, Mouse, Keyboard, USB-C
Hub, External Hard Drive, Noise Cancelling Headphones, office 365",
  "displayUrl": "https://m.media-amazon.com/images/I/613Fno-NLYL._AC_SL1000_.jpg",
  "id": "01tDU000000ExlAYAS",
  "isActive": true,
  "isAssetizable": true,
  "isSoldOnlyWithOtherProds": false,
  "name": "Laptop Productivity Bundle",
  "nodeType": "bundleProduct",
  "prices": [],
  "productClassification": {},
  "productCode": "LPB001",
  "productComponentGroups": [],
  "productSellingModelOptions": [

```

```

    {
      "id": "0iODU0000002TBq2AM",
      "productId": "01tDU000000ExlAYAS",
      "productSellingModel": {
        "id": "0jPDU0000002OTv2AM",
        "name": "One Time",
        "sellingModelType": "OneTime",
        "status": "Active"
      },
      "productSellingModelId": "0jPDU0000002OTv2AM"
    },
    "productSpecificationType": {
      "name": "Commercial",
      "productSpecificationRecordType": {}
    },
    "productType": "Bundle",
    "qualificationContext": {
      "isQualified": true
    }
  },
  "total": 4
}

```

This example shows a sample of the results of a qualification procedure that's executed on a list of product IDs.

```

{
  "apiStatus": {
    "messages": [

    ],
    "statusCode": "FetchedDetailsSuccessfully"
  },
  "contextId": "e055bb18-d4e8-41c3-881e-0132b9561708",
  "correlationId": "c280c1b0-fd3f-4eac-9b08-075bdf1cbefc",
  "query": {

  },
  "result": [
    {
      "productId": "01txx0000006i7PAAQ",
      "qualificationContext": {
        "isQualified": true
      }
    },
    {
      "productId": "01txx0000006i7QAAQ",
      "qualificationContext": {
        "isQualified": true
      }
    },
    {
      "productId": "01txx0000006i7IAAQ",
      "qualificationContext": {

```



```

        "isQualified": true
      }
    }
  ]
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
apiStatus	API Status	Status of the API request.	Small, 60.0	60.0
contextId	String	ID of the context.	Small, 60.0	60.0
correlationId	String	Unique ID of the request.	Small, 60.0	60.0
cursor	String	Unique ID to represent the position of each product in the dataset.	Small, 60.0	60.0
facets	Search Products Facet	Details of the faceted search.	Small, 63.0	63.0
limit	Integer	Number of items fetched in the response.	Small, 60.0	60.0
offset	Integer	Offset size from which the item count is fetched.	Small, 60.0	60.0
query	Map<String, Object>>	Query that was used for the search request.	Small, 60.0	60.0
result	Any response body	Result that contains the list of catalogs, categories, or products as per the requested resource.	Small, 60.0	60.0
total	Integer	Number of fetched records.	Small, 60.0	60.0
userContext	User Context	User context details. For example, account ID or contact ID.	Small, 60.0	60.0

CPQ Message

Output representation of the API messages.

Property Name	Type	Description	Filter Group and Version	Available Version
code	String	Code specifying the type of message. Valid value is <code>CartValidationError</code> .	Small, 60.0	60.0
detail	String	Required details other than the message text.	Small, 60.0	60.0
message	String	Text of the API message.	Small, 60.0	60.0

Property Name	Type	Description	Filter Group and Version	Available Version
severity	String	Severity of the API message. Valid values are: <ul style="list-style-type: none"> • Error • Info • Warning 	Small, 60.0	60.0

Facet Value

Output representation of the facet values found in the search result.

JSON example

```

"values": [
  {
    "displayName": "1080p Built-in Display",
    "nameOrId": "1080p Built-in Display"
  },
  {
    "displayName": "2k Built-in Display",
    "nameOrId": "2k Built-in Display"
  },
  {
    "displayName": "4k Built-in Display",
    "nameOrId": "4k Built-in Display"
  }
]

```

Property Name	Type	Description	Filter Group and Version	Available Version
displayName	String	Display name of the facet value.	Small, 63.0	63.0
nameOrId	String	ID or the internal name of the facet value.	Small, 63.0	63.0

Guided Selection

Output representation of the details of a guided selection.

JSON example

```

{
  "apiStatus": {
    "messages": [],
    "statusCode": "FETCHED_DETAILS_SUCCESSFULLY"
  },
  "correlationId": "corrId",
  "cursor": "MTAwMDAwMDAwNg==",
  "searchTerms": [

```

```

    {
      "term": "iPhone"
    },
    {
      "term": "4GB"
    },
    {
      "term": "64GB"
    }
  ],
  "result": [
    {
      "additionalFields": {
        "CustomField1__c": "TextValue",
        "CustomField2__c": "10",
        "StandardField1": "false"
      },
      "description": "iPhone-13",
      "id": "01txx0000006kYwAAI",
      "name": "Sample product 1",
      "prices": [
        {
          "price": 150,
          "priceBookEntryId": "12Axx0000004DF7EAM",
          "priceBookId": "01sxx0000005puLAAQ",
          "pricingModel": {
            "frequency": "Monthly",
            "id": "12Bxx0000000CiCDEA0",
            "name": "iPhone-13",
            "occurrence": 6,
            "pricingModelType": "Recurring"
          }
        },
        {
          "price": 400,
          "priceBookEntryId": "12Axx0000004DGjEAM",
          "priceBookId": "01sxx0000005puLAAQ",
          "pricingModel": {
            "id": "12Bxx0000000CiCCEA0",
            "name": "iPhone-13",
            "pricingModelType": "OneTime"
          }
        }
      ],
      "qualificationContext": {
        "isQualified": true
      }
    }
  ]
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
searchTerms	Guided Selection Search Term[]	Search terms for the guided selection.	Small, 62.0	62.0

Guided Selection Search Term

Output representation of the search term details for a guided selection.

JSON example

```
"searchTerms": [
  {
    "term": "iPhone"
  },
  {
    "term": "4GB"
  },
  {
    "term": "64GB"
  }
]
```

Property Name	Type	Description	Filter Group and Version	Available Version
term	String	Search term value for the guided selection.	Small, 62.0	62.0

Search Products Facet

Output representation of the details of the faceted search.

JSON example

```
"facets": [
  {
    "attributeType": "ProductStandard",
    "displayName": "Product Type",
    "displayRank": 2,
    "nameOrId": "Type",
    "values": [
      {
        "displayName": "Bundle",
        "nameOrId": "Bundle"
      }
    ]
  },
  {
    "attributeType": "ProductDynamicAttribute",
    "displayName": "Display",
    "displayRank": 3,
    "nameOrId": "0tjDU0000003K5BYAU",
  }
]
```

```

    "values": [
      {
        "displayName": "1080p Built-in Display",
        "nameOrId": "1080p Built-in Display"
      },
      {
        "displayName": "2k Built-in Display",
        "nameOrId": "2k Built-in Display"
      },
      {
        "displayName": "4k Built-in Display",
        "nameOrId": "4k Built-in Display"
      }
    ]
  }
]

```

Property Name	Type	Description	Filter Group and Version	Available Version
attributeType	String	Search attribute type of the facet.	Small, 63.0	63.0
displayName	String	Display name of the facet.	Small, 63.0	63.0
displayRank	Integer	Display rank for the facet.	Small, 63.0	63.0
nameOrId	String	ID or the internal name of the facet.	Small, 63.0	63.0
values	Facet Value[]	Values of the facet found in the search result. Sorted by display name in alphabetical order.	Medium, 63.0	63.0

User Context

Output representation of the user context details.

Property Name	Type	Description	Filter Group and Version	Available Version
contextId	String	ID of the context.	Small, 60.0	60.0

Product Discovery Standard Invocable Actions

Use the standard invocable actions available with Product Discovery to find and retrieve product, category, and catalog details. Additionally, execute a qualification procedure, and search products with guided selection.

[Find Products Action](#)

Search for the products from a catalog, category, or subcategory by using the specified search term.

[Execute Qualification Procedure Action](#)

Execute a qualification procedure, which returns the qualification status for the specified products.

[Get Catalogs Action](#)

Get a list of catalog records.

[Get Catalog Details Action](#)

Get details of a catalog record.

[Get Categories Action](#)

Get the list of categories associated with a catalog record.

[Get Category Details Action](#)

Get details of a category record.

[Get Multiple Product Details Action](#)

Get product details for a list of products.

[Get Products Action](#)

Get products from the specified catalog, category, or subcategory, including product qualification and pricing details.

[Get Product Details Action](#)

Get details such as attributes, hierarchy, and cardinality for the specified product.

[Search Product with Guided Selection Action](#)

Use guided product selection to search for products.

Find Products Action

Search for the products from a catalog, category, or subcategory by using the specified search term.

This action is available in API version 62.0 and later.

Special Access Rules

The Find Products action is available in Enterprise, Unlimited, and Developer Editions where Product Discovery is enabled.

Supported REST HTTP Methods

URI

```
/services/data/v65.0/actions/standard/findProducts
```

Formats

JSON, XML

HTTP Methods

POST

Authentication

Authorization: Bearer *token*

Inputs

Input	Details
additionalContextData	Type Apex-defined

Input**Details****Description**

An array of Apex `runtime_industries_cpq.AdditionalContextData` records that contain the additional nodes that are used along with the context definition nodes for data hydration.

The maximum number of supported nodes is 10.

additionalFields

Type

Apex-defined

Description

An Apex `runtime_industries_cpq.AdditionalFields` record that contains an array of additional standard or custom fields to include in the response.

The supported objects are:

- `Product2`
- `ProductAttributeDefinition`—If the fields defined for the `ProductAttributeDefinition` object aren't available for the `ProductClassificationAttr` object, then the API request fails.

catalogId

Type

string

Description

Catalog ID that's used to find and retrieve the products.

categoryId

Type

string

Description

ID of the category or subcategory to get the products for.

contextDefinition

Type

string

Description

API name of the context definition used for context creation. If you don't specify a value, the context selected on the Product Discovery Settings page from Setup is used.

contextMapping

Type

string

Description

API name of the context mapping that's used for data hydration. The value of this parameter is used only if it belongs to the specified context definition.

Input	Details
correlationId	<p>Type</p> <p>string</p> <p>Description</p> <p>Currency code that's used to calculate and show prices. Only the products with the currency code matching the specified currency code are fetched.</p>
currencyCode	<p>Type</p> <p>string</p> <p>Description</p> <p>Currency code that's used to calculate and show prices.</p>
cursor	<p>Type</p> <p>string</p> <p>Description</p> <p>A unique identifier that represents the position of the product from which the next set of results are retrieved.</p>
enablePricing	<p>Type</p> <p>boolean</p> <p>Description</p> <p>Indicates whether the pricing procedure must run (<code>true</code>) or not (<code>false</code>).</p> <p>The default value is <code>true</code>. To use this parameter, you must enable the Pricing Procedure setting from Setup.</p>
enableQualification	<p>Type</p> <p>boolean</p> <p>Description</p> <p>Indicates whether the qualification procedure must run (<code>true</code>) or not (<code>false</code>).</p> <p>The default value is <code>true</code>. To use this parameter, you must enable the Qualification Procedure setting from Setup.</p>
filter	<p>Type</p> <p>Apex-defined</p> <p>Description</p> <p>A collection of Apex <code>runtime_industries_cpq.FilterInputRepresentation</code> records where each record contains a related object and the filter criteria that's applied on the object.</p> <p>The <code>filter</code> parameter supports only the <code>name</code> property.</p>

Input	Details
	<p>The supported operators are:</p> <ul style="list-style-type: none">• eq• in• contains <p>If this parameter contains multiple criteria, all the criteria are applied.</p>
includeCatalogDetails	<p>Type boolean</p> <p>Description Indicates whether catalog details must be included in the response (<code>true</code>) or not (<code>false</code>).</p>
limit	<p>Type integer</p> <p>Description Maximum number of results to be returned in the response. Enter a value from 1 through 100. The default value is 10.</p>
orderBy	<p>Type string</p> <p>Description Comma-separated string of key-value pairs that specify how results are sorted. Each string must contain a field name and its sort order. For example, <code>["name:asc","custom_field:asc"]</code>.</p>
priceBookId	<p>Type string</p> <p>Description ID of the pricebook from which you wan to retrieve the pricing details.</p>
productClassificationId	<p>Type string</p> <p>Description ID of the product classification that's used to filter products.</p>
pricingProcedure	<p>Type string</p> <p>Description API name of the pricing procedure to calculate product prices. If you don't specify a value, the pricing procedure selected on the Product Discovery Settings page from Setup is used.</p>

Input	Details
qualificationProcedure	<p>Type</p> <p>string</p> <p>Description</p> <p>API name of the qualification procedure to evaluate product eligibility. If you don't specify a value, the qualification procedure selected on the Product Discovery Settings page from Setup is used.</p>
relatedObjectFilters	<p>Type</p> <p>Apex-defined</p> <p>Description</p> <p>A collection of Apex <code>runtime_industries_cpq.RelatedObjectFilterInputRepresentation</code> records, where each record contains a related object and the filter criteria that's applied on the object.</p>
searchTerm	<p>Type</p> <p>string</p> <p>Description</p> <p>Required.</p> <p>Search term to find and retrieve products.</p>
userContext	<p>Type</p> <p>Apex-defined</p> <p>Description</p> <p>An Apex <code>ConnectApi.UserContextInputRepresentation</code> record that contains the user details to evaluate product eligibility and calculate prices.</p>

Outputs

Output	Details
apiStatus	<p>Type</p> <p>Apex-defined</p> <p>Description</p> <p>An Apex <code>runtime_industries_cpq.ApiStatusRepresentation</code> record that contains a status code and message.</p>
contextId	<p>Type</p> <p>string</p>

Output	Details
	<p>Description</p> <p>ID of the context that's created by using the specified context definition.</p>
correlationId	<p>Type</p> <p>string</p> <p>Description</p> <p>ID to reference a series of related actions.</p>
cursor	<p>Type</p> <p>string</p> <p>Description</p> <p>Unique identifier that represents the position of the next product in the dataset. It's used as an input to retrieve the next set of products.</p>
facets	<p>Type</p> <p>Apex-defined</p> <p>Description</p> <p>Collection of Apex ProductFacetsRepresentation records that contain details of the facet that's retrieved.</p>
results	<p>Type</p> <p>Apex-defined</p> <p>Description</p> <p>An Apex <code>runtime_industries_cpq.SearchProductsRepresentation</code> record that contains the products that match the query.</p>
userContext	<p>Type</p> <p>Apex-defined</p> <p>Description</p> <p>An Apex <code>ConnectApi.UserContextRepresentation</code> record that includes the user details.</p>

Example

POST

This sample request is for the Find Products action.

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

```

{
  "searchTerm": "firstproduct",
  "additionalContextData": [
    {
      "nodeName": "Contract",
      "nodeData": {
        "id": "xxxxxx231",
        "name": "Contract1"
      }
    },
    {
      "nodeName": "Lead",
      "nodeData": {
        "id": "l111111131",
        "name": "Lead1"
      }
    }
  ],
  "additionalFields": {
    "Product2": {
      "fields": [
        "CustomField1__c",
        "StandardField1"
      ]
    }
  },
  "correlationId": "9cbb9650-48c5-11ed-96d1-0afcf185843b",
  "catalogId": "0ZSxx0000000001GAA",
  "categoryId": "0ZGxx0000000004TAJ",
  "currencyCode": "USD",
  "priceBookId": "01sxx0000005puLAAQ",
  "productClassificationId": "11BRO0000000222AA",
  "limit": 10,
  "cursor": "MTAwMDAwMDAwNg==",
  "orderBy": [
    "name:asc"
  ],
  "userContext": {
    "accountId": "001xx0000000001AAA"
  },
  "enableQualification": true,
  "enablePricing": true,
  "qualificationProcedure": "QualificationProcedure",
  "pricingProcedure": "Preview",
  "contextDefinition": "TestDefinition",
  "contextMapping": "TestDefinitionNode",
  "includeCatalogDetails": false,
  "filter": {
    "criteria": [
      {
        "property": "name",
        "operator": "eq",
        "value": "Catalog_Name_1"
      }
    ]
  }
}

```

```

    ]
  },
  "relatedObjectFilters": [
    {
      "objectName": "ProductSpecificationRecType",
      "criteria": [
        {
          "property": "IsCommercial",
          "operator": "eq",
          "value": true
        }
      ]
    }
  ]
}

```

This is the sample response for the Find Products action.

```

{
  "apiStatus": {
    "messages": [],
    "statusCode": "FETCHED_DETAILS_SUCCESSFULLY"
  },
  "contextId": "0U3RM00000000SR0AY",
  "correlationId": "9cbb9650-48c5-11ed-96d1-0afcf185843b",
  "cursor": "MTAwMDAwMDAwNg==",
  "result": [
    {
      "additionalFields": {
        "CustomField1__c": "TextValue",
        "CustomField2__c": "10",
        "StandardField1": "false"
      },
      "description": "iPhone-13",
      "id": "01txx0000006kYwAAI",
      "name": "Sample product 1",
      "prices": [
        {
          "price": 150,
          "priceBookEntryId": "12Axx0000004DF7EAM",
          "priceBookId": "01sxx0000005puLAAQ",
          "pricingModel": {
            "frequency": "Monthly",
            "id": "12Bxx000000CicDEA0",
            "name": "iPhone-13",
            "occurrence": 6,
            "pricingModelType": "Recurring"
          }
        }
      ],
      {
        "price": 400,
        "priceBookEntryId": "12Axx0000004DGjEAM",
        "priceBookId": "01sxx0000005puLAAQ",

```

```

        "pricingModel": {
            "id": "12Bxx000000CiCCEA0",
            "name": "IPhone-13",
            "pricingModelType": "OneTime"
        }
    },
    "qualificationContext": {
        "isQualified": true
    }
},
{
    "additionalFields": {
        "CustomField1__c": "TextValue",
        "CustomField2__c": "10",
        "StandardField1": "false"
    },
    "description": "Sample product 2",
    "name": "Sample product 2",
    "id": "01txx0000006kYwAAI",
    "prices": [],
    "qualificationContext": {
        "isQualified": false
    }
},
{
    "description": "Sample product 3",
    "name": "Sample product 3",
    "id": "01txx0000006kYwAAI",
    "prices": [],
    "qualificationContext": {
        "isQualified": true
    }
}
],
"userContext": {
    "accountId": "001xx0000000001AAA"
}
}

```

Usage of an Apex-Defined Data Type in a Flow

To use an Apex-defined input parameter in a flow, follow these guidelines.

Create an Apex Class

Create an Apex class defining the input and output parameters. In the flow, include the Apex-defined input parameters for which you want to add the details. In this example, we've created a class named `ProductServiceAction` that takes an object's API name and record ID as input, and returns the additional context data.

```

public class ProductServiceAction {
    // Define input parameters
    public class FlowInput{
        @InvocableVariable(required=false)
        public String objectApiName;
    }
}

```

```

        @InvocableVariable(required=false)
        public String recordId;
    }

    // Define output parameters
    public class FlowOutput{
        @invocableVariable
        public runtime_industries_cpq.AdditionalContextData
additionalContextDataFinalOutput = new runtime_industries_cpq.AdditionalContextData();
    }

    // This method is invoked from a Flow
    @InvocableMethod(label='Process Input' description='Creates the Array of
ContextDataInput for additional Context Data')
    public static List<FlowOutput> processContextData(List<FlowInput> inputs){
        String apiName;
        String recId;
        FlowOutput output = new FlowOutput();

    // Capture input from the flow
        for(FlowInput input: inputs){
            apiName = input.objectApiName;
            recId = input.recordId;
        }

    // Populate the ContextDataInput list to store additional context data
        List<runtime_industries_cpq.ContextDataInput> listContextData = new
List<runtime_industries_cpq.ContextDataInput>();
        runtime_industries_cpq.ContextDataInput cd1 = new
runtime_industries_cpq.ContextDataInput();
        cd1.nodeName = apiName;
        cd1.nodeData = new Map<String, Object>();
        cd1.nodeData.put('id', recId);
        listContextData.add(cd1);

        output.additionalContextDataFinalOutput.additionalContextData = listContextData;

        List<FlowOutput> flowOutputs = new List<FlowOutput>();
        flowOutputs.add(output);

        List<runtime_industries_cpq.RelatedObjectFilter> relatedObjectFilterList = new
List<runtime_industries_cpq.RelatedObjectFilter>();

        runtime_industries_cpq.RelatedObjectFilter relatedObjectFilter = new
runtime_industries_cpq.RelatedObjectFilter();

        relatedObjectFilter.objectName = 'ProductSpecificationRecType';
        List<runtime_industries_cpq.FilterCriteriaInputRepresentation> criteriaList =
new List<runtime_industries_cpq.FilterCriteriaInputRepresentation>();
        runtime_industries_cpq.FilterCriteriaInputRepresentation criteria = new
runtime_industries_cpq.FilterCriteriaInputRepresentation();
        criteria.property = 'IsCommercial';
        criteria.operator = 'eq';
        criteria.value = 'true';
    }
}

```

```

        criteriaList.add(criteria);
        relatedObjectFilter.criteria = criteriaList;

        relatedObjectFilterList.add(relatedObjectFilter);
        output.relatedObjectFilter.relatedObjectFilter = relatedObjectFilterList;

        output.userContext.accountId = '001DU000001nx9BYAQ';

        return flowOutputs;
    }
}

```

Create a Flow with the Necessary Variables and Components

Create a flow that enables users to add a search term to find products. Add the ProductService action that you've created above by using Apex. When a flow is invoked from a record, the flow sends the record's objectApiName and recordId to the Apex class, which then generates the flow output. The flow passes the objectApiName and recordId of the record that the flow is invoked from to the Apex class to generate the flow output. See [Example of How to Create a Flow for Product Discovery](#).

Configure the Action

Configure the action (for example, Find Products action) to add values for the Apex-defined input parameters. Use the output of the created Apex class as the input of the Apex-defined parameter in the Find Products action, which users can use to find products.

Execute Qualification Procedure Action

Execute a qualification procedure, which returns the qualification status for the specified products.

This action is available in API version 64.0 and later.

Special Access Rules

The Execute Qualification Procedure action is available in Enterprise, Unlimited, and Developer Editions where Product Discovery is enabled.

Supported REST HTTP Methods

URI

`/services/data/v65.0/actions/standard/executeQualificationProcedure`

Formats

JSON, XML

HTTP Methods

POST

Authentication

Authorization: Bearer *token*

Inputs

Input	Details
additionalContextData	<p>Type</p> <p>Apex-defined</p> <p>Description</p> <p>Collection of Apex AdditionalContextData records that contain additional context data for nodes of the custom context definition, if applicable. You can add details for up to 10 nodes.</p>
contextDefinitionName	<p>Type</p> <p>string</p> <p>Description</p> <p>Name of the custom context definition that's used to create context data for categories. If null, the default context definition is used.</p>
contextMappingName	<p>Type</p> <p>string</p> <p>Description</p> <p>Name of the context mapping. By default, the default context mapping associated with the context definition is used.</p>
correlationId	<p>Type</p> <p>string</p> <p>Description</p> <p>Unique identifier attached to requests and messages, allowing reference to a specific transaction or event chain.</p>
productIds	<p>Type</p> <p>string</p> <p>Description</p> <p>Required.</p> <p>Collection of IDs of products that are to be checked for qualification.</p>
qualificationProcedureName	<p>Type</p> <p>string</p> <p>Description</p> <p>Name of the custom qualification procedure that's executed to determine the category list. If null, the default qualification procedure is executed.</p>
userContextInputRepresentation	<p>Type</p> <p>Apex-defined</p>

Input**Details****Description**

An Apex UserContextInputRepresentation record that contains user details, such as account ID, geographical location, language preferences, and more.

Outputs**Output****Details**

apiStatusOutputRepresentation

Type

Apex-defined

Description

An Apex ApiStatusOutputRepresentation record that contains the status of the request, including the status code and message.

contextId

Type

string

Description

ID of the context that's created by using the specified context definition.

correlationId

Type

string

Description

Unique identifier attached to requests and messages, allowing reference to a specific transaction or event chain.

qualificationResultRepresentations

Type

Apex-defined

Description

Collection of Apex QualificationResultRepresentation records that contain details about the qualified product.

Example**POST**

Here's a sample input to call this invocable action.

```
{
  "inputs": [
    {
      "correlationId": "9cbb9650-48c5-11ed-96d1-0afcf185843b",
      "additionalContextData": [
        {
```

```

        "nodeName": "Quote__c",
        "nodeData": {
            "id": "0Q0xx0000004CDsCAM",
            "businessObjectType": "Quote"
        }
    },
    "contextDefinitionName": "CategoryCD",
    "contextMappingName": "ProductDiscoveryMapping",
    "qualificationProcedureName": "CatQual02",
    "userContextInputRepresentation": {
        "accountId": "001xx000003GYiEAAW"
    }
}
]
}

```

Here's a sample input to call this invocable action from Apex code.

```

Invocable.Action action =
Invocable.Action.createStandardAction('executeQualificationProcedure');

ConnectApi.UserContextInputRepresentation userContext = new
ConnectApi.UserContextInputRepresentation();
userContext.accountId = '001xx000003GYiEAAW';

runtime_industries_cpq.ContextDataInput data = new
runtime_industries_cpq.ContextDataInput();
String nodeNameVal = 'Quote__c';
Map<String, Object> nodeDataVal = new Map<String, Object>();
nodeDataVal.put('id', (Object) '0Q0xx0000004CDsCAM');
nodeDataVal.put('businessObjectType', (Object) 'Quote');
data.nodeName = nodeNameVal;
data.nodeData = nodeDataVal;
List<runtime_industries_cpq.ContextDataInput> contextData= new
List<runtime_industries_cpq.ContextDataInput>();
contextData.add(data);
runtime_industries_cpq.AdditionalContextData additionalContextDataOut = new
runtime_industries_cpq.AdditionalContextData();
additionalContextDataOut.additionalContextData = new
List<runtime_industries_cpq.ContextDataInput>();
additionalContextDataOut.additionalContextData.add(data);

List<String> productIds = new List<String>();
prodIds.add('01ttx0000006i2ZAAQ');
prodIds.add('01ttx0000006i35AAA');
action2.setInvocationParameter('productIds', productIds);
action.setInvocationParameter('correlationId', '9cbb9650-48c5-11ed-96d1-0afcf185843b');
action.setInvocationParameter('userContextInputRepresentation', userContext);
action.setInvocationParameter('qualificationProcedureName', 'CatQual02');
action.setInvocationParameter('contextDefinitionName', 'CategoryCD');
action.setInvocationParameter('contextMappingName', 'ProductDiscoveryMapping');
action.setInvocationParameter('additionalContextData', additionalContextDataOut);

```

```
List<Invocable.Action.Result> results = action.invoke();
System.debug('Execute Qualification Procedure Action + '+results);
```

Here's a sample response when you call this action.

```
[
  {
    "actionName": "executeQualificationProcedure",
    "errors": null,
    "invocationId": null,
    "isSuccess": true,
    "outcome": null,
    "outputValues": {
      "apiStatusOutputRepresentation": {
        "statusMessage": null,
        "statusCode": "FetchedDetailsSuccessfully",
        "messages": []
      },
      "qualificationResultRepresentations": [
        {
          "qualificationContext": {
            "reason": null,
            "isQualified": true
          },
          "productId": "01tSG000007uDL8YAM"
        },
        {
          "qualificationContext": {
            "reason": "Product is not qualified because one or more field(s) do not
match the qualification criteria. Fields:- ProductId - 01tSG000007uDLBYA2
Max_Number_of_Employees - 50 Min_Number_of_Employees - 50 RootProductId - ",
            "isQualified": false
          },
          "productId": "01tSG000007uDLBYA2"
        }
      ],
      "correlationId": "9cbb9650-48c5-11ed-96d1-0afcf185843b",
      "contextId": "0000000b28op21g00251747224654739cade16577eac4c8fb5d94a20d952fdab"
    },
    "sortOrder": -1,
    "version": 1
  }
]
```

Get Catalogs Action

Get a list of catalog records.

This action is available in API version 64.0 and later.

Special Access Rules

Supported REST HTTP Methods

URI

/services/data/v**65.0**/actions/standard/getCatalogs

Formats

JSON, XML

HTTP Methods

POST

Authentication

Authorization: Bearer *token*

Inputs

Input	Details
recordLimit	<p>Type</p> <p>integer</p> <p>Description</p> <p>Number of catalog records to get. The minimum is 1, the maximum is 100, and the default is 100.</p>
recordOffset	<p>Type</p> <p>integer</p> <p>Description</p> <p>Number of catalog records to skip in the request. The default is 0.</p>
correlationId	<p>Type</p> <p>string</p> <p>Description</p> <p>Unique identifier for tracking requests and messages, allowing reference to a specific transaction or event chain.</p>
orderBy	<p>Type</p> <p>string</p> <p>Description</p> <p>Sort records in ascending or descending order.</p>

Outputs

Output	Details
resultCatalogList	<p>Type Apex-defined</p> <p>Description List of filtered catalog records.</p>
apiStatusOutputRepresentation	<p>Type Apex-defined</p> <p>Description An Apex ApiStatusOutputRepresentation record that contains the status of the request, including the status code and message.</p>
recordLimit	<p>Type integer</p> <p>Description Number of catalog records to show per page.</p>
resultListCount	<p>Type integer</p> <p>Description Number of catalog records in the result.</p>
correlationId	<p>Type string</p> <p>Description Unique identifier for tracking requests and messages, allowing reference to a specific transaction or event chain.</p>
recordOffset	<p>Type integer</p> <p>Description Number of catalog records to skip in the request. The default is 0.</p>

Example

POST

Here's a sample input to call this invocable action.

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

```

    {
      "correlationId": "9cbb9650-48c5-11ed-96d1-0afcf185843b",
      "recordLimit": 2,
      "recordOffset": 0,
      "orderBy": [
        "Name:ASC"
      ]
    }
  ]
}

```

Here's a sample input to call this invocable action from Apex code.

```

Invocable.Action action = Invocable.Action.createStandardAction('getCatalogs');

action.setInvocationParameter('correlationId', '9cbb9650-48c5-11ed-96d1-0afcf185843b');
action.setInvocationParameter('recordLimit', 1);
action.setInvocationParameter('recordOffset', 1);
String[] sortOrder = new String[]{'Name:ASC'};
action.setInvocationParameter('orderBy', sortOrder);

List<Invocable.Action.Result> results = action.invoke();
System.debug('Catalog List Action + '+results);

```

Here's a sample response when you call this action.

```

[
  {
    "actionName": "getCatalogs",
    "errors": null,
    "invocationId": null,
    "isSuccess": true,
    "outcome": null,
    "outputValues": {
      "resultListCount": 2,
      "apiStatusOutputRepresentation": {
        "statusMessage": null,
        "statusCode": "FetchedDetailsSuccessfully",
        "messages": []
      },
    },
    "resultCatalogList": [
      {
        "status": null,
        "numberOfCategories": 2,
        "name": "Hardware Catalog",
        "id": "0ZSZ6000000CtXYOA0",
        "effectiveStartDate": null,
        "effectiveEndDate": null,
        "description": "Hardware Catalog Desc",
        "customFields": [],
        "catalogType": "Sales",
        "catalogCode": "HC"
      }
    ],
    "correlationId": "9cbb9650-48c5-11ed-96d1-0afcf185843b",
  }
]

```

```

    "recordOffset": 0,
    "recordLimit": 1
  },
  "sortOrder": -1,
  "version": 1
}
]

```

Get Catalog Details Action

Get details of a catalog record.

This action is available in API version 64.0 and later.

Special Access Rules

The Get Catalog Details action is available in Enterprise, Unlimited, and Developer Editions where Product Discovery is enabled.

Supported REST HTTP Methods

URI

/services/data/v**65.0**/actions/standard/getCatalogDetails

Formats

JSON, XML

HTTP Methods

POST

Authentication

Authorization: Bearer *token*

Inputs

Input	Details
catalogId	<p>Type</p> <p>string</p> <p>Description</p> <p>Required.</p> <p>ID of the catalog record.</p>
correlationId	<p>Type</p> <p>string</p> <p>Description</p> <p>Unique identifier attached to requests and messages, enabling reference to a specific transaction or event chain.</p>

Outputs

Output	Details
apiStatusOutputRepresentation	<p>Type</p> <p>Apex-defined</p> <p>Description</p> <p>An Apex ApiStatusOutputRepresentation record that contains the status of the request, including the status code and message.</p>
catalogDetailsResult	<p>Type</p> <p>Apex-defined</p> <p>Description</p> <p>Details of the catalog record.</p>
correlationId	<p>Type</p> <p>string</p> <p>Description</p> <p>Unique identifier attached to requests and messages, allowing reference to a specific transaction or event chain.</p>

Example

POST

Here's a sample input to call this invocable action.

```
{
  "inputs": [
    {
      "correlationId": "9cbb9650-48c5-11ed-96d1-0afcf185843b",
      "catalogId": "0ZSZ6000000CtXYOA0"
    }
  ]
}
```

Here's a sample input to call this invocable action from Apex code.

```
Invocable.Action action = Invocable.Action.createStandardAction('getCatalogDetails');
action.setInvocationParameter('correlationId', '9cbb9650-48c5-11ed-96d1-0afcf185843b');
action.setInvocationParameter('catalogId', '0ZSZ6000000CtXYOA0');

List<Invocable.Action.Result> results = action.invoke();
System.debug('Catalog Details Action + '+results);
```

Here's a sample response when you call this action.

```
[
  {
```

```

    "actionName": "getCatalogDetails",
    "errors": null,
    "invocationId": null,
    "isSuccess": true,
    "outcome": null,
    "outputValues": {
      "apiStatusOutputRepresentation": {
        "statusMessage": null,
        "statusCode": "FetchedDetailsSuccessfully",
        "messages": []
      },
      "correlationId": "9cbb9650-48c5-11ed-96d1-0afcf185843b",
      "catalogDetailsResult": {
        "status": null,
        "numberOfCategories": 2,
        "name": "Hardware Catalog",
        "id": "0ZSZ6000000CtXYOA0",
        "effectiveStartDate": null,
        "effectiveEndDate": null,
        "description": "Hardware Catalog Desc",
        "customFields": null,
        "catalogType": "Sales",
        "catalogCode": "HC"
      }
    },
    "sortOrder": -1,
    "version": 1
  }
]

```

Get Categories Action

Get the list of categories associated with a catalog record.

This action is available in API version 64.0 and later.

Special Access Rules

The Get Categories action is available in Enterprise, Unlimited, and Developer Editions where Product Discovery is enabled.

Supported REST HTTP Methods

URI

/services/data/v**65.0**/actions/standard/getCategories

Formats

JSON, XML

HTTP Methods

POST

Authentication

Authorization: Bearer *token*

Inputs

Input	Details
additionalContextData	<p>Type</p> <p>Apex-defined</p> <p>Description</p> <p>Collection of Apex AdditionalContextData records that contain additional context data for nodes of the custom context definition, if applicable. You can add details for up to 10 nodes.</p>
catalogId	<p>Type</p> <p>string</p> <p>Description</p> <p>Required.</p> <p>ID of the catalog record.</p>
categoryNestLevel	<p>Type</p> <p>integer</p> <p>Description</p> <p>Level of nesting within the category hierarchy to include in the request.</p>
contextDefinitionName	<p>Type</p> <p>string</p> <p>Description</p> <p>Name of the custom context definition that's used to create context data for categories. If null, the default context definition is used.</p>
correlationId	<p>Type</p> <p>string</p> <p>Description</p> <p>Unique identifier attached to requests and messages, allowing reference to a specific transaction or event chain.</p>
contextMappingName	<p>Type</p> <p>string</p> <p>Description</p> <p>Name of the context mapping. By default, the default context mapping associated with the context definition is used.</p>
enableQualificationProcedure	<p>Type</p> <p>boolean</p>

Input**Details**

	Description
	Indicates whether qualification rules are applied to categories (<code>true</code>) or not (<code>false</code>).
<code>filterInputRepresentation</code>	Type Apex-defined Description Collection of Apex FilterInputRepresentation records that contain the filter criteria applied to the category records.
<code>parentCategoryId</code>	Type string Description ID of the parent category record.
<code>qualificationProcedureName</code>	Type string Description Name of the custom qualification procedure that's executed to determine the category list. If null, the default qualification procedure is executed.
<code>userContextInputRepresentation</code>	Type Apex-defined Description An Apex UserContextInputRepresentation record that contains user details, such as account ID, geographical location, language preferences, and more.

Outputs**Output****Details**

<code>apiStatusOutputRepresentation</code>	Type Apex-defined Description An Apex ApiStatusOutputRepresentation record that contains the status of the request, including the status code and message.
<code>correlationId</code>	Type string

Output	Details
	<p>Description</p> <p>Unique identifier attached to requests and messages, allowing reference to a specific transaction or event chain.</p>
resultCategoryList	<p>Type</p> <p>Apex-defined</p> <p>Description</p> <p>List of filtered category records.</p>
resultListCount	<p>Type</p> <p>integer</p> <p>Description</p> <p>Number of category records in the result.</p>

Example

POST

Here's a sample input to call this invocable action.

```
{
  "inputs": [
    {
      "catalogId": "0ZSxx000000002GAA",
      "correlationId": "9cbb9650-48c5-11ed-96d1-0afcf185843b",
      "additionalContextData": [
        {
          "nodeName": "Quote__c",
          "nodeData": {
            "id": "0Q0xx0000004CDsCAM",
            "businessObjectType": "Quote"
          }
        }
      ],
      "contextDefinitionName": "CategoryCD",
      "contextMappingName": "ProductDiscoveryMapping",
      "EnableQualificationProcedure": true,
      "QualificationProcedureName": "CatQual02",
      "userContextInputRepresentation": {
        "accountId": "001xx000003GYiEAAW"
      }
    }
  ]
}
```

Here's a sample input to call this invocable action from Apex code.

```

Invocable.Action action = Invocable.Action.createStandardAction('getCategories');

ConnectApi.UserContextInputRepresentation userContext = new
ConnectApi.UserContextInputRepresentation();
userContext.accountId = '001xx000003GYiEAAW';

runtime_industries_cpq.ContextDataInput data = new
runtime_industries_cpq.ContextDataInput();
String nodeNameVal = 'Quote__c';
Map<String,Object> nodeDataVal = new Map<String,Object>();
nodeDataVal.put('id', (Object)'0Q0xx0000004CDsCAM');
nodeDataVal.put('businessObjectType', (Object)'Quote');
data.nodeName = nodeNameVal;
data.nodeData = nodeDataVal;
List<runtime_industries_cpq.ContextDataInput> contextData= new
List<runtime_industries_cpq.ContextDataInput>();
contextData.add(data);
runtime_industries_cpq.AdditionalContextData additionalContextDataOut = new
runtime_industries_cpq.AdditionalContextData();
additionalContextDataOut.additionalContextData = new
List<runtime_industries_cpq.ContextDataInput>();
additionalContextDataOut.additionalContextData.add(data);

action.setInvocationParameter('catalogId', '0ZSxx0000000002GAA');
action.setInvocationParameter('correlationId', '9cbb9650-48c5-11ed-96d1-0afcf185843b');
action.setInvocationParameter('userContextInputRepresentation', userContext);
action.setInvocationParameter('enableQualificationProcedure', True);
action.setInvocationParameter('qualificationProcedureName', 'CatQual02');
action.setInvocationParameter('contextDefinitionName', 'CategoryCD');
action.setInvocationParameter('contextMappingName', 'ProductDiscoveryMapping');
action.setInvocationParameter('additionalContextData', additionalContextDataOut);
//action.setInvocationParameter('categoryDepth', 4);
//action.setInvocationParameter('parentCategoryId', '0ZGxx0000000001GAA');

List<Invocable.Action.Result> results = action.invoke();
System.debug('Search Action + '+results);

```

Here's a sample response when you call this action.

```

[
  {
    "actionName": "getCategories",
    "errors": null,
    "invocationId": null,
    "isSuccess": true,
    "outcome": null,
    "outputValues": {
      "resultCategoryList": [
        {
          "sortOrder": null,
          "qualificationContext": {
            "reason": "Category is not qualified because one or more field(s) do not

```

```

match the qualification criteria. Fields:- CategoryId - 0ZGxx0000000001GAA quotename -
null Max_Number_of_Employees - 1500 Min_Number_of_Employees - 1500",
  "isQualified": false
},
"parentCategoryId": null,
"name": "Laptops",
"isNavigational": true,
"id": "0ZGxx0000000001GAA",
"hasSubCategories": true,
"description": null,
"childCategories": [],
"catalogId": "0ZSxx0000000002GAA"
},
{
  "sortOrder": null,
  "qualificationContext": {
    "reason": null,
    "isQualified": true
  },
  "parentCategoryId": null,
  "name": "Desktops",
  "isNavigational": true,
  "id": "0ZGxx0000000002GAA",
  "hasSubCategories": false,
  "description": null,
  "childCategories": [],
  "catalogId": "0ZSxx0000000002GAA"
},
{
  "sortOrder": null,
  "qualificationContext": {
    "reason": null,
    "isQualified": true
  },
  "parentCategoryId": null,
  "name": "Accessories",
  "isNavigational": true,
  "id": "0ZGxx0000000003GAA",
  "hasSubCategories": false,
  "description": null,
  "childCategories": [],
  "catalogId": "0ZSxx0000000002GAA"
}
],
"resultListCount": 3,
"apiStatusOutputRepresentation": {
  "statusMessage": null,
  "statusCode": "FetchedDetailsSuccessfully",
  "messages": []
},
"correlationId": "9cbb9650-48c5-11ed-96d1-0afcf185843b"
},
"sortOrder": -1,
"version": 1

```

```
}
]
```

Get Category Details Action

Get details of a category record.

This action is available in API version 64.0 and later.

Special Access Rules

The Get Category Details action is available in Enterprise, Unlimited, and Developer Editions where Product Discovery is enabled.

Supported REST HTTP Methods

URI

`/services/data/v65.0/actions/standard/getCategoryDetails`

Formats

JSON, XML

HTTP Methods

POST

Authentication

Authorization: Bearer **token**

Inputs

Input	Details
additionalContextData	<p>Type</p> <p>Apex-defined</p> <p>Description</p> <p>Collection of Apex AdditionalContextData records that contain additional context data for nodes of the custom context definition, if applicable. You can add details for up to 10 nodes.</p>
catalogId	<p>Type</p> <p>string</p> <p>Description</p> <p>ID of the catalog record that's used to search for products within a category.</p>
categoryId	<p>Type</p> <p>string</p> <p>Description</p> <p>Required.</p> <p>ID of the category or subcategory that's used to search for products.</p>

Input	Details
contextDefinitionName	<p>Type</p> <p>string</p> <p>Description</p> <p>Name of the custom context definition that's used to create context data for categories. If null, the default context definition is used.</p>
contextMappingName	<p>Type</p> <p>string</p> <p>Description</p> <p>Name of the context mapping. By default, the default context mapping associated with the context definition is used.</p>
correlationId	<p>Type</p> <p>string</p> <p>Description</p> <p>Unique identifier attached to requests and messages, allowing reference to a specific transaction or event chain.</p>
enableQualificationProcedure	<p>Type</p> <p>boolean</p> <p>Description</p> <p>Indicates whether qualification rules are applied to categories (<code>true</code>) or not (<code>false</code>).</p>
filterInputRepresentation	<p>Type</p> <p>Apex-defined</p> <p>Description</p> <p>Collection of Apex FilterInputRepresentation records that contain the filter criteria applied to the category records.</p>
qualificationProcedureName	<p>Type</p> <p>string</p> <p>Description</p> <p>Name of the custom qualification procedure that's executed to determine the category list. If null, the default qualification procedure is executed.</p>
userContextInputRepresentation	<p>Type</p> <p>Apex-defined</p> <p>Description</p> <p>An Apex UserContextInputRepresentation record that contains user details, such as account ID, geographical location, language preferences, and more.</p>

Outputs

Output	Details
apiStatusOutputRepresentation	<p>Type</p> <p>Apex-defined</p> <p>Description</p> <p>An Apex ApiStatusOutputRepresentation record that contains the status of the request, including the status code and message.</p>
categoryDetailsRepresentations	<p>Type</p> <p>Apex-defined</p> <p>Description</p> <p>Collection of Apex CategoryDetailsRepresentation records that contain details about the retrieved category.</p>
correlationId	<p>Type</p> <p>string</p> <p>Description</p> <p>Unique identifier attached to requests and messages, allowing reference to a specific transaction or event chain.</p>

Example

POST

Here's a sample input to call this invocable action.

```
{
  "inputs": [
    {
      "categoryId": "0ZGxx000000001GAA",
      "correlationId": "9cbb9650-48c5-11ed-96d1-0afcf185843b",
      "additionalContextData": [
        {
          "nodeName": "Quote__c",
          "nodeData": {
            "id": "0Q0xx0000004CDsCAM",
            "businessObjectType": "Quote"
          }
        }
      ]
    },
    {
      "contextDefinitionName": "CategoryCD",
      "contextMappingName": "ProductDiscoveryMapping",
      "EnableQualificationProcedure": true,
      "QualificationProcedureName": "CatQual02",
      "userContextInputRepresentation": {
        "accountId": "001xx000003GYiEAAW"
      }
    }
  ]
}
```

```

    }
  ]
}

```

Here's a sample input to call this invocable action from Apex code.

```

Invocable.Action action = Invocable.Action.createStandardAction('getCategoryDetails');

ConnectApi.UserContextInputRepresentation userContext = new
ConnectApi.UserContextInputRepresentation();
userContext.accountId = '001xx000003GYiEAAW';

runtime_industries_cpq.ContextDataInput data = new
runtime_industries_cpq.ContextDataInput();
String nodeNameVal = 'Quote__c';
Map<String,Object> nodeDataVal = new Map<String,Object>();
nodeDataVal.put('id', (Object) '0Q0xx0000004CDsCAM');
nodeDataVal.put('businessObjectType', (Object) 'Quote');
data.nodeName = nodeNameVal;
data.nodeData = nodeDataVal;
List<runtime_industries_cpq.ContextDataInput> contextData= new
List<runtime_industries_cpq.ContextDataInput>();
contextData.add(data);
runtime_industries_cpq.AdditionalContextData additionalContextDataOut = new
runtime_industries_cpq.AdditionalContextData();
additionalContextDataOut.additionalContextData = new
List<runtime_industries_cpq.ContextDataInput>();
additionalContextDataOut.additionalContextData.add(data);

action.setInvocationParameter('categoryId', '0ZGxx0000000001GAA');
action.setInvocationParameter('correlationId', '9cbb9650-48c5-11ed-96d1-0afcf185843b');
action.setInvocationParameter('userContext', userContext);
action.setInvocationParameter('enableQualification', True);
action.setInvocationParameter('qualificationProcedure', 'CatQual02');
action.setInvocationParameter('contextDefinition', 'CategoryCD');
action.setInvocationParameter('contextMapping', 'ProductDiscoveryMapping');
action.setInvocationParameter('additionalContextData', additionalContextDataOut);

List<Invocable.Action.Result> results = action.invoke();
System.debug('Search Action + '+results);

```

Here's a sample response when you call this action.

```

{
  "root": [
    {
      "actionName": "getCategoryDetails",
      "errors": null,
      "invocationId": null,
      "isSuccess": true,
      "outcome": null,
      "outputValues": {
        "apiStatusOutputRepresentation": {
          "statusMessage": null,

```

```

        "statusCode": "FetchedDetailsSuccessfully",
        "messages": []
    },
    "correlationId": "9cbb9650-48c5-11ed-96d1-0afcf185843b",
    "categoryDetailsRepresentations": {
        "sortOrder": null,
        "qualificationContext": {
            "reason": "Category is not qualified because one or more field(s) do not
match the qualification criteria. Fields:- CategoryId - 0ZGxx0000000001GAA quotename -
null Max_Number_of_Employees - 1500 Min_Number_of_Employees - 1500",
            "isQualified": false
        },
        "parentCategoryId": null,
        "name": "Laptops",
        "isNavigational": true,
        "id": "0ZGxx0000000001GAA",
        "hasSubCategories": true,
        "description": null,
        "childCategories": [
            {
                "sortOrder": null,
                "qualificationContext": {
                    "reason": null,
                    "isQualified": true
                },
                "parentCategoryId": "0ZGxx0000000001GAA",
                "name": "level1",
                "isNavigational": true,
                "id": "0ZGxx000000004rGAA",
                "hasSubCategories": true,
                "description": null,
                "childCategories": [],
                "catalogId": null
            }
        ],
        "catalogId": "0ZSxx0000000002GAA"
    }
},
"sortOrder": -1,
"version": 1
}
]
}

```

Get Multiple Product Details Action

Get product details for a list of products.

This action is available in API version 64.0 and later.

Special Access Rules

The Get Multiple Product Details action is available in Enterprise, Unlimited, and Developer Editions where Product Discovery is enabled.

Supported REST HTTP Methods

URI

/services/data/v**65.0**/actions/standard/getMultipleProductDetails

Formats

JSON, XML

HTTP Methods

POST

Authentication

Authorization: Bearer *token*

Inputs

Input	Details
additionalContextData	<p>Type Apex-defined</p> <p>Description Collection of Apex AdditionalContextData records that contain additional context data for nodes of the custom context definition, if applicable. You can add details for up to 10 nodes.</p>
additionalFields	<p>Type Apex-defined</p> <p>Description An Apex AdditionalFields record that contains the additional fields that are passed for the Product2 object.</p>
catalogId	<p>Type string</p> <p>Description ID of the catalog record.</p>
contextDefinitionName	<p>Type string</p> <p>Description Name of the custom context definition that's used to create context data for categories. If null, the default context definition is used.</p>
contextMappingName	<p>Type string</p> <p>Description Name of the context mapping. By default, the default context mapping associated with the context definition is used.</p>

Input	Details
correlationId	<p>Type</p> <p>string</p> <p>Description</p> <p>Unique identifier attached to requests and messages, allowing reference to a specific transaction or event chain.</p>
currencyCode	<p>Type</p> <p>string</p> <p>Description</p> <p>Currency code that's used to calculate and show prices.</p>
enablePricing	<p>Type</p> <p>boolean</p> <p>Description</p> <p>Indicates whether pricing procedure must run (<code>true</code>) or not (<code>false</code>). The default value is <code>true</code>. To use this parameter, the Pricing Procedure setting must be enabled.</p>
enableQualificationProcedure	<p>Type</p> <p>boolean</p> <p>Description</p> <p>Indicates whether the qualification procedure is applied to categories (<code>true</code>) or not (<code>false</code>).</p>
priceBookId	<p>Type</p> <p>string</p> <p>Description</p> <p>ID of the pricebook that the pricing information is retrieved from.</p>
pricingProcedureName	<p>Type</p> <p>string</p> <p>Description</p> <p>Name of the pricing procedure to calculate product prices. If you don't enter a value, the pricing procedure selected on the Product Discovery Settings page is used.</p>
productDataInputs	<p>Type</p> <p>Apex-defined</p> <p>Description</p> <p>Required.</p> <p>Collection of Apex ProductDataInput records that contain details about the products that are to be retrieved.</p>

Input**Details**

qualificationProcedureName

Type

string

Description

Name of the custom qualification procedure that's executed to determine the category list. If null, the default qualification procedure is executed.

userContextInputRepresentation

Type

Apex-defined

Description

An Apex UserContextInputRepresentation record that contains user details, such as account ID, geographical location, language preferences, and more.

Outputs**Output****Details**

apiStatusOutputRepresentation

Type

Apex-defined

Description

An Apex ApiStatusOutputRepresentation record that contains the status of the request, including the status code and message.

contextId

Type

string

Description

ID of the context that's created using the specified context definition.

correlationId

Type

string

Description

Unique identifier attached to requests and messages, allowing reference to a specific transaction or event chain.

productDetailsOutputRepresentation

Type

Apex-defined

Description

Collection of Apex BulkProductDetailsRepresentation records that contain details of available products.

Output	Details
userContext	<p>Type</p> <p>Apex-defined</p> <p>Description</p> <p>An Apex ConnectApi.UserContextRepresentation record containing user information.</p>

Example

POST

Here's a sample input to call this invocable action.

```
{
  "inputs": [
    {
      "productDataInputs": {
        "productData": [
          {
            "productId": "01txx0000006i2rAAA",
            "productSellingModelId": "0jPxx0000000002EAA"
          },
          {
            "productId": "01txx0000006i2oAAA",
            "productSellingModelId": "0jPxx0000000002EAA"
          }
        ]
      },
      "priceBookId": "01sxx0000005ptpAAA",
      "correlationId": "9cbb9650-48c5-11ed-96d1-0afcf185843b",
      "enableQualification": true,
      "enablePricing": true,
      "catalogId": "0ZSxx0000000002GAA",
      "userContext": {
        "accountId": "001xx000003GYiFAAW"
      },
      "currencyCode": "USD"
    }
  ]
}
```

Here's a sample input to call this invocable action from Apex code.

```
Invocable.Action action =
Invocable.Action.createStandardAction('getMultipleProductDetails');

List<runtime_industries_cpq.BulkProductDetailsInputBody> productDataList = new
List<runtime_industries_cpq.BulkProductDetailsInputBody>();
runtime_industries_cpq.BulkProductDetailsInputBody productData = new
runtime_industries_cpq.BulkProductDetailsInputBody();
productData.productId = '01tIY000000nCxhYAE';

productDataList.add(productData);
```



```
runtime_industries_cpq.BulkProductDetailsInputBodyList productList = new
runtime_industries_cpq.BulkProductDetailsInputBodyList();
productList.productData = productDataList;

action.setInvocationParameter('productDataInputs', productList);

List<Invocable.Action.Result> results = action.invoke();
System.debug('Result === ' + results);
```

Here's a sample response when you call this action.

```
[
  {
    "actionName": "getMultipleProductDetails",
    "errors": null,
    "invocationId": null,
    "isSuccess": true,
    "outcome": null,
    "outputValues": {
      "apiStatusOutputRepresentation": {
        "statusMessage": null,
        "statusCode": "FetchedDetailsSuccessfully",
        "messages": []
      },
      "correlationId": "9cbb9650-48c5-11ed-96d1-0afcf185843b",
      "contextId": null,
      "productDetailsOutputRepresentation": [
        {
          "unitOfMeasure": {
            "unitCode": null,
            "scale": null,
            "roundingMethod": null,
            "name": null,
            "id": null
          },
          "status": null,
          "qualificationContext": null,
          "productType": null,
          "productSpecificationType": null,
          "productSellingModelOptions": [
            {
              "productSellingModelId": "0jPxx0000000002EAA",
              "productSellingModel": {
                "status": "Active",
                "sellingModelType": "TermDefined",
                "pricingTermUnit": "Annual",
                "pricingTerm": 1,
                "name": "Term Based - Yearly",
                "id": "0jPxx0000000002EAA"
              },
              "productId": "01txx0000006i2oAAA",
              "id": "0iOxx000000000JEAQ"
            }
          ]
        }
      ],
    }
  ]
```

```
"productRelatedComponent": {
  "unitOfMeasure": null,
  "sequence": null,
  "quoteVisibility": null,
  "quantityScaleMethod": null,
  "quantity": null,
  "productRelationshipTypeId": null,
  "productComponentGroupId": null,
  "productClassificationId": null,
  "parentSellingModelId": null,
  "parentProductId": null,
  "minQuantity": null,
  "maxQuantity": null,
  "isQuantityEditable": null,
  "isExcluded": null,
  "isDefaultComponent": null,
  "isComponentRequired": null,
  "id": null,
  "doesBundlePriceIncludeChild": null,
  "childSellingModelId": null,
  "childProductId": null
},
"productQuantity": {
  "quantity": null,
  "minQuantity": null,
  "maxQuantity": null
},
"productPricingInformation": null,
"productInformation": null,
"productComponentGroups": [],
"productCode": "ASTCERT001",
"productClassification": {
  "id": null
},
"prices": [
  {
    "pricingModel": {
      "unitOfMeasure": null,
      "pricingModelType": "TermDefined",
      "occurrence": 1,
      "name": "Term Based - Yearly",
      "id": "0jPxx0000000002EAA",
      "frequency": "Annual"
    },
    "priceBookId": "01sxx0000005ptpAAA",
    "priceBookEntryId": "01luxx0000008yXaAAI",
    "price": 2000,
    "isSelected": true,
    "isDerived": false,
    "isDefault": true,
    "effectiveTo": null,
    "effectiveFrom": null,
    "currencyIsoCode": "USD"
  }
]
```

```

    ],
    "nodeType": "simpleProduct",
    "name": "AI Specialist Certification",
    "isSoldOnlyWithOtherProds": false,
    "isQuantityEditable": null,
    "isDefaultComponent": null,
    "isComponentRequired": null,
    "isAssetizable": true,
    "isActive": true,
    "id": "01txx0000006i2oAAA",
    "endOfLifeDate": null,
    "displayUrl":
https://encrypted-tbn0.gstatic.com/images?q=tbn:ANd9Gqsp4GUP\_nGiXJ-wzYkP-RIA\_UUMZIDv3slxTQqYrdVHUZe6QkUixEDgo&sq=CA,
    "discontinuedDate": null,
    "description": "The Certified Artificial Intelligence Expert certification is typically designed for individuals who have an in-depth understanding of artificial intelligence (AI) concepts, algorithms, and applications and want to validate their expertise in the field.",
    "configureDuringSale": "NotAllowed",
    "childProducts": [],
    "catalogs": [],
    "availabilityDate": null,
    "attributes": [],
    "attributeCategories": [],
    "additionalFields": []
  },
  {
    "unitOfMeasure": {
      "unitCode": null,
      "scale": null,
      "roundingMethod": null,
      "name": null,
      "id": null
    },
    "status": null,
    "qualificationContext": null,
    "productType": null,
    "productSpecificationType": null,
    "productSellingModelOptions": [
      {
        "productSellingModelId": "0jPxx0000000002EAA",
        "productSellingModel": {
          "status": "Active",
          "sellingModelType": "TermDefined",
          "pricingTermUnit": "Annual",
          "pricingTerm": 1,
          "name": "Term Based - Yearly",
          "id": "0jPxx0000000002EAA"
        },
        "productId": "01txx0000006i2rAAA",
        "id": "0iOxx000000000QEAO"
      }
    ]
  }
],

```

```

"productRelatedComponent": {
  "unitOfMeasure": null,
  "sequence": null,
  "quoteVisibility": null,
  "quantityScaleMethod": null,
  "quantity": null,
  "productRelationshipTypeId": null,
  "productComponentGroupId": null,
  "productClassificationId": null,
  "parentSellingModelId": null,
  "parentProductId": null,
  "minQuantity": null,
  "maxQuantity": null,
  "isQuantityEditable": null,
  "isExcluded": null,
  "isDefaultComponent": null,
  "isComponentRequired": null,
  "id": null,
  "doesBundlePriceIncludeChild": null,
  "childSellingModelId": null,
  "childProductId": null
},
"productQuantity": {
  "quantity": null,
  "minQuantity": null,
  "maxQuantity": null
},
"productPricingInformation": null,
"productInformation": null,
"productComponentGroups": [],
"productCode": "ACERT001",
"productClassification": {
  "id": null
},
"prices": [
  {
    "pricingModel": {
      "unitOfMeasure": null,
      "pricingModelType": "TermDefined",
      "occurrence": 1,
      "name": "Term Based - Yearly",
      "id": "0jPxx0000000002EAA",
      "frequency": "Annual"
    },
    "priceBookId": "01sxx0000005ptpAAA",
    "priceBookEntryId": "01luxx0000008yXdAAI",
    "price": 2000,
    "isSelected": true,
    "isDerived": false,
    "isDefault": true,
    "effectiveTo": null,
    "effectiveFrom": null,
    "currencyIsoCode": "USD"
  }
]

```

```

    ],
    "nodeType": "simpleProduct",
    "name": "Admin Certification",
    "isSoldOnlyWithOtherProds": false,
    "isQuantityEditable": null,
    "isDefaultComponent": null,
    "isComponentRequired": null,
    "isAssetizable": true,
    "isActive": true,
    "id": "01txx0000006i2rAAA",
    "endOfLifeDate": null,
    "displayUrl": null,
    "discontinuedDate": null,
    "description": null,
    "configureDuringSale": "Allowed",
    "childProducts": [],
    "catalogs": [],
    "availabilityDate": null,
    "attributes": [],
    "attributeCategories": [],
    "additionalFields": []
  }
]
},
"sortOrder": -1,
"version": 1
}
]

```

Get Products Action

Get products from the specified catalog, category, or subcategory, including product qualification and pricing details.

If a catalog, category, or subcategory isn't specified, then this action retrieves all the products from all catalogs. This action is available in API version 62.0 and later.

Special Access Rules

The Get Products action is available in Enterprise, Unlimited, and Developer Editions where Product Discovery is enabled.

Supported REST HTTP Methods

URI

`/services/data/v65.0/actions/standard/getProducts`

Formats

JSON, XML

HTTP Methods

POST

Authentication

Authorization: Bearer *token*

Inputs

Input	Details
<code>additionalContextData</code>	<p>Type Apex-defined</p> <p>Description An array of Apex <code>runtime_industries_cpq.AdditionalContextData</code> records that contain the additional nodes that are used along with the context definition nodes for data hydration. The maximum number of supported nodes is 10.</p>
<code>additionalFields</code>	<p>Type Apex-defined</p> <p>Description An Apex <code>runtime_industries_cpq.AdditionalFields</code> record that contains an array of additional standard or custom fields to include in the response. The supported objects are:</p> <ul style="list-style-type: none"> • <code>Product2</code> • <code>ProductAttributeDefinition</code>—If the fields defined for the <code>ProductAttributeDefinition</code> object aren't available for the <code>ProductClassificationAttr</code> object, then the API request fails.
<code>catalogId</code>	<p>Type string</p> <p>Description Catalog ID that's used to find and retrieve the products.</p>
<code>categoryId</code>	<p>Type string</p> <p>Description ID of the category or subcategory to get the products for.</p>
<code>contextDefinition</code>	<p>Type string</p> <p>Description API name of the context definition that's used for context creation. If you don't specify a value, the context selected on the Product Discovery Settings page from Setup is used.</p>

Input	Details
contextMapping	<p>Type</p> <p>string</p> <p>Description</p> <p>API name of the context mapping that's used for data hydration.</p> <p>The value of this parameter is used only if it belongs to the specified context definition.</p>
correlationId	<p>Type</p> <p>string</p> <p>Description</p> <p>Unique ID that's used to reference a series of related actions.</p>
currencyCode	<p>Type</p> <p>string</p> <p>Description</p> <p>Currency code that's used to calculate and show prices. Only the products with the currency code matching the specified currency code are fetched.</p>
cursor	<p>Type</p> <p>string</p> <p>Description</p> <p>Unique identifier that represents the position of the product from which the next set of results are retrieved.</p>
enablePricing	<p>Type</p> <p>boolean</p> <p>Description</p> <p>Indicates whether the pricing procedure must run (<code>true</code>) or not (<code>false</code>).</p> <p>The default value is <code>true</code>. To use this parameter, you must enable the Pricing Procedure setting from Setup.</p>
enableQualification	<p>Type</p> <p>boolean</p> <p>Description</p> <p>Indicates whether the qualification procedure must run (<code>true</code>) or not (<code>false</code>).</p> <p>The default value is <code>true</code>. To use this parameter, you must enable the Qualification Procedure setting from Setup.</p>

Input	Details
<code>filter</code>	<p>Type Apex-defined</p> <p>Description A collection of Apex <code>runtime_industries_cpq.FilterInputRepresentation</code> records where each record contains a related object and the filter criteria that's applied on the object. The <code>filter</code> parameter supports only the <code>name</code> property. The supported operators are:</p> <ul style="list-style-type: none">• <code>eq</code>• <code>in</code>• <code>contains</code> <p>If this parameter contains multiple criteria, all the criteria are applied.</p>
<code>includeCatalogDetails</code>	<p>Type boolean</p> <p>Description Indicates whether catalog details must be included in the response (<code>true</code>) or not (<code>false</code>).</p>
<code>limit</code>	<p>Type integer</p> <p>Description Maximum number of results to be returned in the response. Specify a value from 1 through 100. The default value is 10.</p>
<code>orderBy</code>	<p>Type string</p> <p>Description Comma-separated string of key-value pairs that specify how the results are sorted. Each string must contain a field name and its sort order. For example, <code>["name:asc","custom_field:asc"]</code>.</p>
<code>priceBookId</code>	<p>Type string</p> <p>Description ID of the pricebook that the pricing details are retrieved from.</p>
<code>pricingProcedure</code>	<p>Type string</p>

Input**Details****Description**

API name of the pricing procedure to calculate product prices. If you don't specify a value, the pricing procedure selected on the Product Discovery Settings page from Setup is used.

productClassificationId

Type

string

Description

ID of the product classification that's used to filter the products.

qualificationProcedure

Type

string

Description

API name of the qualification procedure to evaluate product eligibility. If you don't specify a value, the qualification procedure selected on the Product Discovery Settings page from Setup is used.

relatedObjectFilters

Type

Apex-defined

Description

A collection of Apex `runtime_industries_cpq.RelatedObjectFilterInputRepresentation` records, where each record contains a related object and the filter criteria that's applied on the object.

userContext

Type

Apex-defined

Description

An Apex `ConnectApi.UserContextInputRepresentation` record that contains the user details to evaluate product eligibility and calculate prices.

Outputs**Output****Details**

apiStatus

Type

Apex-defined

Description

An Apex `runtime_industries_cpq.ApiStatusRepresentation` record that contains a status code and message.

Output	Details
contextId	<p>Type</p> <p>string</p> <p>Description</p> <p>ID of the context that's created by using the specified context definition.</p>
correlationId	<p>Type</p> <p>string</p> <p>Description</p> <p>ID to reference a series of related actions.</p>
cursor	<p>Type</p> <p>string</p> <p>Description</p> <p>Unique identifier that represents the position of the product from which the next set of results are retrieved.</p>
results	<p>Type</p> <p>Apex-defined</p> <p>Description</p> <p>An Apex <code>runtime_industries_cpq.ProductListRepresentation</code> record that contains the retrieved products.</p>
userContext	<p>Type</p> <p>Apex-defined</p> <p>Description</p> <p>An Apex <code>ConnectApi.UserContextRepresentation</code> record that includes the user details.</p>

Example

POST

This sample request is for the Get Products action.

```
{
  "inputs": [
    {
      "additionalContextData": [
        {
          "nodeName": "Contract",
          "nodeData": {
            "id": "xxxxxx231",
```

```

        "name": "Contract1"
      }
    },
    {
      "nodeName": "Lead",
      "nodeData": {
        "id": "1111111131",
        "name": "Lead1"
      }
    }
  ],
  "additionalFields": {
    "Product2": {
      "fields": [
        "CustomField1__c",
        "StandardField1"
      ]
    }
  },
  "correlationId": "9cbb9650-48c5-11ed-96d1-0afcf185843b",
  "catalogId": "0ZSxx000000001GAA",
  "categoryId": "0ZGxx000000004TAJ",
  "currencyCode": "USD",
  "priceBookId": "01sxx0000005puLAAQ",
  "productClassificationId": "11BRO0000000222AA",
  "limit": 10,
  "cursor": "MTAwMDAwMDAwNg==",
  "orderBy": [
    "name:asc"
  ],
  "userContext": {
    "accountId": "001xx000000001AAA"
  },
  "enableQualification": true,
  "enablePricing": true,
  "qualificationProcedure": "QualificationProcedure",
  "pricingProcedure": "Preview",
  "contextDefinition": "TestDefinition",
  "contextMapping": "TestDefinitionNode",
  "filter": {
    "criteria": [
      {
        "property": "name",
        "operator": "eq",
        "value": "Catalog_Name_1"
      }
    ]
  },
  "relatedObjectFilters": [
    {
      "objectName": "ProductSpecificationRecType",
      "criteria": [
        {
          "property": "IsCommercial",

```

```

        "operator": "eq",
        "value": true
      }
    ]
  }
]
}
}

```

This is the sample response for the Get Products action.

```

{
  "apiStatus": {
    "messages": [],
    "statusCode": "FETCHED_DETAILS_SUCCESSFULLY"
  },
  "contextId": "OU3RM0000000SR0AY",
  "correlationId": "9cbb9650-48c5-11ed-96d1-0afcf185843b",
  "cursor": "MTAwMDAwMDAwNg==",
  "result": [
    {
      "additionalFields": {
        "CustomField1__c": "TextValue",
        "CustomField2__c": "10",
        "StandardField1": "false"
      },
      "description": "iPhone-13",
      "id": "01txx0000006kYwAAI",
      "name": "Sample product 1",
      "prices": [
        {
          "price": 150,
          "priceBookEntryId": "12Axx0000004DF7EAM",
          "priceBookId": "01sxx0000005puLAAQ",
          "pricingModel": {
            "frequency": "Monthly",
            "id": "12Bxx000000CicDEA0",
            "name": "iPhone-13",
            "occurrence": 6,
            "pricingModelType": "Recurring"
          }
        }
      ],
      {
        "price": 400,
        "priceBookEntryId": "12Axx0000004DGjEAM",
        "priceBookId": "01sxx0000005puLAAQ",
        "pricingModel": {
          "id": "12Bxx000000CicCEA0",
          "name": "iPhone-13",
          "pricingModelType": "OneTime"
        }
      }
    ]
  },
  "qualificationContext": {

```

```

        "isQualified": true
    }
},
{
    "additionalFields": {
        "CustomField1__c": "TextValue",
        "CustomField2__c": "10",
        "StandardField1": "false"
    },
    "description": "Sample product 2",
    "name": "Sample product 2",
    "id": "01txx0000006kYwAAI",
    "prices": [],
    "qualificationContext": {
        "isQualified": false
    }
},
{
    "description": "Sample product 3",
    "name": "Sample product 3",
    "id": "01txx0000006kYwAAI",
    "prices": [],
    "qualificationContext": {
        "isQualified": true
    }
}
],
"userContext": {
    "accountId": "001xx0000000001AAA"
}
}

```

Usage of an Apex-Defined Data Type in a Flow

To use an Apex-defined input parameter in a Flow, follow these guidelines.

Create an Apex class

Create an Apex class defining the input and output parameters. In the flow, include the Apex-defined input parameters for which you want to add the details. In this example, we have created a class named `ProductServiceAction` that takes an object's API name and record ID as input, and returns the additional context data.

```

public class ProductServiceAction {
    // Define input parameters
    public class FlowInput{
        @InvocableVariable(required=false)
        public String objectApiName;

        @InvocableVariable(required=false)
        public String recordId;
    }

    // Define output parameters
    public class FlowOutput{
        @invocableVariable

```

```

        public runtime_industries_cpq.AdditionalContextData
additionalContextDataFinalOutput = new runtime_industries_cpq.AdditionalContextData();

        @invocableVariable
        public runtime_industries_cpq.RelatedObjectFilterInputRepresentation
relatedObjectFilter = new runtime_industries_cpq.RelatedObjectFilterInputRepresentation();

        @invocableVariable
        public ConnectApi.UserContextInputRepresentation userContext = new
ConnectApi.UserContextInputRepresentation();

    }

    // This method is invoked from a Flow
    @InvocableMethod(label='Process Input' description='Creates the Array of
ContextDataInput for additional Context Data')
    public static List<FlowOutput> processContextData(List<FlowInput> inputs){
        String apiName;
        String recId;
        FlowOutput output = new FlowOutput();

        // Capture input from the flow
        for(FlowInput input: inputs){
            apiName = input.objectApiName;
            recId = input.recordId;
        }

        // Populate the ContextDataInput list to store additional context data
        List<runtime_industries_cpq.ContextDataInput> listContextData = new
List<runtime_industries_cpq.ContextDataInput>();
        runtime_industries_cpq.ContextDataInput cdl = new
runtime_industries_cpq.ContextDataInput();
        cdl.nodeName = apiName;
        cdl.nodeData = new Map<String, Object>();
        cdl.nodeData.put('id', recId);
        listContextData.add(cdl);

        output.additionalContextDataFinalOutput.additionalContextData = listContextData;

        List<FlowOutput> flowOutputs = new List<FlowOutput>();
        flowOutputs.add(output);

        List<runtime_industries_cpq.RelatedObjectFilter> relatedObjectFilterList = new
List<runtime_industries_cpq.RelatedObjectFilter>();

        runtime_industries_cpq.RelatedObjectFilter relatedObjectFilter = new
runtime_industries_cpq.RelatedObjectFilter();

        relatedObjectFilter.objectName = 'ProductSpecificationRecType';
        List<runtime_industries_cpq.FilterCriteriaInputRepresentation> criteriaList =
new List<runtime_industries_cpq.FilterCriteriaInputRepresentation>();
        runtime_industries_cpq.FilterCriteriaInputRepresentation criteria = new
runtime_industries_cpq.FilterCriteriaInputRepresentation();
        criteria.property = 'IsCommercial';

```

```

        criteria.operator = 'eq';
        criteria.value = 'true';
        criteriaList.add(criteria);
        relatedObjectFilter.criteria = criteriaList;

        relatedObjectFilterList.add(relatedObjectFilter);

        output.relatedObjectFilter.relatedObjectFilter = relatedObjectFilterList;

output.userContext.accountId = '001Hs00003r17HNIAY';

        return flowOutputs;
    }
}

```

Create a Flow with the necessary variables and components

Create a flow that enables users to add a search term to find products. Add the ProductService action that you've created above by using Apex. When a flow is invoked from a record, the flow sends the record's objectApiName and recordId to the Apex class, which then generates the flow output. The flow passes the objectApiName and recordId of the record that the flow is invoked from to the Apex class to generate the flow output. See [Example of How to Create a Flow for Product Discovery](#).

Configure the action

Configure the action (for example, Get Products action) to add values for the Apex-defined input parameters. Use the output of the created Apex class as the input of the Apex-defined parameter in the Get Products action, which users can use to get products.

Get Product Details Action

Get details such as attributes, hierarchy, and cardinality for the specified product.

This action is available in API version 62.0 and later.

Special Access Rules

The Get Product Details action is available in Enterprise, Unlimited, and Developer Editions where Product Discovery is enabled.

Supported REST HTTP Methods

URI

/services/data/v**65.0**/actions/standard/getProductDetails

Formats

JSON, XML

HTTP Methods

POST

Authentication

Authorization: Bearer **token**

Inputs

Input	Details
<code>additionalContextData</code>	<p>Type</p> <p>Apex-defined</p> <p>Description</p> <p>An array of Apex <code>runtime_industries_cpq.AdditionalContextData</code> records that contain the additional nodes that are used along with the context definition nodes for data hydration.</p> <p>The maximum number of supported nodes is 10.</p>
<code>additionalFields</code>	<p>Type</p> <p>Apex-defined</p> <p>Description</p> <p>An Apex <code>runtime_industries_cpq.AdditionalFields</code> record that contains an array of additional standard or custom fields to include in the response.</p> <p>The supported objects are:</p> <ul style="list-style-type: none"> • <code>Product2</code> • <code>ProductAttributeDefinition</code>—If the fields defined for the <code>ProductAttributeDefinition</code> object aren't available for the <code>ProductClassificationAttr</code> object, then the API request fails.
<code>catalogId</code>	<p>Type</p> <p>string</p> <p>Description</p> <p>Catalog ID that's used to find and retrieve the products.</p>
<code>contextDefinition</code>	<p>Type</p> <p>string</p> <p>Description</p> <p>API name of the context definition for context creation.</p> <p>If you don't provide a value, the context selected on the Product Discovery Settings page from Setup is used.</p>
<code>contextMapping</code>	<p>Type</p> <p>string</p> <p>Description</p> <p>API name of the context mapping for data hydration. The value of this parameter is used only if it belongs to the specified context definition.</p>

Input	Details
correlationId	<p>Type</p> <p>string</p> <p>Description</p> <p>Currency code that's used to calculate and show prices. Only the products with the currency code matching the specified currency code are fetched.</p>
currencyCode	<p>Type</p> <p>string</p> <p>Description</p> <p>Currency code that's used to calculate and show prices.</p>
enablePricing	<p>Type</p> <p>boolean</p> <p>Description</p> <p>Indicates whether the pricing procedure must run (<code>true</code>) or not (<code>false</code>).</p> <p>The default value is <code>true</code>.</p> <p>To use this parameter, you must enable the Pricing Procedure setting from Setup.</p>
enableQualification	<p>Type</p> <p>boolean</p> <p>Description</p> <p>Indicates whether the qualification procedure must run (<code>true</code>) or not (<code>false</code>).</p> <p>The default value is <code>true</code>.</p> <p>To use this parameter, you must enable the Qualification Procedure setting from Setup.</p>
priceBookId	<p>Type</p> <p>string</p> <p>Description</p> <p>ID of the pricebook from which you want to retrieve the pricing details.</p>
pricingProcedure	<p>Type</p> <p>string</p> <p>Description</p> <p>API name of the pricing procedure to calculate product prices.</p> <p>If you don't specify a value, the pricing procedure selected on the Product Discovery Settings page from Setup is used.</p>

Input	Details
productId	<p>Type string</p> <p>Description Required. ID of the product to get the details for.</p>
productSellingModelId	<p>Type string</p> <p>Description ID of the product selling model.</p>
qualificationProcedure	<p>Type string</p> <p>Description API name of the qualification procedure to evaluate product eligibility. If you don't specify a value, the qualification procedure selected on the Product Discovery Settings page from Setup is used.</p>
userContext	<p>Type Apex-defined</p> <p>Description An Apex <code>ConnectApi.UserContextInputRepresentation</code> record that contains the user details to evaluate product eligibility and calculate prices.</p>

Outputs

Output	Details
apiStatus	<p>Type Apex-defined</p> <p>Description An Apex <code>runtime_industries_cpq.ApiStatusRepresentation</code> record that contains a status code and message.</p>
contextId	<p>Type string</p> <p>Description ID of the context that's created by using the specified context definition.</p>

Output	Details
correlationId	<p>Type</p> <p>string</p> <p>Description</p> <p>ID to reference a series of related actions.</p>
results	<p>Type</p> <p>Apex-defined</p> <p>Description</p> <p>An Apex runtime_industries_cpq.ProductDetailsRepresentation record that contains the product details.</p>
userContext	<p>Type</p> <p>Apex-defined</p> <p>Description</p> <p>An Apex ConnectApi.UserContextRepresentation record that contains the user details.</p>

Example

POST

This sample request is for the Get Product Details action.

```
{
  "inputs": [{
    "additionalContextData": [
      {
        "nodeName": "Contract",
        "nodeData": {
          "id": "xxxxxx231",
          "name": "Contract1"
        }
      },
      {
        "nodeName": "Lead",
        "nodeData": {
          "id": "111111131",
          "name": "Lead1"
        }
      }
    ],
    "additionalFields": {
      "Product2": {
        "fields": [
          "CustomField1__c",
          "StandardField1"
        ]
      }
    }
  }
}
```

```

    ]
  }
},
"correlationId": "9cbb9650-48c5-11ed-96d1-0afcf185843b",
"catalogId": "0ZSxx000000001GAA",
"currencyCode": "USD",
"priceBookId": "01sxx0000005puLAAQ",
"productId": "01txx0000006j08AAA",
"productSellingModelId": "0jPxx000000004rEAA",
"userContext": {
  "accountId": "001xx000000001AAA"
},
"enableQualification": true,
"enablePricing": true,
"qualificationProcedure": "QualificationProcedure",
"pricingProcedure": "Preview",
"contextDefinition": "TestDefinition",
"contextMapping": "TestDefinitionNode"
}]
}

```

This is the sample response for the Get Product Details action.

```

{
  "apiStatus": {
    "messages": [],
    "statusCode": "FETCHED_DETAILS_SUCCESSFULLY"
  },
  "contextId": "0U3RM00000000SR0AY",
  "correlationId": "9cbb9650-48c5-11ed-96d1-0afcf185843b",
  "result": [
    {
      "additionalFields": {
        "CustomField1__c": "TextValue",
        "CustomField2__c": "10",
        "StandardField1": "false"
      },
      "description": "iPhone-13",
      "id": "01txx0000006kYwAAI",
      "name": "Sample product 1",
      "prices": [
        {
          "price": 150,
          "priceBookEntryId": "12Axx0000004DF7EAM",
          "priceBookId": "01sxx0000005puLAAQ",
          "pricingModel": {
            "frequency": "Monthly",
            "id": "12Bxx000000CicDEA0",
            "name": "iPhone-13",
            "occurrence": 6,
            "pricingModelType": "Recurring"
          }
        },
        {
          "price": 400,

```

```

        "priceBookEntryId": "12Axx0000004DGjEAM",
        "priceBookId": "01sxx0000005puLAAQ",
        "pricingModel": {
            "id": "12Bxx0000000CiCCEA0",
            "name": "IPhone-13",
            "pricingModelType": "OneTime"
        }
    },
    "qualificationContext": {
        "isQualified": true
    }
},
{
    "additionalFields": {
        "CustomField1__c": "TextValue",
        "CustomField2__c": "10",
        "StandardField1": "false"
    },
    "description": "Sample product 2",
    "name": "Sample product 2",
    "id": "01txx00000006kYwAAI",
    "prices": [],
    "qualificationContext": {
        "isQualified": false
    }
},
{
    "description": "Sample product 3",
    "name": "Sample product 3",
    "id": "01txx00000006kYwAAI",
    "prices": [],
    "qualificationContext": {
        "isQualified": true
    }
}
],
"userContext": {
    "accountId": "001xx0000000001AAA"
}
}

```

Usage of an Apex-Defined Data Type in a Flow

To use an Apex-defined input parameter in a flow, follow these guidelines.

Create an Apex Class

Create an Apex class defining the input and output parameters. In the flow, include the Apex-defined input parameters for which you want to add the details. In this example, we have created a class named `ProductServiceAction` that takes an object's API name and record ID as input, and returns the additional context data.

```

public class ProductServiceAction {
    // Define input parameters
    public class FlowInput{

```

```

        @InvocableVariable(required=false)
        public String objectApiName;

        @InvocableVariable(required=false)
        public String recordId;
    }

    // Define output parameters
    public class FlowOutput{
        @invocableVariable
        public runtime_industries_cpq.AdditionalContextData
additionalContextDataFinalOutput = new runtime_industries_cpq.AdditionalContextData();

    }

    // This method is invoked from a Flow
    @InvocableMethod(label='Process Input' description='Creates the Array of
ContextDataInput for additional Context Data')
    public static List<FlowOutput> processContextData(List<FlowInput> inputs){
        String apiName;
        String recId;
        FlowOutput output = new FlowOutput();

        // Capture input from the flow
        for(FlowInput input: inputs){
            apiName = input.objectApiName;
            recId = input.recordId;
        }

        // Populate the ContextDataInput list to store additional context data
        List<runtime_industries_cpq.ContextDataInput> listContextData = new
List<runtime_industries_cpq.ContextDataInput>();
        runtime_industries_cpq.ContextDataInput cdl = new
runtime_industries_cpq.ContextDataInput();
        cdl.nodeName = apiName;
        cdl.nodeData = new Map<String, Object>();
        cdl.nodeData.put('id', recId);
        listContextData.add(cdl);

        output.additionalContextDataFinalOutput.additionalContextData = listContextData;

        List<FlowOutput> flowOutputs = new List<FlowOutput>();
        flowOutputs.add(output);

        List<runtime_industries_cpq.RelatedObjectFilter> relatedObjectFilterList = new
List<runtime_industries_cpq.RelatedObjectFilter>();

        runtime_industries_cpq.RelatedObjectFilter relatedObjectFilter = new
runtime_industries_cpq.RelatedObjectFilter();

        relatedObjectFilter.objectName = 'ProductSpecificationRecType';
        List<runtime_industries_cpq.FilterCriteriaInputRepresentation> criteriaList =
new List<runtime_industries_cpq.FilterCriteriaInputRepresentation>();
        runtime_industries_cpq.FilterCriteriaInputRepresentation criteria = new
runtime_industries_cpq.FilterCriteriaInputRepresentation();

```

```

        criteria.property = 'IsCommercial';
        criteria.operator = 'eq';
        criteria.value = 'true';
        criteriaList.add(criteria);
        relatedObjectFilter.criteria = criteriaList;

        relatedObjectFilterList.add(relatedObjectFilter);
        output.relatedObjectFilter.relatedObjectFilter = relatedObjectFilterList;

output.userContext.accountId = '001DU000001nx9BYAQ';

        return flowOutputs;
    }
}

```

Create a Flow with the Necessary Variables and Components

Create a flow that enables users to add a search term to find products. Add the ProductService action that you've created above by using Apex. When a flow is invoked from a record, the flow sends the record's objectApiName and recordId to the Apex class, which then generates the flow output. The flow passes the objectApiName and recordId of the record that the flow is invoked from to the Apex class to generate the flow output. See [Example of How to Create a Flow for Product Discovery](#).

Configure the action

Configure the action (for example, Get Product Details action) to add values for the Apex-defined input parameters. Use the output of the created Apex class as the input of the Apex-defined parameter in the Get Product Details action, which users can use to get the product details.

Search Product with Guided Selection Action

Use guided product selection to search for products.

This action is available in API version 64.0 and later.

Special Access Rules

The Search Product with Guided Selection action is available in Enterprise, Unlimited, and Developer Editions where Product Discovery is enabled.

Supported REST HTTP Methods

URI

/services/data/v**65.0**/actions/standard/searchPrdctWithGuidedSelection

Formats

JSON, XML

HTTP Methods

POST

Authentication

Authorization: Bearer *token*

Inputs

Input	Details
additionalContextData	<p>Type</p> <p>Apex-defined</p> <p>Description</p> <p>Collection of Apex runtime_industries_cpq.AdditionalContextData records that contain the nodes used in addition to context definition nodes for data hydration. This parameter can contain up to 10 nodes.</p>
additionalFields	<p>Type</p> <p>Apex-defined</p> <p>Description</p> <p>An Apex runtime_industries_cpq.AdditionalFields record that contains the collection of additional fields to be included in the response. This parameter supports only the fields from the Product2 and ProductAttributeDefinition objects. The fields defined for the ProductAttributeDefinition object must also be available on the ProductClassificationAttr object.</p>
catalogId	<p>Type</p> <p>string</p> <p>Description</p> <p>ID of the catalog to find and retrieve products.</p>
categoryId	<p>Type</p> <p>string</p> <p>Description</p> <p>ID of the category or subcategory to find and retrieve products.</p>
contextDefinition	<p>Type</p> <p>string</p> <p>Description</p> <p>API name of the context definition that's used for context creation. If you don't specify a value, the context selected on the Product Discovery Settings page is used.</p>
contextMapping	<p>Type</p> <p>string</p> <p>Description</p> <p>API name of the context mapping that's used for data hydration. The value of this parameter is used only if it belongs to the specified context definition.</p>
correlationId	<p>Type</p> <p>string</p>

Input	Details
	<p>Description Unique ID that's used to reference a series of related actions.</p>
currencyCode	<p>Type string</p> <p>Description Currency code that's used to calculate and show prices. Only the products with the currency code matching the entered currency code are fetched.</p>
enablePricing	<p>Type boolean</p> <p>Description Indicates whether pricing procedure must run (<code>true</code>) or not (<code>false</code>). The default value is <code>true</code>. To use this parameter, the Pricing Procedure setting must be enabled.</p>
enableQualification	<p>Type boolean</p> <p>Description Indicates whether qualification procedure must run (<code>true</code>) or not (<code>false</code>). The default value is <code>true</code>. To use this parameter, the Qualification Procedure setting must be enabled.</p>
filterInputRepresentation	<p>Type Apex-defined</p> <p>Description An Apex runtime_industries_cpq.FilterInputRepresentation record that contains the filter criteria. This parameter supports only the <code>name</code> property and the <code>eq</code>, <code>in</code>, or <code>contains</code> operators. If it contains multiple criteria, all the criteria are applied.</p>
guidedSelectionResponseId	<p>Type string</p> <p>Description Response identifier that stores user responses specified in the guided product selection window.</p>
includeCatalogDetails	<p>Type boolean</p> <p>Description Indicates whether catalog details must be included in the response (<code>true</code>) or not (<code>false</code>).</p>
orderBy	<p>Type string</p>

Input	Details
priceBookId	<p>Description Comma-delimited string of key-value pairs that specify how results are sorted. Each string must contain a field name and its sort order. For example, ["name:asc","custom_field:asc"].</p>
priceBookId	<p>Type string</p> <p>Description ID of the pricebook that the pricing information is retrieved from.</p>
pricingProcedure	<p>Type string</p> <p>Description API name of the pricing procedure to calculate product prices. If you don't specify a value, the pricing procedure selected on the Product Discovery Settings page is used.</p>
productClassificationId	<p>Type string</p> <p>Description ID of the product classification that's used to filter products.</p>
productCursor	<p>Type string</p> <p>Description Unique identifier that represents the position of the product from which the next set of results are retrieved.</p>
qualificationProcedure	<p>Type string</p> <p>Description API name of the qualification procedure to evaluate product eligibility. If you don't specify a value, the qualification procedure selected on the Product Discovery Settings page is used.</p>
recordLimit	<p>Type integer</p> <p>Description Maximum number of results to be returned in the response. Specify a value from 1 through 100. Default value is 10.</p>
relatedObjectFilters	<p>Type Apex-defined</p>

Input**Details****Description**

Collection of Apex runtime_industries_cpq.RelatedObjectFilterInputRepresentation records, each containing a related object and the filter criteria that's applied on the object.

searchTerms

Type

Apex-defined

Description

Collection of terms that are used to search products.

userContext

Type

Apex-defined

Description

An Apex ConnectApi.UserContextInputRepresentation record containing user information to evaluate product eligibility and calculate pricing.

Outputs**Output****Details**

apiStatusOutputRepresentation

Type

Apex-defined

Description

An Apex ApiStatusOutputRepresentation record that contains the status of the request, including the status code and message.

contextId

Type

string

Description

ID of the context that's created by using the specified context definition.

correlationId

Type

string

Description

Unique identifier attached to requests and messages, allowing reference to a specific transaction or event chain.

productCursor

Type

string

Output	Details
	<p>Description</p> <p>Unique identifier that represents the position of the product from which the next set of results are retrieved.</p>
productListOutputRepresentations	<p>Type</p> <p>Apex-defined</p> <p>Description</p> <p>Collection of Apex ProductListOutputRepresentation records that contain details about the product shown by the Guided Product Selection.</p>
recordOffset	<p>Type</p> <p>integer</p> <p>Description</p> <p>Number of catalog records to skip in the request. The default is 0.</p>
searchTerms	<p>Type</p> <p>Apex-defined</p> <p>Description</p> <p>Collection of terms that are used to search products.</p>
userContext	<p>Type</p> <p>Apex-defined</p> <p>Description</p> <p>An Apex ConnectApi.UserContextRepresentation record containing user information.</p>

Example

POST

Here's a sample input to call this invocable action.

```
{
  "inputs": [
    {
      "searchTerms": {
        "searchTerms": [
          {
            "term": "Laptop"
          }
        ]
      },
    },
    "categoryId": "0ZGxx0000000001GAA",
    "correlationId": "77f9dc6a-8ecc-44a3-8d89-4050179cc846",
    "additionalContextData": [
      {
```

```

        "nodeName": "Quote__c",
        "nodeData": {
            "id": "0Q0xx0000004CDsCAM",
            "businessObjectType": "Quote"
        }
    },
    "contextDefinition": "CategoryCD",
    "contextMapping": "ProductDiscoveryMapping",
    "enableQualification": true,
    "qualificationProcedure": "CatQual02",
    "userContext": {
        "accountId": "001xx000003GYiEAAW"
    }
}
]
}

```

Here's a sample input to call this invocable action from Apex code.

```

Invocable.Action action =
Invocable.Action.createStandardAction('searchPrdctWithGuidedSelection');

action.setInvocationParameter('correlationId', '77f9dc6a-8ecc-44a3-8d89-4050179cc846');
//action.setInvocationParameter('catalogId', '0ZSxx000000004sGAA');
action.setInvocationParameter('guidedSelectionResponseId', '0U3xx0000004CPACA2');
//action.setInvocationParameter('priceBookId', '01sxx0000005pyfAAA');
//action.setInvocationParameter('categoryId', '0ZGxx000000004rGAA');
action.setInvocationParameter('enableQualification', true);
action.setInvocationParameter('enablePricing', true);
//action.setInvocationParameter('contextDefinition', 'PDACDctx');
//action.setInvocationParameter('contextMapping', 'ProductDiscoveryMapping');
//action.setInvocationParameter('qualificationProcedure', 'PDQualProceWithQuote');
//action.setInvocationParameter('pricingProcedure', 'IconpricingProcedure');
action.setInvocationParameter('includeCatalogDetails', true);
action.setInvocationParameter('currencyCode', 'USD');
List<String> orderByInputs = new List<String>();
orderByInputs.add('name:asc');
orderByInputs.add('id:desc');
action.setInvocationParameter('orderBy', orderByInputs);
List<runtime_industries_cpq.GuidedSelectionSearchTerm> searchTerms = new
List<runtime_industries_cpq.GuidedSelectionSearchTerm>();
runtime_industries_cpq.GuidedSelectionSearchTerm searchTerm = new
runtime_industries_cpq.GuidedSelectionSearchTerm();
searchTerm.term = 'Laptop Basic Bundle';
List<String> tags = new List<String>();
tags.add('Laptop');
tags.add('Desktop');
searchTerm.tags = tags;
searchTerms.add(searchTerm);

runtime_industries_cpq.GuidedSelectionSearchTermList searchTermList = new
runtime_industries_cpq.GuidedSelectionSearchTermList();
searchTermList.searchTerms = searchTerms;
action.setInvocationParameter('searchTerms', searchTermList);

```

```
List<Invocable.Action.Result> results = action.invoke();
System.debug('Guided Selection result = ' + results);
```

Here's a sample response when you call this action.

```
[
  {
    "actionName": "searchPrdctWithGuidedSelection",
    "errors": null,
    "invocationId": null,
    "isSuccess": true,
    "outcome": null,
    "outputValues": {
      "productListOutputRepresentations": [
        {
          "unitOfMeasure": null,
          "status": null,
          "qualificationContext": {
            "reason": null,
            "isQualified": true
          },
          "productType": null,
          "productSpecificationType": {
            "productSpecificationRecordType": {
              "isCommercial": null
            },
            "name": "Commercial"
          },
          "productSellingModelOptions": [
            {
              "productSellingModelId": "0jPLT0000000YWL2A2",
              "productSellingModel": {
                "status": "Active",
                "sellingModelType": "OneTime",
                "pricingTermUnit": null,
                "pricingTerm": null,
                "name": "One Time",
                "id": "0jPLT0000000YWL2A2"
              },
              "productId": "01tLT000007DFaiYAO",
              "id": "0iOLT0000000n4j2AA"
            }
          ],
          "productRelatedComponent": null,
          "productQuantity": null,
          "productPricingInformation": null,
          "productInformation": null,
          "productComponentGroups": [],
          "productCode": "LBG001",
          "productClassification": {
            "id": null
          },
          "prices": [],
          "nodeType": "simpleProduct",
          "name": "Laptop Bag",
```

```

        "isSoldOnlyWithOtherProds": false,
        "isQuantityEditable": null,
        "isDefaultComponent": null,
        "isComponentRequired": null,
        "isAssetizable": true,
        "isActive": true,
        "id": "01tLT000007DFaiYAO",
        "endOfLifeDate": null,
        "displayUrl":
"https://gangslifestyle.com/cdn/shop/files/goldstorm-collegetravel-backpack-513.png?v=1706166408&width=1300",

        "discontinuedDate": null,
        "description": "Premium Laptop bag with separate compartments for laptop and
accessories.",
        "configureDuringSale": "NotAllowed",
        "childProducts": [],
        "categories": [
          {
            "sortOrder": null,
            "qualificationContext": {
              "reason": null,
              "isQualified": true
            },
            "parentCategoryId": null,
            "name": "Accessories",
            "isNavigational": null,
            "id": "0ZGLT000000JBsd4AG",
            "hasSubCategories": false,
            "description": null,
            "childCategories": null,
            "catalogId": "0ZSLT000000DUoI4AW"
          }
        ],
        "catalogs": [],
        "availabilityDate": null,
        "attributeCategories": [],
        "additionalFields": []
      }
    ],
    "searchTerms": [
      {
        "term": "Laptop Bag",
        "tags": []
      }
    ],
    "apiStatusOutputRepresentation": {
      "statusMessage": null,
      "statusCode": "FetchedDetailsSuccessfully",
      "messages": []
    },
    "correlationId": "77f9dc6a-8ecc-44a3-8d89-4050179cc846",
    "contextId": null,
    "recordOffset": 1
  },

```

```

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

```

Product Discovery Metadata API Types

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

[Flow for Product Discovery](#)

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

[ProductDiscoverySettings](#)

Represents the settings for Product Discovery.

Flow for Product Discovery

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

FlowActionCall

Product Discovery exposes additional `actionType` values for the `FlowActionCall` metadata type.

Field Name	Field Type	Description
<code>actionType</code>	InvokableActionType (enumeration of type string)	<p>Required.</p> <p>The action type. Additional valid values for Product Discovery are:</p> <ul style="list-style-type: none"> <code>findProducts</code>—Search for the products from a catalog, category, or subcategory by using the specified search term. <code>getProducts</code>—Get products from the specified catalog, category, or subcategory, including product qualification and pricing details. <code>getProductDetails</code>—Get details such as attributes, hierarchy, and cardinality for the specified product. <code>executeQualificationProcedure</code>—Execute a qualification procedure, which returns the qualification status for the specified products. <code>getCatalogDetails</code>—Get details of a catalog record. <code>getCatalogs</code>—Get a list of catalog records. <code>getCategories</code>—Get the list of categories associated with a catalog record. <code>getCategoryDetails</code>—Get details of a category record.

Field Name	Field Type	Description
		<ul style="list-style-type: none"> <code>getMultipleProductDetails</code>—Get product details for a list of products. <code>searchPrdctWithGuidedSelection</code>—Use guided product selection to search for products.

ProductDiscoverySettings

Represents the settings for Product Discovery.

Parent Type and Manifest Access

This type extends the [Metadata](#) metadata type and inherits its `fullName` field.

In the package manifest, all the settings metadata types for the org are accessed using the “Settings” name. See [Settings](#) for more details.

File Suffix and Directory Location

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

Version

`ProductDiscoverySettings` components are available in API version 62.0 and later.

Fields

Field Name	Description
<code>enableGuidedSelling</code>	<p>Field Type boolean</p> <p>Description Indicates whether guided product selection is enabled (<code>true</code>) or not (<code>false</code>). Using guided product selection, you can manage dynamic forms that assess user requirements and show relevant products. The default value is <code>false</code>. Available in API version 63.0 and later.</p>
<code>discoverProductsFlowNameOrgValue</code>	<p>Field Type string</p> <p>Description Name of the custom flow for browsing and adding products. If this field isn't specified, the Discover Products flow is used for browsing and adding products. Available in API version 63.0 and later.</p>

Field Name	Description
prodDiscBrowseContextDefOrgValue	<p>Field Type string</p> <p>Description Context definition that gets updated based on the user-selected options and provides summary data.</p>
prodDiscDefaultCatalogOrgValue	<p>Field Type string</p> <p>Description Default catalog that determines the products to be displayed on the product list page. Available in API version 64.0 and later.</p>
prodDiscPricingEnabledOrgValue	<p>Field Type string</p> <p>Description Indicates whether pricing is enabled (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
prodDiscProcedureOrgValue	<p>Field Type string</p> <p>Description Pricing procedure that calculates the list price.</p>
prodDiscQualEnabledOrgValue	<p>Field Type string</p> <p>Description Indicates whether product qualification is enabled (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
prodDiscQualificationOrgValue	<p>Field Type string</p> <p>Description Qualification procedure that determines product eligibility.</p>

Declarative Metadata Sample Definition

The following is an example of a ProductDiscoverySettings component.

```
<ProductDiscoverySettings xmlns="http://soap.sforce.com/2006/04/metadata">
  <enableGuidedSelling>true</enableGuidedSelling>

  <discoverProductsFlowNameOrgValue>revenue_products__DiscoverProducts</discoverProductsFlowNameOrgValue>

  <prodDiscPricingEnabledOrgValue>true</prodDiscPricingEnabledOrgValue>
</ProductDiscoverySettings>
```

```
<prodDiscQualEnabledOrgValue>true</prodDiscQualEnabledOrgValue>
<prodDiscProcedureOrgValue>PricingProcedure</prodDiscProcedureOrgValue>
<prodDiscQualificationOrgValue>QualificationProcedure</prodDiscQualificationOrgValue>

<prodDiscBrowseContextDefOrgValue>BrowseContextDefinition</prodDiscBrowseContextDefOrgValue>
</ProductDiscoverySettings>
```

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>ProductDiscovery</members>
    <name>Settings</name>
  </types>
  <version>65.0</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](#).

CHAPTER 4 Salesforce Pricing

In this chapter ...

- [Salesforce Pricing Standard Objects](#)
- [Salesforce Pricing Fields on Standard Objects](#)
- [Salesforce Pricing Business APIs](#)
- [Salesforce Pricing Apex Reference](#)
- [Salesforce Pricing Standard Invocable Actions](#)
- [Salesforce Pricing Metadata API Types](#)
- [Salesforce Pricing Tooling API Objects](#)

Create customized price adjustment methods and pricing procedures. Determine the discounts to apply to your products and services by using price adjustment methods. Get visibility into the pricing calculation process by using pricing procedures.

SEE ALSO:

[Salesforce Help: Permissions for Salesforce Pricing](#)

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions of Revenue Cloud where Salesforce Pricing is enabled

Salesforce Pricing Standard Objects

The Salesforce Pricing data model provides objects and fields to manage pricing processes, such as product management and calculation and application of discounts.

[AttributeAdjustmentCondition](#)

Represents the condition applied to an attribute that determines the price of a product or service being sold. This object is available in API version 60.0 and later.

[AttributeBasedAdjRule](#)

Represents the attribute conditions in a rule associated with the attribute based adjustment made for a product or service being sold. This object is available in API version 60.0 and later.

[AttributeBasedAdjustment](#)

Represents the association between the product selling model and the price adjustment for product or service being sold based on its attributes. This object stores information about the attributes that define the price of the product or service, the discounts applied, along with its value for a given date range. This object is available in API version 60.0 and later.

[AttributeDefinition](#)

Represents a product, asset, or object attribute, for example, a hardware specification or software detail. This object is available in API version 60.0 and later.

[BundleBasedAdjustment](#)

Represents the association between the product selling model and the price adjustment for a product or service being sold as a bundle. This object stores information of the product or service's price, the discounts applied, along with its value for a given date range. This object is available in API version 60.0 and later.

[CostBook](#)

Represents the cost book that contains multiple cost book entries. This object is available in API version 61.0 and later.

[ContractItemPrice](#)

Represents the price of a product on the contract. This object is available in API version 61.0 and later.

[CostBookEntry](#)

Represents the total cost of a product or service that's determined based on various factors that affect a product's price. For example, when a product is manufactured, the weight of the raw material can be a cost factor based on the amount of material required and its shipping cost. This object is available in API version 61.0 and later.

[PriceAdjustmentSchedule](#)

Represents a series of tiered discounts based on the number of items purchased. This object is available in API version 60.0 and later.

[PriceAdjustmentTier](#)

Represents a discount tier in a price adjustment schedule. This object is available in API version 60.0 and later.

[PriceBook2](#)

Represents a price book that contains the list of products that your org sells. This object is available in API version 60.0 and later.

[PriceBookEntry](#)

Represents a product entry (an association between a Pricebook2 and Product2) in a price book. This object is available in API version 60.0 and later.

[PriceBookEntryDerivedPrice](#)

Represents the price of a product that's derived from another source such as a product or an asset. This object is available in API version 61.0 and later.

[PriceRevisionPolicy](#)

Represents the guidelines and methods used to modify product or service prices, often incorporating formulas based on price revision entries and various adjustments. For example, a policy might dictate that prices are revised based on a formula that considers the regional Consumer Price Index (CPI) with a specific adjustment percentage, effective from a defined date, and categorized as either a flat adjustment or one directly based on the price revision entry data. This object is available in API version 65.0 and later.

[PricingAdjBatchJob](#)

Represents the collective update of multiple records on their prices and other adjustments. This object is available in API version 62.0 and later.

[PricingAdjBatchJobLog](#)

Represents the report that contains a list of failed adjustment requests along with an error message that describes the reason for failure. This object is available in API version 62.0 and later.

[PricingAPIExecution](#)

Represents the pricing resolution for an pricing element determined using strategy name and formula. This object is available in API version 63.0 and later.

[PricingProcedureResolution](#)

Represents a selection for a pricing procedure to execute a pricing process from a list of pricing procedures available. This object is available in API version 60.0 and later.

[PricingProcessExecution](#)

Represents a record generated during the execution of a discovery or pricing procedure. Multiple procedures may be performed within a single API call, with each recorded in a Pricing API Execution record. This object is available in API version 63.0 and later.

[ProductPriceHistoryLog](#)

Stores historical pricing data based on the product's price range. This object is available in API version 62.0 and later.

[ProductPriceRange](#)

Represents the price range of a product determined by using a product selling model that's stored in the relevant price book. This object is available in API version 62.0 and later.

[ProductSellingModel](#)

Defines one method by which a product can be sold; for example, as a one-time sale, an evergreen subscription, or a termed subscription. If the product is sold on subscription, this object defines the subscription's term. A product can have multiple product selling models. This object is available in API version 60.0 and later.

[ProductSellingModelDataTranslation](#)

Represents the translated values of the data stored within the ProductSellingModel record's fields. This object is available in API version 61.0 and later.

[ProductSellingModelOption](#)

A junction object between Product Selling Model and Product2. This object is available in API version 60.0 and later.

SEE ALSO:

[Object Reference for the Salesforce Platform: Overview of Salesforce Objects and Fields](#)

[SOAP API Developer Guide: Introduction to SOAP API](#)

AttributeAdjustmentCondition

Represents the condition applied to an attribute that determines the price of a product or service being sold. This object is available in API version 60.0 and later.

Supported Calls

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

Fields

Field	Details
<code>AttributeBasedAdjRuleId</code>	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Specifies the attribute adjustment rule record for which the condition is to be applied. This field is a relationship field.</p> <p>Relationship Name AttributeBasedAdjRule</p> <p>Relationship Type Lookup</p> <p>Refers To AttributeBasedAdjRule</p>
<code>AttributeDefinitionId</code>	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Specifies the attribute definition record for which the condition is to be applied. This field is a relationship field.</p> <p>Relationship Name AttributeDefinition</p> <p>Relationship Type Lookup</p> <p>Refers To AttributeDefinition</p>
<code>BooleanValue</code>	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the boolean value of the operator.</p>

Field	Details
	<p>Possible values are:</p> <ul style="list-style-type: none">• False• True
DateTimeValue	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date time value of the attribute.</p>
DateValue	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date value of the attribute.</p>
DoubleValue	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The double value of the attribute.</p>
IntegerValue	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The integer value of the attribute.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last referred to this record.</p>
LastViewedDate	<p>Type dateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Name of the attribute adjustment condition.</p>
Operator	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Operator used by the attribute. Possible values are:</p> <ul style="list-style-type: none"> • <code>doesnotexistin</code>—Does Not Exist In • <code>equals</code>—Equals • <code>existsin</code>—Exists In • <code>greaterorequal</code>—Greater Or Equal • <code>greaterthan</code>—Greater Than • <code>lessorequal</code>—Less Or Equal • <code>lessthan</code>—Less Than • <code>matches</code>—Matches • <code>notequals</code>—Not Equals <p>The default value is <code>equals</code>.</p>
ProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The ID of the product associated with the attribute adjustment condition. This field is a relationship field.</p> <p>Relationship Name Product</p>

Field	Details
	<p>Relationship Type Lookup</p> <p>Refers To Product2</p>
StringValue	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The string value of the attribute.</p>
UsageType	<p>Type picklist</p> <p>Properties Filter, Group, Restricted picklist, Sort</p> <p>Description The type of record where the attribute adjustment condition is used. Possible values are:</p> <ul style="list-style-type: none"> • Pricing • Rating

Associated Objects

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

[AttributeAdjustmentConditionFeed](#) on page 2171

Feed tracking is available for the object.

[AttributeAdjustmentConditionHistory](#) on page 2178

History is available for tracked fields of the object.

AttributeBasedAdjRule

Represents the attribute conditions in a rule associated with the attribute based adjustment made for a product or service being sold. 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
AttributeCount	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The number of attributes.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date the attribute based adjustment rule was last referenced.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Name of the attribute based adjustment rule.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the owner of the attribute based adjustment rule. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p>

Field	Details
	Refers To Group, User
UsageType	Type picklist Properties Create, Filter, Group, Restricted picklist, Sort, Update Description The type of record where the attribute-based adjustment rule is used. Possible values are: <ul style="list-style-type: none"> • Pricing • Rating

Associated Objects

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

[AttributeBasedAdjRuleFeed on page 2171](#)

Feed tracking is available for the object.

[AttributeBasedAdjRuleHistory on page 2178](#)

History is available for tracked fields of the object.

[AttributeBasedAdjRuleShare on page 2182](#)

Sharing is available for the object.

AttributeBasedAdjustment

Represents the association between the product selling model and the price adjustment for product or service being sold based on its attributes. This object stores information about the attributes that define the price of the product or service, the discounts applied, along with its value for a given date range. 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
AdjustmentType	Type picklist

Field	Details
	<p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The type of pricing adjustment being made.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Amount • Override • Percentage
AdjustmentValue	<p>Type double</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The value of the adjustment being made based on the adjustment type.</p>
AttributeBasedAdjRuleId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The attribute based adjustment rule associated with this attribute based adjustment record. This field is a relationship field.</p> <p>Relationship Name AttributeBasedAdjRule</p> <p>Relationship Type Lookup</p> <p>Refers To AttributeBasedAdjRule</p>
AttributeCount	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The number of attributes.</p>
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p>

Field	Details
	<p>Description</p> <p>ISO code of the currency. Must be one of the valid alphabetic, three-letter currency ISO codes defined by the ISO 4217 standard, such as USD, GBP, or JPY. Must be unique within your organization.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • BHD—Bahraini Dinar • JPY—Japanese Yen • USD—U.S. Dollar <p>The default value is USD.</p>
EffectiveFrom	<p>Type</p> <p>dateTime</p> <p>Properties</p> <p>Create, Filter, Sort, Update</p> <p>Description</p> <p>The date and time when the price list entry comes into effect.</p>
EffectiveTo	<p>Type</p> <p>dateTime</p> <p>Properties</p> <p>Create, Filter, Nillable, Sort, Update</p> <p>Description</p> <p>The date and time till when the price list entry remains effective.</p>
LastReferencedDate	<p>Type</p> <p>dateTime</p> <p>Properties</p> <p>Filter, Nillable, Sort</p> <p>Description</p> <p>The date the attribute based adjustment was last referenced.</p>
LastViewedDate	<p>Type</p> <p>dateTime</p> <p>Properties</p> <p>Filter, Nillable, Sort</p> <p>Description</p> <p>The timestamp for when the current user last viewed a record related to this record.</p>
Name	<p>Type</p> <p>string</p>

Field	Details
	<p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Name of the attribute based adjustment.</p>
PriceAdjustmentScheduleId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The price adjustment schedule associated with the attribute based adjustment record. This field is a relationship field.</p> <p>Relationship Name PriceAdjustmentSchedule</p> <p>Relationship Type Lookup</p> <p>Refers To PriceAdjustmentSchedule</p>
PricingTerm	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The number of pricing term units in the pricing term. Used with PricingTermUnit to define the length of the pricing term. For example, if PricingTermUnit is Months and this field is 1, the subscription is priced monthly.If the selling model is one-time, this field must be null.</p>
PricingTermUnit	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description The unit of time used to define the pricing term. Used with PricingTerm to define the length of the pricing term. For example, if this field is Months and PricingTerm is 1, the subscription is priced monthly. If the selling model is one-time, this field must be null. Possible values are:</p> <ul style="list-style-type: none"> • Annual—Years • Months • Quarterly • Semi-Annual

Field	Details
ProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The ID of the product associated with the product attribute set. This field is a relationship field.</p> <p>Relationship Name Product</p> <p>Relationship Type Lookup</p> <p>Refers To Product2</p>
ProductSellingModelId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort</p> <p>Description The ID of the ProductSellingModel record associated with this attribute based adjustment record. This field is a relationship field.</p> <p>Relationship Name ProductSellingModel</p> <p>Relationship Type Lookup</p> <p>Refers To ProductSellingModel</p>
SellingModelType	<p>Type picklist</p> <p>Properties Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Indicates whether the product is sold as a one-time sale, an evergreen subscription, or a subscription with a defined term. Possible values are:</p> <ul style="list-style-type: none"> • Evergreen • OneTime—One Time • TermDefined—Term-Defined

Field	Details
	The default value is <code>OneTime</code> .

Associated Objects

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

[AttributeBasedAdjustmentFeed](#) on page 2171

Feed tracking is available for the object.

[AttributeBasedAdjustmentHistory](#) on page 2178

History is available for tracked fields of the object.

AttributeDefinition

Represents a product, asset, or object attribute, for example, a hardware specification or software detail. 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
Code	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description Code for the attribute definition. This field is unique within your organization.</p>
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Available only if the multicurrency feature is enabled. Contains the ISO code for any currency allowed by the organization.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • BHD—Bahraini Dinar • JPY—Japanese Yen

Field	Details
	<ul style="list-style-type: none"> • USD—U.S. Dollar <p>The default value is USD.</p>
DataType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort</p> <p>Description The data type of the attribute definition.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Checkbox • Currency • Date • Datetime • Multipicklist • Number • Percent • Picklist • Text
DefaultHelpText	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The default help text for this attribute.</p>
DefaultValue	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The default value for this attribute.</p>
Description	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description Description of this attribute.</p>

Field	Details
DeveloperName	<p>Type string</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The unique name of the attribute definition record. This name must begin with a letter and use only alphanumeric characters and underscores. It can't include spaces, end with an underscore, or have two consecutive underscores.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates that the attribute definition is active. Active attributes definitions can be selected for products. The default value is <code>false</code>.</p>
IsRequired	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the attribute definition is required for a product. The default value is <code>false</code>.</p>
Label	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The label for the attribute.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date the attribute definition was last referenced.</p>

Field	Details
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date the attribute definition was last viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the attribute.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The owner of the attribute definition. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
PicklistId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort</p> <p>Description The ID of the attribute picklist with the valid values for this attribute. This field is a relationship field.</p> <p>Relationship Name Picklist</p> <p>Relationship Type Lookup</p> <p>Refers To AttributePicklist</p>

Field	Details
SourceSystemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The identifier of the attribute definition in an external system.</p>
ValueDescription	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The default value description for this attribute.</p>

Associated Objects

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

[AttributeDefinitionFeed](#) on page 2171

Feed tracking is available for the object.

[AttributeDefinitionHistory](#) on page 2178

History is available for tracked fields of the object.

[AttributeDefinitionShare](#) on page 2182

Sharing is available for the object.

BundleBasedAdjustment

Represents the association between the product selling model and the price adjustment for a product or service being sold as a bundle. This object stores information of the product or service's price, the discounts applied, along with its value for a given date range. 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
AdjustmentType	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The type of pricing adjustment being made.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Amount • Override • Percentage
AdjustmentValue	<p>Type double</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The type of pricing adjustment being made.</p>
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description ISO code of the currency. Must be one of the valid alphabetic, three-letter currency ISO codes defined by the ISO 4217 standard, such as USD, GBP, or JPY. Must be unique within your organization.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • BHD—Bahraini Dinar • JPY—Japanese Yen • USD—U.S. Dollar <p>The default value is USD.</p>
EffectiveFrom	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The date and time when the bundle based adjustment comes into effect.</p>
EffectiveTo	<p>Type dateTime</p>

Field	Details
	<p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time till when the bundle based adjustment remains effective.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date the bundle based adjustment was last referenced.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date the bundle based adjustment was last viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the bundle based adjustment record.</p>
ParentProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Represents the immediate parent in the product bundle that the price is configured for. This field is a relationship field.</p> <p>Relationship Name ParentProduct</p> <p>Relationship Type Lookup</p> <p>Refers To Product2</p>

Field	Details
ParentProductSellingModelId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort</p> <p>Description The immediate parent node of a product selling model when nodes are represented in a hierarchial structure. This field is a relationship field.</p> <p>Relationship Name ParentProductSellingModel</p> <p>Relationship Type Lookup</p> <p>Refers To ProductSellingModel</p>
PriceAdjustmentScheduleId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The price adjustment schedule associated with the bundle based adjustment record. This field is a relationship field.</p> <p>Relationship Name PriceAdjustmentSchedule</p> <p>Relationship Type Lookup</p> <p>Refers To PriceAdjustmentSchedule</p>
PricingTerm	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The number of pricing term units in the pricing term. Used with PricingTermUnit to define the length of the pricing term. For example, if PricingTermUnit is Months and this field is 1, the subscription is priced monthly.If the selling model is one-time, this field must be null.</p>
PricingTermUnit	<p>Type picklist</p>

Field	Details
	<p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description The unit of time used to define the pricing term. Used with PricingTerm to define the length of the pricing term. For example, if this field is Months and PricingTerm is 1, the subscription is priced monthly. If the selling model is one-time, this field must be null.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Annual—Years • Months • Quarterly • Semi—Annual
ProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The ID of the product associated with the product bundle set. This field is a relationship field.</p> <p>Relationship Name Product</p> <p>Relationship Type Lookup</p> <p>Refers To Product2</p>
ProductSellingModelId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort</p> <p>Description The ID of the ProductSellingModel record associated with this bundle based adjustment record. This field is a relationship field.</p> <p>Relationship Name ProductSellingModel</p> <p>Relationship Type Lookup</p> <p>Refers To ProductSellingModel</p>

Field	Details
RootBundleId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Represents the structural root product in a product's bundle that the price is configured for. This field is a relationship field.</p> <p>Relationship Name RootBundle</p> <p>Relationship Type Lookup</p> <p>Refers To Product2</p>
RootProductSellingModelId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort</p> <p>Description The root product selling model. The primary or base product selling method. This field is a relationship field.</p> <p>Relationship Name RootProductSellingModel</p> <p>Relationship Type Lookup</p> <p>Refers To ProductSellingModel</p>
SellingModelType	<p>Type picklist</p> <p>Properties Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Indicates whether the product is sold as a one-time sale, an evergreen subscription, or a subscription with a defined term. Possible values are:</p> <ul style="list-style-type: none"> • Evergreen • OneTime—One Time • TermDefined—Term-Defined <p>The default value is OneTime.</p>

Associated Objects

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

BundleBasedAdjustmentFeed on page 2171

Feed tracking is available for the object.

BundleBasedAdjustmentHistory on page 2178

History is available for tracked fields of the object.

CostBook

Represents the cost book that contains multiple cost book entries. 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
EffectiveFrom	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description Date and time when the cost book comes into effect.</p>
EffectiveTo	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Date and time till when the cost book is no longer in effect.</p>
IsDefault	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the cost book is default (<code>true</code>) or not (<code>false</code>). The default value is <code>true</code>.</p>

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp for when the current user last referred to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp for when the current user last viewed a record related to this record.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Name of the cost book.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the user who created the record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>

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.

[CostBookFeed](#) on page 2171

Feed tracking is available for the object.

CostBookHistory on page 2178

History is available for tracked fields of the object.

CostBookShare on page 2182

Sharing is available for the object.

ContractItemPrice

Represents the price of a product on the contract. 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()`, `undelete()`, `update()`, `upsert()`

Fields

Field	Details
ContractId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The contract record associated with this contract item price record. This field is a relationship field.</p> <p>Relationship Name Contract</p> <p>Relationship Type Master-detail</p> <p>Refers To Contract (the master object)</p>
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Defaulted on create, Filter, Group, Restricted picklist, Sort</p> <p>Description Contains the ISO code for any currency allowed by the organization. Available only if the multicurrency feature is enabled. Valid value is:</p> <ul style="list-style-type: none"> • USD—U.S. Dollar

Field	Details
	The default value is USD.
DiscountType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The unit of the discount. Valid values are:</p> <ul style="list-style-type: none"> • AdjustmentAmount • AdjustmentPercentage
DiscountValue	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The value of the discount.</p>
EndDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time till when the contract item price is no longer in effect.</p>
ItemId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The ID of the line item record associated with this contract item price record. This field is a polymorphic relationship field.</p> <p>Relationship Name Item</p> <p>Relationship Type Lookup</p> <p>Refers To Product2, ProductCategory</p>

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last referred to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the contract item price record.</p>
Price	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The unit price of the product that's being sold as part of the contract.</p>
ProductSellingModelId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the product selling model record associated with this contract item price record. This field is a relationship field.</p> <p>Relationship Name ProductSellingModel</p> <p>Relationship Type Lookup</p> <p>Refers To ProductSellingModel</p>

Field	Details
SellingModelType	<p>Type picklist</p> <p>Properties Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Specifies whether the line item is sold as a one-time sale, an evergreen subscription, or a subscription with a defined term.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • Evergreen • OneTime • TermDefined <p>The default value is OneTime.</p>
StartDate	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The date and time when the contract item price comes into effect.</p>

Associated Objects

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

[ContractItemPriceFeed](#) on page 2171


Feed tracking is available for the object.

[ContractItemPriceHistory](#) on page 2178

History is available for tracked fields of the object.

CostBookEntry

Represents the total cost of a product or service that's determined based on various factors that affect a product's price. For example, when a product is manufactured, the weight of the raw material can be a cost factor based on the amount of material required and its shipping cost. 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()`, `undelete()`, `update()`, `upsert()`

Fields

Field	Details
Cost	<p>Type currency</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description Total cost of the product.</p>
CostBookId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description ID of the Cost Book record with which this record is associated. This field is a relationship field.</p> <p>Relationship Name CostBook</p> <p>Relationship Type Master-detail</p> <p>Refers To CostBook (the master object)</p>
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description ISO code for any currency allowed by the organization. Available only for organizations with the multicurrency feature enabled. Valid values are:</p> <ul style="list-style-type: none"> • BHD—Bahraini Dinar • JPY—Japanese Yen • USD—U.S. Dollar <p>The default value is USD.</p>
Description	<p>Type textarea</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description Description of this cost book entry record.</p>
EffectiveFrom	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description Date and time when the cost book entry comes into effect.</p>
EffectiveTo	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Date and time till when the cost book entry is no longer in effect.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp for when the current user last referred to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp for when the current user last viewed a record related to this record.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Name of the cost book entry.</p>
ProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p>

Field	Details
	<p>Description Required. ID of the Product2 record with which this record is associated. This field must be specified when creating Product2 records. This field can't be changed in an update.</p> <p>This field is a relationship field.</p> <p>Relationship Name Product</p> <p>Relationship Type Lookup</p> <p>Refers To Product2</p>

Associated Objects

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

[CostBookEntryFeed on page 2171](#)

Feed tracking is available for the object.

[CostBookEntryHistory on page 2178](#)

History is available for tracked fields of the object.

PriceAdjustmentSchedule

Represents a series of tiered discounts based on the number of items purchased. 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
AdjustmentMethod	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The method for applying tiered pricing. Possible values are:</p> <ul style="list-style-type: none"> • Range—All items receive the discount of the highest tier the quantity falls in. • Slab—Items receive the discount defined for the tier they fall in.

Field	Details
	<p>Possible values are:</p> <ul style="list-style-type: none"> • Range • Slab <p>The default value is Range.</p>
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Available only if the multicurrency feature is enabled. Contains the ISO code for any currency allowed by the organization.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • BHD—Bahraini Dinar • JPY—Japanese Yen • USD—U.S. Dollar <p>The default value is USD.</p>
Description	<p>Type textarea</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Text description of the price adjustment schedule.</p>
EffectiveFrom	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the price adjustment schedule comes into effect.</p>
EffectiveTo	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the price adjustment schedule remains effective.</p>
IsActive	<p>Type boolean</p>

Field	Details
	<p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the price adjustment schedule is active (true) or not (false). You can change this field's value as often as necessary. Label is Active. Default value is <i>False</i>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Indicates whether the price adjustment schedule has been archived (true) or not (false). This field is read-only.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>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.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Required. The name of the price adjustment schedule. This field is read-only. Label is Price Adjustment Schedule Name.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The Salesforce ID of the sales representative who owns the price adjustment schedule. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p>

Field	Details
	<p>Refers To Group, User</p>
Pricebook2Id	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The price book associated with this price adjustment schedule record. This field is a relationship field.</p> <p>Relationship Name Pricebook2</p> <p>Relationship Type Lookup</p> <p>Refers To Pricebook2</p>
ScheduleType	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The type of price adjustment schedule. Possible values are:</p> <ul style="list-style-type: none"> • Attribute • Bundle • Custom • Term • Volume <p>The default value is volume.</p>

Associated Objects

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

[PriceAdjustmentScheduleShare](#) on page 2182

Sharing is available for the object.

PriceAdjustmentTier

Represents a discount tier in a price adjustment schedule. This object is available in API version 60.0 and later.

Supported Calls

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

Fields

Field	Details
AdjustmentType	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The type of price adjustment.</p>
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Available only if the multicurrency feature is enabled. Contains the ISO code for any currency allowed by the organization.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • BHD—Bahraini Dinar • JPY—Japanese Yen • USD—U.S. Dollar <p>The default value is USD.</p>
EffectiveFrom	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the price adjustment tier comes into effect.</p>
EffectiveTo	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p>

Field	Details
	<p>Description The date and time when the price adjustment tier remains effective.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Indicates when the user last referred to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>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.</p>
LowerBound	<p>Type double</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The minimum quantity the discount can be applied to. It must be a positive integer and less than or equal to the upper bound of the tier.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the price adjustment tier.</p>
PriceAdjustmentScheduleId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The ID of the price adjustment schedule that the discount is applied to. This field is a relationship field.</p>

Field	Details
	<p>Relationship Name PriceAdjustmentSchedule</p> <p>Relationship Type Lookup</p> <p>Refers To PriceAdjustmentSchedule</p>
PricingTerm	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The number of pricing term units in the pricing term. Used with PricingTermUnit to define the length of the pricing term. For example, if PricingTermUnit is Months and this field is 1, the subscription is priced monthly.If the selling model is one-time, this field must be null.</p>
PricingTermUnit	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description The unit of time used to define the pricing term. Used with PricingTerm to define the length of the pricing term. For example, if this field is Months and PricingTerm is 1, the subscription is priced monthly. If the selling model is one-time, this field must be null.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Annual—Years • Months
Product2Id	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the product associated with the price adjustment tier. This field is a relationship field.</p> <p>Relationship Name Product2</p> <p>Relationship Type Lookup</p> <p>Refers To Product2</p>

Field	Details
ProductSellingModelId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the ProductSellingModel record associated with this price adjustment tier record. This field is a relationship field.</p> <p>Relationship Name ProductSellingModel</p> <p>Relationship Type Lookup</p> <p>Refers To ProductSellingModel</p>
SellingModelType	<p>Type picklist</p> <p>Properties Defaulted on create, Filter, Group, Restricted picklist, Sort</p> <p>Description Indicates whether the product is sold as a one-time sale, an evergreen subscription, or a subscription with a defined term. Possible values are:</p> <ul style="list-style-type: none"> • Evergreen • OneTime—One Time • TermDefined—Term-Defined <p>The default value is OneTime.</p>
TierType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The unit of the discount. Possible values are:</p> <ul style="list-style-type: none"> • AdjustmentAmount—An amount discounted from an item's list price • AdjustmentPercentage—A percentage discounted from an item's list price <p>Possible values are:</p> <ul style="list-style-type: none"> • AdjustmentAmount—Amount • AdjustmentPercentage—Percentage • OverrideAmount—Override

Field	Details
TierValue	<p>Type double</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The value of the discount.</p>
UpperBound	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The maximum quantity the discount can be applied to. Must be a positive integer. Not inclusive. Set this value one digit higher than the quantity you want the tier to include. For example, if a tier's upper bound is 99, set the value of UpperBound to 100. For the last tier, the value is optional.</p>

Usage

To use PriceAdjustmentTiers, associate them with a PriceAdjustmentSchedule.

Tiers can't overlap, and no gaps are allowed between tiers.

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.

PriceAdjustmentTierFeed on page 2171

Feed tracking is available for the object.

PriceAdjustmentTierHistory on page 2178

History is available for tracked fields of the object.

PriceBook2

Represents a price book that contains the list of products that your org sells. 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
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Available only if the multicurrency feature is enabled. Contains the ISO code for any currency allowed by the organization.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • BHD—Bahraini Dinar • JPY—Japanese Yen • USD—U.S. Dollar <p>The default value is USD.</p>
Description	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Text description of the price book.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the price book is active (true) or not (false). Inactive price books are hidden in many areas in the user interface. You can change this field's value as often as necessary. Label is Active.</p> <p>The default value is <code>false</code>.</p>
IsArchived	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates whether the price book has been archived (true) or not (false). This field is read only.</p> <p>The default value is <code>false</code>.</p>

Field	Details
IsStandard	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates whether the price book is the standard price book for the org (true) or not (false). Every org has one standard price book—all other price books are custom price books. The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>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.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Required. Name of this object. This field is read-only for the standard price book.</p>
ValidFrom	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when a price book is initially valid. If this field is null, the price book is valid immediately when active.</p>
ValidTo	<p>Type dateTime</p>

Field	Details
	<p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when a price book is valid to. If this field is null, the price book is valid until it's deactivated.</p>

Usage

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

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

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

Associated Objects

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

[PriceBook2ChangeEvent](#) on page 2169

Change events are available for the object.

[PriceBook2History](#) on page 2178

History is available for tracked fields of the object.


PriceBookEntry

Represents a product entry (an association between a Pricebook2 and Product2) in a price book. This object is available in API version 60.0 and later.

Supported Calls

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

Fields

-  **Note:** Salesforce Object Search Language (SOSL) allows you to search records across standard and custom objects. When filtering records in the PriceBookEntry object using SOSL, you can only sort by fields related to Product2.

Field	Details
ActivePriceAdjustmentQuantity	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The count of active price adjustment schedules associated with the price book entry.</p>
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort</p> <p>Description Available only for organizations with the multicurrency feature enabled. Contains the ISO code for any currency allowed by the organization.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • BHD—Bahraini Dinar • JPY—Japanese Yen • USD—U.S. Dollar <p>The default value is <code>USD</code>.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether this price book entry is active (true) or not (false). Although you can never delete PricebookEntry records, your client application can set this flag to false. Inactive PricebookEntry records are hidden in many areas in the user interface. You can change this flag on a PricebookEntry record as often as necessary.</p> <p>The default value is <code>false</code>.</p>
IsArchived	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates whether the PricebookEntry has been archived (true) or not (false). This field is set to true when the Product2 record it's associated with is archived, or when the Pricebook2 record is archived. This field is read only.</p> <p>The default value is <code>false</code>.</p>

Field	Details
IsDerived	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates whether the product's price was derived (yes) or not (no). The default value is <code>false</code>.</p>
Name	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Name of this price book entry record. This read-only field references the value in the Name field of the Product2 record.</p>
Pricebook2Id	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Required. ID of the Pricebook2 record with which this record is associated. This field must be specified when creating Pricebook2 records. It can't be changed in an update. This field is a relationship field.</p> <p>Relationship Name Pricebook2</p> <p>Relationship Type Lookup</p> <p>Refers To Pricebook2</p>
Product2Id	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Required. ID of the Product2 record with which this record is associated. This field must be specified when creating Product2 records. It can't be changed in an update. This field is a relationship field.</p> <p>Relationship Name Product2</p>

Field	Details
	<p>Relationship Type Lookup</p> <p>Refers To Product2</p>
ProductCode	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Product code for this record. This read-only field references the value in the ProductCode field of the associated Product2 record.</p>
ProductSellingModelId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort</p> <p>Description The ID of the related product selling model. This field is a relationship field.</p> <p>Relationship Name ProductSellingModel</p> <p>Relationship Type Lookup</p> <p>Refers To ProductSellingModel</p>
UnitPrice	<p>Type currency</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description Required. Unit price for this price book entry. You can specify a value only if UseStandardPrice is set to false.</p>
UseStandardPrice	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description</p> <p>Indicates whether this price book entry uses the standard price defined in the standard Pricebook2 record (true) or not (false). If set to true, then the UnitPrice field is read-only, and the value is the same as the UnitPrice value in the corresponding PricebookEntry in the standard price book (that is, the PricebookEntry record whose Pricebook2Id refers to the standard price book and whose Product2Id and CurrencyIsoCode are the same as this record). For PricebookEntry records associated with the standard Pricebook2 record, this field must be set to true.</p> <p>The default value is <code>false</code>.</p>

Usage

Use this object to define the association between your organization's products (Product2) and your organization's standard price book or to custom price books (Pricebook2). Create one PricebookEntry record for each standard or custom price and currency combination for a product in a Pricebook2.

When creating these records, you must specify the IDs of the associated Pricebook2 record and Product2 record. Once these records are created, your client application can't update these IDs.

This object is defined only for those organizations that have products enabled as a feature. If the organization doesn't have the products feature enabled, then the PricebookEntry object doesn't appear in the describeGlobal call, and you can't access it.

If you delete a PriceBookEntry that is referenced by a line item, the line item is unaffected, but the PriceBookEntry is archived and unavailable from the API. Deleted PriceBookEntry records can't be recovered.

You must load the standard price for a product before you're permitted to load its custom prices.

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.

PriceBookEntryChangeEvent on page 2169

Change events are available for the object.

PriceBookEntryHistory on page 2178

History is available for tracked fields of the object.

PriceBookEntryDerivedPrice

Represents the price of a product that's derived from another source such as a product or 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()`

Fields

Field	Details
ContributingProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort</p> <p>Description Source product from which the derived price is calculated. The source product is associated with the derived price product. This field is a relationship field.</p> <p>Relationship Name ContributingProduct</p> <p>Relationship Type Lookup</p> <p>Refers To Product2</p>
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description ISO code for any currency allowed by the organization. Available only if the multicurrency feature is enabled. Valid values are:</p> <ul style="list-style-type: none"> • BHD—Bahraini Dinar • JPY—Japanese Yen • USD—U.S. Dollar <p>The default value is USD.</p>
DerivedPricingScope	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Scope of the product based on which the derived price is calculated. Valid values are:</p> <ul style="list-style-type: none"> • Both • NonTransactional • Transactional

Field	Details
EffectiveFrom	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description Date and time when the derived pricing comes into effect.</p>
EffectiveTo	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Date and time when the derived pricing is no longer in effect.</p>
Formula	<p>Type string</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description Coded format of the formula used to calculate the derived price of a product from another product or asset.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp for when the current user last referred to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (<code>LastReferencedDate</code>) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p>

Field	Details
	<p>Description Name of the derived price record.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the user who created the record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
PricebookEntryId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Price book entry associated with the source product. This field is a relationship field.</p> <p>Relationship Name PricebookEntry</p> <p>Relationship Type Lookup</p> <p>Refers To PricebookEntry</p>
PricebookId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort</p> <p>Description Price book associated with the source product. This field is a relationship field.</p> <p>Relationship Name Pricebook</p>

Field	Details
	<p>Relationship Type Lookup</p> <p>Refers To Pricebook2</p>
PricingSource	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Pricing type used to calculate the derived price of the product. Valid values are:</p> <ul style="list-style-type: none"> • Header • Product
ProductId	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description Product associated with the derived pricing. This field is a relationship field.</p> <p>Relationship Name Product</p> <p>Relationship Type Lookup</p> <p>Refers To Product2</p>
ProductSellingModelId	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description Product selling model associated with this record. This field is a relationship field.</p> <p>Relationship Name ProductSellingModel</p> <p>Relationship Type Lookup</p>

Field	Details
	Refers To ProductSellingModel

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.

PriceBookEntryDerivedPriceFeed on page 2171

Feed tracking is available for the object.

PriceBookEntryDerivedPriceHistory on page 2178

History is available for tracked fields of the object.

PriceBookEntryDerivedPriceShare on page 2182

Sharing is available for the object.

PriceRevisionPolicy

Represents the guidelines and methods used to modify product or service prices, often incorporating formulas based on price revision entries and various adjustments. For example, a policy might dictate that prices are revised based on a formula that considers the regional Consumer Price Index (CPI) with a specific adjustment percentage, effective from a defined date, and categorized as either a flat adjustment or one directly based on the price revision entry data. 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
EffectiveFrom	Type date Properties Create, Filter, Group, Sort, Update Description The date and time when the price revision policy comes into effect.
EffectiveTo	Type date Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	<p>Description The date and time when the price revision policy is no longer in effect.</p>
Formula	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The coded format of the formula used to calculate the revised price of a product from a quote and order, or contract.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>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.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the price revision policy.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the user who created the record. This field is a polymorphic relationship field.</p>

Field	Details
	<p>Relationship Name Owner</p> <p>Refers To Group, User</p>
PolicyType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The type of price revision policy. Possible values are:</p> <ul style="list-style-type: none"> • Flat • PriceIndex—Price Index
Region	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The region where the price revision policy is valid.</p>

Associated Objects

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

[PriceRevisionPolicyFeed](#) on page 2171

Feed tracking is available for the object.

[PriceRevisionPolicyHistory](#) on page 2178

History is available for tracked fields of the object.

[PriceRevisionPolicyShare](#) on page 2182

Sharing is available for the object.

PricingAdjBatchJob

Represents the collective update of multiple records on their prices and other adjustments. 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
EffectiveFrom	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the updated value can be considered for a pricing adjustment batch job.</p>
EffectiveTo	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time until when the updated value is effective and can be considered for a pricing adjustment batch job.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Indicates whether the pricing adjustment batch job has been archived (<code>true</code>) or not (<code>false</code>). This field is read-only.</p>
LastTriggeredDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the pricing adjustment batch job was last triggered.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	<p>Description</p> <p>The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (<code>LastReferencedDate</code>) and not viewed.</p>
Name	<p>Type</p> <p>string</p> <p>Properties</p> <p>Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description</p> <p>The name of the pricing adjustment batch job.</p>
OwnerId	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description</p> <p>The Salesforce ID of the sales representative who owns the pricing procedure resolution.</p> <p>This field is a polymorphic relationship field.</p> <p>Relationship Name</p> <p>Owner</p> <p>Refers To</p> <p>Group, User</p>
ProcessedRecordsCount	<p>Type</p> <p>long</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p>Description</p> <p>The total number of records that were successfully updated.</p>
RecordCount	<p>Type</p> <p>long</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p>Description</p> <p>The total number of records that have been processed.</p>
RecordList	<p>Type</p> <p>textarea</p> <p>Properties</p> <p>Create</p>

Field	Details
	<p>Description The list of record IDs eligible for a pricing adjustment batch job.</p>
ShouldSkipBulkRetry	<p>Type boolean</p> <p>Properties Create, Filter, Group, Nillable, Sort</p> <p>Description For internal use only.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The processing status of the pricing adjustment batch job. Valid values are:</p> <ul style="list-style-type: none"> Completed Failed InProgress New PartiallyCompleted Rerun
TargetObject	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort</p> <p>Description The target object of the pricing adjustment batch job. Valid values are:</p> <ul style="list-style-type: none"> AttributeBasedAdjustment BundleBasedAdjustment PriceAdjustmentTier PricebookEntry
UpdateType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p>

Field	Details
	<p>Description</p> <p>The type of update being made by the pricing adjustment batch job.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • Amount • Override • Percentage
UpdateValue	<p>Type</p> <p>double</p> <p>Properties</p> <p>Create, Filter, Sort, Update</p> <p>Description</p> <p>The numerical value of the update.</p>

Usage

To execute a pricing adjustment batch job through an API request, make a POST request to the `/services/data/v65.0/objects/PricingAdjBatchJob` resource. Here's a sample request payload.

```
{
  "TargetObject": "PriceAdjustmentTier",
  "UpdateType": "Amount",
  "UpdateValue": "10",
  "RecordList": "84YDU00000010ig2AA,84YDU00000010ig2AB,84YDU00000010ig2AC",
  "EffectiveFrom": "2024-08-01T10:07:09.000+0000",
  "EffectiveTo": "2024-08-05T10:07:09.000+0000"
}
```

You can specify a comma-separated list of record IDs that are eligible for a pricing adjustment batch job.

To rerun a pricing adjustment batch job, make a PATCH request to the `/services/data/v65.0/objects/PricingAdjBatchJob/pricingAdjBatchJobID` resource. Here's a sample request payload.

```
{
  "Status": "Rerun"
}
```

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.

[PricingAdjBatchJobFeed on page 2171](#)

Feed tracking is available for the object.

[PricingAdjBatchJobHistory on page 2178](#)


History is available for tracked fields of the object.

PricingAdjBatchJobShare on page 2182

Sharing is available for the object.

PricingAdjBatchJobLog

Represents the report that contains a list of failed adjustment requests along with an error message that describes the reason for failure. This object is available in API version 62.0 and later.

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

Supported Calls

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

Fields

Field	Details
AdjustedValue	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The adjusted value of a record. The stored value is used even if another pricing adjustment batch job is triggered again.</p>
EffectiveFrom	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the failed versioned record is generated. This is only applicable for Price Adjustment records.</p>
EffectiveTo	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time until when the failed versioned record is available. This is applicable only for Price Adjustment records.</p>

Field	Details
ErrorCode	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The error code for the failure during the record update process.</p>
ErrorMessage	<p>Type textarea</p> <p>Properties Create, Update</p> <p>Description The error message that's generated for the failure during the record update process.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Indicates whether the pricing adjustment batch job has been archived (<code>true</code>) or not (<code>false</code>). This field is read-only.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>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 (<code>LastReferencedDate</code>) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Required. The name of the pricing adjustment batch job.</p>
PricingAdjBatchJobId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p>

Field	Details
	<p>Description The pricing adjustment batch job associated with the pricing adjustment batch job log. This field is a relationship field.</p> <p>Relationship Name PricingAdjBatchJob</p> <p>Relationship Type Master-detail</p> <p>Refers To PricingAdjBatchJob (the master object)</p>
TargetRecord	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The ID of the record for which a pricing adjustment error was generated.</p>

Associated Objects

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

[PricingAdjBatchJobLogFeed](#)

Feed tracking is available for the object.

[PricingAdjBatchJobLogHistory](#) on page 2178

History is available for tracked fields of the object.

PricingAPIExecution

Represents the pricing resolution for an pricing element determined using strategy name and formula. 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
ApiEndpoint	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The unique API endpoint that is called.</p>
ApiType	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies the API type of the pricing API execution. Possible values are:</p> <ul style="list-style-type: none"> • NGP <p>The default value is NGP.</p>
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Available only if the multicurrency feature is enabled. Contains the ISO code for any currency allowed by the organization. Possible values are:</p> <ul style="list-style-type: none"> • BHD—Bahraini Dinar • JPY—Japanese Yen • USD—U.S. Dollar <p>The default value is USD.</p>
ExecutionKey	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The unique execution ID generated each time a pricing API runs.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	<p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>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.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the record.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The Salesforce ID of the sales representative who owns the pricing procedure resolution. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
ReferenceKey	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Optional. The reference ID that a consuming workstream must pass in the API to search for specific logs in the Pricing Operations Console.</p>
Status	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The status of the API response.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Failure • Partial_Success—Partial Success • Success <p>The default value is Success.</p>

Associated Objects

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

[PricingAPIExecutionFeed on page 2171](#)

Feed tracking is available for the object.

[PricingAPIExecutionHistory on page 2178](#)

History is available for tracked fields of the object.

[PricingAPIExecutionShare on page 2182](#)

Sharing is available for the object.

PricingProcedureResolution

Represents a selection for a pricing procedure to execute a pricing process from a list of pricing procedures available. 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
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p>

Field	Details
	<p>Description</p> <p>Available only if the multicurrency feature is enabled. Contains the ISO code for any currency allowed by the organization.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • BHD—Bahraini Dinar • JPY—Japanese Yen • USD—U.S. Dollar <p>The default value is USD.</p>
EffectiveFrom	<p>Type</p> <p>dateTime</p> <p>Properties</p> <p>Create, Filter, Sort, Update</p> <p>Description</p> <p>The date and time when the pricing procedure resolution comes into effect.</p>
EffectiveTo	<p>Type</p> <p>dateTime</p> <p>Properties</p> <p>Create, Filter, Nillable, Sort, Update</p> <p>Description</p> <p>The date and time till when the pricing procedure resolution remains effective.</p>
LastReferencedDate	<p>Type</p> <p>dateTime</p> <p>Properties</p> <p>Filter, Nillable, Sort</p> <p>Description</p> <p>Indicates whether the pricing procedure resolution has been archived (true) or not (false). This field is read-only.</p>
LastViewedDate	<p>Type</p> <p>dateTime</p> <p>Properties</p> <p>Filter, Nillable, Sort</p> <p>Description</p> <p>The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type</p> <p>string</p>

Field	Details
	<p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Required. The name of the pricing procedure resolution.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The Salesforce ID of the sales representative who owns the pricing procedure resolution. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
PricingProcedureId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The pricing procedure record associated with this pricing procedure resolution. This field is a relationship field.</p> <p>Relationship Name PricingProcedure</p> <p>Relationship Type Lookup</p> <p>Refers To ExpressionSet</p>
ProcedureType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The pricing data store associated with this pricing recipe field mappings.</p>

Associated Objects

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

PricingProcedureResolutionFeed on page 2171

Feed tracking is available for the object.

PricingProcedureResolutionHistory on page 2178

History is available for tracked fields of the object.

PricingProcedureResolutionShare on page 2182

Sharing is available for the object.

PricingProcessExecution

Represents a record generated during the execution of a discovery or pricing procedure. Multiple procedures may be performed within a single API call, with each recorded in a Pricing API Execution record. 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
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Available only if the multicurrency feature is enabled. Contains the ISO code for any currency allowed by the organization.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • BHD—Bahraini Dinar • JPY—Japanese Yen • USD—U.S. Dollar <p>The default value is USD.</p>
ExecutionKey	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The unique execution ID generated each time a pricing API runs.</p>

Field	Details
ExecutionType	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The type of execution defined internally within the pricing API. Possible values are:</p> <ul style="list-style-type: none"> • <code>Api_Execution</code>—Api Execution • <code>Discovery</code> • <code>Discovery_Line</code>—Discovery Line • <code>Pricing</code> • <code>Pricing_Line</code>—Pricing Line <p>The default value is <code>Pricing</code>.</p>
ExecutionTypeKey	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The unique execution type ID generated internally for procedure executions, such as pricing or discovery procedures.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>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 (<code>LastReferencedDate</code>) and not viewed.</p>
Message	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p>

Field	Details
	<p>Description The message generated upon running a pricing process.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the record.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The Salesforce ID of the sales representative who owns the pricing procedure resolution. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
Status	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies the status of the execution type. Possible values are:</p> <ul style="list-style-type: none"> • Failure • Partial_Success—Partial Success • Success <p>The default value is <code>Success</code>.</p>

Associated Objects

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

[PricingProcessExecutionFeed](#) on page 2171

Feed tracking is available for the object.

PricingProcessExecutionHistory on page 2178

History is available for tracked fields of the object.

PricingProcessExecutionShare on page 2182

Sharing is available for the object.

ProductPriceHistoryLog

Stores historical pricing data based on the product's price range. This object is available in API version 62.0 and later.

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

Supported Calls

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

Fields

Field	Details
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description ISO code for any currency allowed by the organization. Available only for organizations with the multicurrency feature enabled.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • BHD—Bahraini Dinar • JPY—Japanese Yen • USD—U.S. Dollar <p>The default value is USD.</p>
Date	<p>Type date</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The date when the product price history log record is created.</p>
LastReferencedDate	<p>Type dateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description Indicates whether the product price history log has been archived (<code>true</code>) or not (<code>false</code>). This field is read-only.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>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 (<code>LastReferencedDate</code>) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Required. The name of the product price history log.</p>
ProductPriceRangeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The product price range associated with this product price history log record. This field is a relationship field.</p> <p>Relationship Name ProductPriceRange</p> <p>Relationship Type Master-detail</p> <p>Refers To ProductPriceRange (the master object)</p>
TrackedPrice	<p>Type currency</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The price for a product recorded for a particular date.</p>

Associated Objects

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

ProductPriceHistoryLogFeed on page 2171

Feed tracking is available for the object.

ProductPriceHistoryLogHistory on page 2178

History is available for tracked fields of the object.

ProductPriceRange

Represents the price range of a product determined by using a product selling model that's stored in the relevant price book. 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
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description ISO code for any currency allowed by the organization. Available only for organizations with the multicurrency feature enabled.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • BHD—Bahraini Dinar • JPY—Japanese Yen • USD—U.S. Dollar <p>The default value is USD.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Indicates whether the product price range has been archived (<code>true</code>) or not (<code>false</code>). This field is read-only.</p>

Field	Details
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>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 (<code>LastReferencedDate</code>) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Required. The name of the product price range.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The Salesforce ID of the sales representative who owns the product price range. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
ProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The product for which the price range is being determined. This field is a relationship field.</p> <p>Relationship Name Product</p> <p>Refers To Product2</p>
ProductSellingModelId	<p>Type reference</p>

Field	Details
	<p>Properties Filter, Group, Nillable, Sort</p> <p>Description The product selling model used to determine the price range of the product. This field is a relationship field.</p> <p>Relationship Name ProductSellingModel</p> <p>Refers To ProductSellingModel</p>
RecordedPrice	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The selected price of the product over a range of prices.</p>

Associated Objects

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

[ProductPriceRangeFeed](#) on page 2171

Feed tracking is available for the object.

[ProductPriceRangeHistory](#) on page 2178

History is available for tracked fields of the object.

[ProductPriceRangeShare](#) on page 2182

Sharing is available for the object.

ProductSellingModel

Defines one method by which a product can be sold; for example, as a one-time sale, an evergreen subscription, or a termed subscription. If the product is sold on subscription, this object defines the subscription's term. A product can have multiple product selling models. This object is available in API version 60.0 and later.

Supported Calls

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

Fields

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Indicates when the user last referred to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Indicates when the user last viewed this record.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name given to the product selling model.</p>
PricingTerm	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The number of pricing term units in the pricing term. Used with PricingTermUnit to define the length of the pricing term. For example, if PricingTermUnit is Months and this field is 1, the subscription is priced monthly.If the selling model is one-time, this field must be null.</p>
PricingTermUnit	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The unit of time used to define the pricing term. Used with PricingTerm to define the length of the pricing term. For example, if this field is Months and PricingTerm is 1, the subscription is priced monthly. If the selling model is one-time, this field must be null.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Months

Field	Details
	<ul style="list-style-type: none"> Quarterly Semi-Annual Annual
SellingModelType	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Indicates whether the product is sold as a one-time sale, an evergreen subscription, or a subscription with a defined term.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> Evergreen OneTime TermDefined <p>The default value is OneTime.</p>
Status	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The status of the product selling model.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> Active Draft Inactive <p>The default value is Draft.</p>

Associated Objects

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

[ProductSellingModelFeed](#) on page 2171

Feed tracking is available for the object.

[ProductSellingModelHistory](#) on page 2178

History is available for tracked fields of the object.

ProductSellingModelDataTranslation

Represents the translated values of the data stored within the ProductSellingModel record's fields. This object is available in API version 61.0 and later.

Supported Calls

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

Special Access Rules

- Your organization must be using Enterprise, Unlimited, or Developer edition.
- Translation Workbench and data translation must be enabled in your org.
- To view this object, you must have the "View Setup and Configuration" permission.

Fields

Field	Details
IsOutOfDate	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates whether the translation is out-of-date (<code>true</code>) or current (<code>false</code>). A translation is out-of-date if the parent Product2 record is updated after the last translation was filed.</p>
Language	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort</p> <p>Description The language for these translated values.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The translated value for the ProductSellingModel record name. This field is required to translate the text in other fields.</p>
ParentId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The ID of the ProductSellingModel record associated with the data that's being translated. This field is a relationship field.</p> <p>Relationship Name Parent</p> <p>Relationship Type Lookup</p> <p>Refers To ProductSellingModel</p>

Usage

Use this object to translate the data stored in a ProductSellingModel record into the different languages supported by Salesforce. If data translation is enabled for custom fields on the ProductSellingModel object, additional ProductSellingModelDataTranslation fields exist for translating the data contained within those fields.

You can't use a custom external id field in an upsert call for a ProductSellingModelDataTranslation object.

ProductSellingModelOption

A junction object between Product Selling Model and Product2. 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
Description	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The description of the product selling model option.</p>
DisplayName	<p>Type string</p>

Field	Details
	<p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the product selling model option to display to customers.</p>
Increment	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The number of pricing term units that can be used to increase a subscription term.</p>
IsDefault	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indcates the default product selling model for a product. Setting a default is optional. A product can only have one default product selling model. The default value is <code>false</code>. This field requires Industries EPC.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, the user might have only accessed this record or list view but not viewed it.</p>
Maximum	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The maximum number of pricing term units for a subscription term.</p>
Minimum	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The minimum number of pricing term units for a subscription term.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the product selling model option.</p>
Product2Id	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The ID of the Product2 record associated with this ProductSellingModelOption record. This field is a relationship field.</p> <p>Relationship Name Product2</p> <p>Relationship Type Lookup</p> <p>Refers To Product2</p>
ProductSellingModelId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The ID of the ProductSellingModel record associated with this ProductSellingModelOption record. This field is a relationship field.</p> <p>Relationship Name ProductSellingModel</p>

Field	Details
	<p>Relationship Type Lookup</p> <p>Refers To ProductSellingModel</p>
ProrationPolicyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort</p> <p>Description The ID of the ProrationPolicy record associated with this ProductSellingModelOption record. This field is a relationship field.</p> <p>Relationship Name ProrationPolicy</p> <p>Relationship Type Lookup</p> <p>Refers To ProrationPolicy</p>

Salesforce Pricing Fields on Standard Objects

Salesforce Pricing adds standard fields to some standard Salesforce objects of other features to represent information specific to pricing. These fields are available only in orgs where Salesforce Pricing is enabled.

[IndexRate](#)

Standard fields extend the IndexRate object for use in Salesforce Pricing to represent information for a given rate. This object is available in API version 65.0 and later.

IndexRate

Standard fields extend the IndexRate object for use in Salesforce Pricing to represent information for a given rate. 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
Region	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specified the region associated with the given rate.</p>
UsageType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the usage type associated with the given rate. Possible values are:</p> <ul style="list-style-type: none"> • Pricing

Salesforce Pricing Business APIs

Perform pricing request, create context instance, sync pricing data, and manage pricing recipes and pricing waterfall details by using Salesforce Pricing Business APIs.

This table lists the available Salesforce Pricing resources.

Resource	Description
/connect/core-pricing/price-contexts/<i>contextid</i> (POST)	Perform a pricing request by using the instance ID of a context.
/connect/core-pricing/pricing (POST)	Create and hydrate context instance in a single request. Provide a comprehensive response that contains final pricing details per line items and related errors, if any.
/connect/core-pricing/sync/<i>pricingSyncOrigin</i> (GET)	Sync pricing data to ensure that the lookup tables contain the latest pricing data.
/connect/core-pricing/recipe (GET)	Get the mapping details of pricing recipes to the associated pricing recipe table.

Resource	Description
/connect/core-pricing/recipe/mapping (POST)	Create a mapping between the pricing recipe and the Decision Tables. Post recipes with lookup tables or procedures.
/connect/core-pricing/versioned-revise-details (POST)	Create revisions of a pricing request with versions for adjustment entities.
/connect/core-pricing/waterfall/<i>lineItemId</i>/<i>executionId</i> (GET)	Get the persisted price waterfall that stores the process logs. Price waterfall provides insights into every step of the pricing process.
/connect/core-pricing/waterfall (POST)	Create a log of price waterfall. Price waterfall provides insights into every step of the pricing process.
/connect/core-pricing/pbeDerivedPricingSourceProduct (POST)	Get the source product for the Price Book Entry (PBE) derived pricing.
/connect/core-pricing/apiexecutionlogs/<i>executionId</i> (GET)	Get the log details of a pricing API execution record by using the execution ID.
/connect/core-pricing/pricing-process-execution/<i>executionId</i> (GET)	Get the execution details of a pricing process by using the execution ID.
/connect/core-pricing/pricing-process-execution/lineitems/<i>executionId</i>/<i>executionType</i> (GET)	Get the pricing execution details for the line items of a pricing process by using the execution ID and execution type.
/connect/core-pricing/simulationInputVariablesWithData (GET)	Get details of the pricing simulation input variables along with associated data.

This section lists the available Procedure Plan Definition-related resources. Use procedure plan definitions to define criteria for all pricing process-related requirements in one central location, and to set up the procedures based on these requirements.

Resource	Description
/connect/procedure-plan-definitions (GET, POST)	Get the records of procedure plan definitions. Additionally, create a record of a procedure plan definition.

Resource	Description
/connect/procedure-plan-definitions/<i>procedurePlanDefinitionId</i> (GET, PATCH, DELETE)	Get, update, or delete a procedure plan definition record by using the record ID.
/connect/procedure-plan-definitions/evaluate (POST)	Evaluate a procedure plan definition based on a primary object to check for prerequisites such as usage type and context mapping details.
/connect/procedure-plan-definitions/evaluate/<i>procedurePlanDefinitionName</i> (POST)	Evaluate a procedure plan definition based on the name of a definition to check for prerequisites such as usage type and context mapping details.
/connect/procedure-plan-definitions/<i>procedurePlanDefinitionId</i>/version (POST)	Create records of a procedure plan version with details.
/connect/procedure-plan-definitions/versions/<i>procedurePlanVersionId</i> (GET, PATCH, DELETE)	Get, update, or delete a procedure plan definition version record by using the record ID.

[Resources](#)

Learn more about the available Salesforce Pricing resources.

[Request Bodies](#)

Learn more about the available Salesforce Pricing API request bodies.

[Response Bodies](#)

Learn more about the available Salesforce Pricing API response bodies.

SEE ALSO:

[Connect REST API Developer Guide: Introduction](#)

Resources

Learn more about the available Salesforce Pricing resources.

[PBE Derived Pricing \(POST\)](#)

Get the source product for the Price Book Entry (PBE) derived pricing.

[Price Context \(POST\)](#)

Perform a pricing request by using the instance ID of a context.

[Pricing \(POST\)](#)

Create and hydrate context instance in a single request. Provide a comprehensive response that contains final pricing details per line items and related errors, if any.

[API Execution Logs \(GET\)](#)

Get the log details of a pricing API execution record by using the execution ID.

[Pricing Process Execution \(GET\)](#)

Get the execution details of a pricing process by using the execution ID.

[Pricing Process Execution for Line Items \(GET\)](#)

Get the pricing execution details for the line items of a pricing process by using the execution ID and execution type.

[Pricing Data Sync \(GET\)](#)

Sync pricing data to ensure that the lookup tables contain the latest pricing data.

[Pricing Recipe \(GET\)](#)

Get the mapping details of pricing recipes to the associated pricing recipe table.

[Pricing Recipe Mapping \(POST\)](#)

Create a mapping between the pricing recipe and the Decision Tables. Post recipes with lookup tables or procedures.

[Pricing Versioned Revision Details \(POST\)](#)

Create revisions of a pricing request with versions for adjustment entities.

[Pricing Waterfall \(GET\)](#)

Get the persisted price waterfall that stores the process logs. Price waterfall provides insights into every step of the pricing process.

[Pricing Waterfall \(POST\)](#)

Create a log of price waterfall. Price waterfall provides insights into every step of the pricing process.

[Procedure Plan Definitions \(GET, POST\)](#)

Get the records of procedure plan definitions. Additionally, create a record of a procedure plan definition.

[Procedure Plan Definition By ID \(GET, PATCH, DELETE\)](#)

Get, update, or delete a procedure plan definition record by using the record ID.

[Procedure Plan Evaluation By Object \(POST\)](#)

Evaluate a procedure plan definition based on a primary object to check for prerequisites such as usage type and context mapping details.

[Procedure Plan Evaluation By Definition Name \(POST\)](#)

Evaluate a procedure plan definition based on the name of a definition to check for prerequisites such as usage type and context mapping details.

[Procedure Plan Version \(POST\)](#)

Create records of a procedure plan version with details.

[Procedure Plan Version Details \(GET, PATCH, DELETE\)](#)

Get, update, or delete a procedure plan definition version record by using the record ID.

[Pricing Simulation Input Variables With Data \(GET\)](#)

Get details of the pricing simulation input variables along with associated data.

PBE Derived Pricing (POST)

Get the source product for the Price Book Entry (PBE) derived pricing.

Resource

```
/connect/core-pricing/pbeDerivedPricingSourceProduct
```


Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/core-pricing/pbeDerivedPricingSourceProduct
```

Available version

61.0

HTTP methods

POST

Request body for POST**JSON example**

```
{
  "productId": "01txx0000006i2SAAQ",
  "pricebookEntryId": "01uxx0000008yYcAAI",
  "effectiveFrom": "2020-01-01T22:53:20.000Z",
  "effectiveTo": "2021-01-01T22:53:20.000Z"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
effectiveFrom	String	Date from when the price book entry is effective.	Required	61.0
effectiveTo	String	Date until when the price book entry is effective.	Required	61.0
pricebookEntryId	String	ID of the price book entry.	Required	61.0
productId	String	ID of the price book.	Required	61.0

Response body for POST

[PBE Derived Pricing](#)

Price Context (POST)

Perform a pricing request by using the instance ID of a context.

If price waterfall is disabled from Salesforce Pricing Setup in your org, this API doesn't return the waterfall details. You can use the [Price Waterfall API](#) to retrieve the waterfall details if price waterfall persistence is enabled in Salesforce Pricing Setup.

Resource

```
/connect/core-pricing/price-contexts/contextid
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/core-pricing/price-contexts/0U3RM00000000SR0AY
```

Available version

60.0

HTTP methods

POST

Request body for POST**JSON example**

```
{
  "configurationOverrides": {
    "skipWaterfall": true,
    "useSessionScopedContext": true,
    "persistContext": true,
    "taggedData": false
  }
  "procedureName": "ES1"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
configuration Overrides	Configuration Override Input	Parameters to override pricing configuration.	Optional	60.0
procedure Name	String	Name of the pricing procedure.	Optional	60.0

Response body for POST[Pricing Response](#)**Pricing (POST)**

Create and hydrate context instance in a single request. Provide a comprehensive response that contains final pricing details per line items and related errors, if any.

If price waterfall is disabled from Salesforce Pricing Setup in your org, this API doesn't return the waterfall details. You can use the [Price Waterfall API](#) to retrieve the waterfall details if price waterfall persistence is enabled in Salesforce Pricing Setup.

Resource

```
/connect/core-pricing/pricing
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/core-pricing/pricing
```

Available version

60.0

Requires Chatter

No

HTTP methods

POST

Request body for POST**JSON example**

```

{
  "contextDefinitionId": "110xx0000006PdxEAE",
  "contextMappingId": "11jxx0000004LDDAA2",
  "jsonDataString": {
    "Cart": [
      {
        "id": "cart_1001",
        "cart_id": "cart_1001",
        "PriceBookId": "PriceBookId_1001",
        "businessObjectType": "Cart",
        "CartItem": [
          {
            "id": "lineItem_1001",
            "line_item_id": "lineItem_1001",
            "Quantity": 7,
            "PriceType": "OneTime",
            "Frequency": "",
            "UOM": "",
            "businessObjectType": "CartItem",
            "product_id": "01txx0000006i44AAA",
            "UnitPrice": 6.8,
            "NetUnitPrice": 0,
            "Attribute": [
              {
                "name": "Color",
                "code": "RED",
                "isPriceImpacting": true,
                "businessObjectType": "Attribute",
                "id": "Attribute_1001",
                "attribute_id": "Attribute_1001"
              },
              {
                "name": "Size",
                "code": "10INCH",
                "isPriceImpacting": true,
                "businessObjectType": "Attribute",
                "id": "Attribute_1002",
                "attribute_id": "Attribute_1002"
              }
            ]
          }
        ],
      },
      {
        "id": "lineItem_1002",
        "line_item_id": "lineItem_1002",
        "quantity": 3,
        "PriceType": "OneTime",
        "Frequency": "",
        "UOM": "",
        "businessObjectType": "CartItem",
        "product_id": "01txx0000006i2SAAQ",
        "unitprice": 6,
      }
    ]
  }
}

```

```

    "NetUnitPrice": 0,
    "Attribute": [
      {
        "name": "Color",
        "code": "BLUE",
        "isPriceImpacting": true,
        "businessObjectType": "Attribute",
        "id": "Attribute_1003",
        "attribute_id": "Attribute_1003"
      },
      {
        "name": "Size",
        "code": "6INCH",
        "isPriceImpacting": true,
        "businessObjectType": "Attribute",
        "id": "Attribute_1004",
        "attribute_id": "Attribute_1004"
      }
    ]
  }
]
}
}
},
"pricingProcedureId": "9QMxx0000004CKKGA2",
"configurationOverrides": {
  "skipWaterfall": true,
  "useSessionScopedContext": true,
  "persistContext": true,
  "referenceKey": "referenceKey-12345",
  "displayContext" : false,
  "taggedData": false,
  "isHighVolumeLineItems": false
}
}
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
configuration Overrides	Configuration Override Input	Parameters to override the pricing configuration.	Optional	60.0
context DefinitionId	String	ID of the context definition that defines the structure of the input data.	Required	60.0
context MappingId	String	ID of the context mapping that maps the input data to the context instance.	Required	60.0
jsonData String	String	Data to hydrate the context, which must be in JSON format and	Required	60.0

Name	Type	Description	Required or Optional	Available Version
		<p>passed as String. Pass the JSON data as String by using the <code>stringify()</code> method to convert the object to string.</p> <p>The keys in the <code>jsonDataString</code> property must be in accordance to the <code>contextMappingId</code> property sent in the request.</p>		
<code>pricingProcedureId</code>	String	ID or API name of the pricing procedure used for calculating the prices. A pricing procedure is represented as an Expression Set Definition in the system.	Optional	60.0

Response body for POST[Pricing Output](#)**API Execution Logs (GET)**

Get the log details of a pricing API execution record by using the execution ID.

Resource

```
/connect/core-pricing/apiexecutionlogs/executionId
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/core-pricing/apiexecutionlogs/29646938297972
```

Available version

63.0

HTTP methods

GET

Path parameter for GET

Parameter Name	Type	Description	Required or Optional	Available Version
<code>executionId</code>	String	ID of the pricing process execution record.	Required	63.0

Response body for GET[Pricing Execution Waterfall Response](#)

Pricing Process Execution (GET)

Get the execution details of a pricing process by using the execution ID.

Resource

```
/connect/core-pricing/pricing-process-execution/executionId
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/core-pricing/pricing-process-execution/29646938297972
```

Available version

63.0

HTTP methods

GET

Path parameter for GET

Parameter Name	Type	Description	Required or Optional	Available Version
executionId	String	ID of the pricing process execution record. The ID is generated each time a pricing process is executed.	Required	63.0

Query parameter for GET

Parameter Name	Type	Description	Required or Optional	Available Version
executionType	String	Type of execution that's defined internally within the pricing API. Valid values are: <ul style="list-style-type: none"> • <code>API_Execution</code> • <code>Discovery</code>—Discovery procedure • <code>Discovery_Line</code>—Discovery procedure for the line items. • <code>Pricing</code>—Pricing procedure • <code>Pricing_Line</code>—Pricing procedure for the line items. If the <code>executionType</code> parameter isn't specified, the API retrieves records for all the execution types that are associated with the specified execution ID.	Optional	63.0

Response body for GET

[Pricing Process Execution Response](#)

Pricing Process Execution for Line Items (GET)

Get the pricing execution details for the line items of a pricing process by using the execution ID and execution type.

Resource

```
/connect/core-pricing/pricing-process-execution/lineitems/executionId/executionType
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/core-pricing/pricing-process-execution/lineitems/29646938297972/Pricing_Line
```

Available version

63.0

HTTP methods

GET

Path parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
executionId	String	ID of the pricing process execution record.	Required	63.0
executionType	String	Type of the execution that's defined internally within the pricing API. Valid values are: <ul style="list-style-type: none"> • Pricing_Line • Discovery_Line 	Required	63.0

Response body for GET

[Pricing Process Execution Details for Line Items](#)

Pricing Data Sync (GET)

Sync pricing data to ensure that the lookup tables contain the latest pricing data.

To partially synchronize pricing data, use the Decision Table Refresh Action in a Flow. See [Decision Table Refresh Action](#).

Resource

```
/connect/core-pricing/sync/pricingSyncOrigin
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/core-pricing/sync/syncData
```

Available version

60.0

HTTP methods

GET

Response body for GET

[Pricing Generic Response](#)

Pricing Recipe (GET)

Get the mapping details of pricing recipes to the associated pricing recipe table.

Resource

```
/connect/core-pricing/recipe
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/core-pricing/recipe
```

Available version

60.0

HTTP methods

GET

Response body for GET

[Pricing Recipe Response](#)

Pricing Recipe Mapping (POST)

Create a mapping between the pricing recipe and the Decision Tables. Post recipes with lookup tables or procedures.

Resource

```
/connect/core-pricing/recipe/mapping
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/core-pricing/recipe/mapping
```

Available version

60.0

HTTP methods

POST

Request body for POST

JSON example

```
{
  "recipeId" : "12Gxx0000005J9MEAU",
  "pricingRecipeLookUpTableInputRepresentations": [
    {
      lookupId: "12Gxx0000005J9MEAU",
      pricingComponentType: "CustomDiscount"
    },
    {
      lookupId: "12Gxx0000005J9MEAU",
      pricingComponentType: "CustomDiscount"
    }
  ],
  "pricingRecipeProcedureInputRepresentation" : {
    "procedureId" : "9QLxx0000004C92GAE"
  }
}
```



```
}
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
pricing RecipeLookUp TableInput Representations	Pricing Recipe LookUp Table Input[]	Input representation of the recipe mapping.	Required	60.0
pricing Recipe Procedure Input Representation	Pricing Recipe Procedure Input	Input representation of the procedure that's used in the pricing recipe.	Required	60.0
recipeId	String	ID of the pricing recipe.	Required	60.0

Response body for POST

[Pricing Recipe Post](#)

Pricing Versioned Revision Details (POST)

Create revisions of a pricing request with versions for adjustment entities.

Resource

```
/connect/core-pricing/versioned-revise-details
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/core-pricing/versioned-revise-details
```

Available version

60.0

HTTP methods

POST

Request body for POST**JSON example**

This example shows the input for versioned revision details for attribute-based adjustment.

```
{
  "entityName": "AttributeBasedAdjustment",
  "id": "entityId",
  "priceAdjustmentId": "priceAdjustmentScheduleId",
  "productId": "ProductId",
  "productSellingModelId": "PsmId",
  "adjustmentType": "AdjustmentType",
}
```

```

    "adjustmentValue": "AdjustmentValue (Numeric) ",
    "effectiveFrom": "EffectiveFrom date",
    "effectiveTo": "EffectiveTo Date",
    "additionalFieldsToValueMap": {
    "attributeBasedAdjRuleId": "AttributeBasedAdjRuleId"
    }
  }
}

```

This example shows the input for versioned revision details for bundle-based adjustment.

```

{
  "entityName": "BundleBasedAdjustment",
  "id": "entityId",
  "priceAdjustmentScheduleId": "priceAdjustmentScheduleId",
  "productId": "ProductId",
  "productSellingModelId": "PsmId",
  "adjustmentType": "AdjustmentType",
  "adjustmentValue": "AdjustmentValue (Numeric) ",
  "effectiveFrom": "EffectiveFrom date",
  "effectiveTo": "EffectiveTo Date",
  "additionalFieldsToValueMap": {
    "rootBundleId": "RootBundleId",
    "parentProductId": "ParentProductId"
  }
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
additionalFieldsToValueMap	Map<String, String>	Map containing the additional fields specific to the entity.	Optional	60.0
adjustmentType	String	Adjustment type such as, percentage, amount, or override.	Required	60.0
adjustmentValue	String	Value for the adjustment.	Required	60.0
effectiveFrom	String	Date from when the adjustment is effective.	Required	60.0
effectiveTo	String	Date until when the adjustment is effective.	Optional	60.0
entityName	String	Name of the entity such as AttributeBasedAdjustment entity or BundleBasedAdjustment entity.	Required	60.0
id	String	ID of the record.	Required	60.0

Name	Type	Description	Required or Optional	Available Version
price Adjustment ScheduleId	String	ID of the price adjustment schedule record.	Required	60.0
productId	String	Product ID of the record.	Required	60.0
product Selling ModelId	String	Product selling model ID associated to the record.	Optional	60.0

Response body for POST

[Pricing Versioned Revision Details](#)

Pricing Waterfall (GET)

Get the persisted price waterfall that stores the process logs. Price waterfall provides insights into every step of the pricing process.

If price waterfall persistence is disabled from Salesforce Pricing Setup in your org, this API doesn't return the waterfall details. You can view the waterfall details in the [Pricing API](#) or [Price Context API](#) response if price waterfall is enabled in Salesforce Pricing Setup.

Resource

```
/connect/core-pricing/waterfall/lineItemId/executionId
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/core-pricing/waterfall/Gold/2/HNBRZr9jA4HS?tagsToFilter=UnitPrice
```

Available version

60.0

HTTP methods

GET

Query parameters

Name	Type	Description	Required or Optional	Available Version
tagsToFilter	String	Comma-separated tags to filter.	Optional	61.0
usageType	String	Usage type of the waterfall log record. Valid values are: <ul style="list-style-type: none"> Pricing Discovery Rating—Specifies that the record type is <code>Rating</code>. If this value is specified, the API creates a log of rating waterfall. See Rating Waterfall. 	Optional	62.0

Name	Type	Description	Required or Optional	Available Version
		The default value is Pricing.		

Response body for GET

[Line Item Waterfall Response](#)

Pricing Waterfall (POST)

Create a log of price waterfall. Price waterfall provides insights into every step of the pricing process.

Resource

```
/connect/core-pricing/waterfall
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/core-pricing/waterfall
```

Available version

60.0

HTTP methods

POST

Request body for POST**JSON example**

```
{
  "currencyCode": "USD",
  "executionEndTimestamp": "2023-07-31T20:11:29.625Z",
  "executionId": "executionId1",
  "executionStartTimestamp": null,
  "lineItemId": "item1",
  "output": {
    "Subtotal": 38.25,
    "ListPrice": 10,
    "NetUnitPrice": 7.65
  },
  "waterfall": [{
    "fieldToTagNameMapping": {
      "Product2Id": "ItemProduct",
      "Subtotal": "Subtotal",
      "Pricebook2Id": "Pricebook",
      "Quantity": "ItemQuantity",
      "LineItemId": "SalesTransactionSource",
      "ListPrice": "ItemListPrice"
    }
  }],
  "inputParameters": {
    "Product2Id": "01txx0000006i44AAA",
    "Pricebook2Id": "01sxx0000005q9xAAA",
    "Quantity": 5,
  }
}
```

```

        "LineItemId": "item1"
    },
    "outputParameters": {
        "Subtotal": 50,
        "ListPrice": 10
    },
    "pricingElement": {
        "adjustments": [{
            "AdjustmentValue": "95.00",
            "AdjustmentType": "Amount"
        }],
        "description": null,
        "elementType": "ListPrice",
        "name": "List Price"
    },
    "sequence": 1
},
{
    "fieldToTagNameMapping": {
        "PriceAdjustmentScheduleId": "ItemDescription",
        "NetUnitPrice": "ItemNetUnitPrice",
        "Product2Id": "ItemProduct",
        "LowerBound": "ItemQuantity",
        "UpperBound": "ItemQuantity",
        "Subtotal": "Subtotal",
        "Quantity": "ItemQuantity",
        "LineItemId": "SalesTransactionSource",
        "InputUnitPrice": "ItemListPrice"
    },
    "inputParameters": {
        "PriceAdjustmentScheduleId": "84Xxx0000004CGSEA2",
        "Product2Id": "01txx0000006i44AAA",
        "LowerBound": 5,
        "UpperBound": 5,
        "Quantity": 5,
        "LineItemId": "item1",
        "InputUnitPrice": 10
    },
    "outputParameters": {
        "NetUnitPrice": 8.5,
        "Subtotal": 42.5
    },
    "pricingElement": {
        "adjustments": [{
            "AdjustmentValue": "15.00",
            "AdjustmentType": "Percentage"
        }],
        "description": null,
        "elementType": "VolumeDiscount",
        "name": "Volume Discount"
    },
    "sequence": 2
}
]

```

```
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
contextDefinitionVersionId	String	Context definition version ID of the pricing procedure.	Optional	60.0
contextMappingId	String	Context mapping ID of the pricing procedure.	Optional	60.0
currencyCode	String	Currency code such as, USD or INR.	Optional	60.0
executionEndTimestamp	String	End timestamp of procedure execution.	Optional	60.0
executionId	String	Execution ID for a particular execution of a pricing procedure.	Required	60.0
executionStartTimestamp	String	Start timestamp of procedure execution.	Optional	60.0
lineItemId	String	Line item ID for which the price is being calculated.	Required	60.0
output	Map<String, Object>	Output of the pricing procedure.	Optional	60.0
waterfall	Pricing Waterfall Input[]	Details of the pricing waterfall.	Required	60.0

Response body for POST

[Pricing Generic Response](#)

Procedure Plan Definitions (GET, POST)

Get the records of procedure plan definitions. Additionally, create a record of a procedure plan definition.

Resource

```
/connect/procedure-plan-definitions

```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/procedure-plan-definitions?isTemplate=true

```

Available version

62.0

HTTP methods

GET, POST

Request parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
isTemplate	Boolean	Indicates whether to return a list of file-based definitions (<code>true</code>) or not (<code>false</code>). This API request returns a list of database-based definitions, by default.	Optional	62.0

Response body for GET[Procedure Plan Definitions](#)**Request body for POST****JSON example**

This example shows a sample request to create a procedure plan definition record by using the Procedure Plan Definitions (POST) API.

```
{
  "description": "Definition for Quote",
  "developerName": "Quote_Definition_Sample",
  "name": "Quote_Definition_Sample",
  "processType": "Default",
  "primaryObject": "BusinessHours",
  "procedurePlanDefinitionVersions": [
    {
      "active": false,
      "contextDefinition": "SalesTransactionContext__stdctx",
      "readContextMapping": "QuoteEntitiesMapping",
      "saveContextMapping": "QuoteEntitiesMapping",
      "effectiveFrom": "2024-07-15T10:15:30.000Z",
      "developerName": "Quote_Definition_V1",
      "rank": 1
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
description	String	Description of the procedure plan definition.	Optional	62.0
developer Name	String	Developer name of the procedure plan definition.	Required if you're invoking the Procedure Plan Definitions API (POST) .	62.0

Name	Type	Description	Required or Optional	Available Version
name	String	Name of the procedure plan definition.	Optional	62.0
primary Object	String	Source object that's used to create a procedure with rule-based criteria. This property value must be a valid object name and must be unique in the ProcedurePlanDefinition object.	Required if you're invoking the Procedure Plan Definitions API (POST) and if you're creating a procedure with rule-based criteria.	62.0
procedurePlan Definition Versions	Procedure Plan Definition Version Input[]	List of versions of a procedure plan definition.	Required	62.0
processType	String	Specifies the business processes that need a procedure plan for each sObject and definition. Valid values are: <ul style="list-style-type: none"> • Billing • DRO • DeepClone • ProductDiscovery • Revenue Cloud These values can be used based on the available license. If unspecified, the value is set to Default.	Required	63.0
recordId	String	ID of the procedure plan definition record.	Required if you're invoking the Procedure Plan Definition By ID API (PATCH) .	62.0

Response body for POST[Procedure Plan Generic](#)**Procedure Plan Definition By ID (GET, PATCH, DELETE)**

Get, update, or delete a procedure plan definition record by using the record ID.

Resource

```
/connect/procedure-plan-definitions/procedurePlanDefinitionId
```

The `procedurePlanDefinitionId` property value is the ID or name of the procedure plan definition record to perform the request for.

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/procedure-plan-definitions/1FNxx0000004EsOGAU
```

Available version

62.0

HTTP methods

DELETE, GET, PATCH

You can delete a procedure plan definition only if it doesn't include any active procedure plan version.

Response body for GET[Procedure Plan Definition](#)**Request body for PATCH****JSON example**

This example shows a sample request to update a procedure plan definition by using the Procedure Plan Definition By ID (PATCH) API.



Note: The properties that aren't specified in the input are deleted when updating the record.

```
{
  "description": "Default definition patch update",
  "developerName": "Quote_Definition",
  "name": "Quote_Definition",
  "primaryObject": "Quote",
  "recordId": "1FNxx0000004EsOGAU"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
description	String	Description of the procedure plan definition.	Optional	62.0
developer Name	String	Developer name of the procedure plan definition.	Required if you're invoking the Procedure Plan Definitions API (POST) .	62.0
name	String	Name of the procedure plan definition.	Optional	62.0
primary Object	String	Source object that's used to create a procedure with rule-based criteria. This property value must be a valid object name and must be unique in the ProcedurePlanDefinition object.	Required if you're invoking the Procedure Plan Definitions API (POST) and if you're creating a procedure with rule-based criteria.	62.0

Name	Type	Description	Required or Optional	Available Version
procedurePlanDefinitionVersions	Procedure Plan Definition Version Input[]	List of versions of a procedure plan definition.	Required	62.0
processType	String	Specifies the business processes that need a procedure plan for each sObject and definition. Valid values are: <ul style="list-style-type: none"> • Billing • DRO • DeepClone • ProductDiscovery • Revenue Cloud These values can be used based on the available license. If unspecified, the value is set to Default.	Required	63.0
recordId	String	ID of the procedure plan definition record.	Required if you're invoking the Procedure Plan Definition By ID API (PATCH) .	62.0

Response body for PATCH[Procedure Plan Definition](#)**Procedure Plan Evaluation By Object (POST)**

Evaluate a procedure plan definition based on a primary object to check for prerequisites such as usage type and context mapping details.

Resource

```
/connect/procedure-plan-definitions/evaluate
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/procedure-plan-definitions/evaluate
```

Available version

62.0

HTTP methods

POST

Request body for POST**JSON example**

This example shows a sample request to evaluate a procedure plan definition by using a primary object.

```
{
  "idList": ["a01DU000000BylcYAC"],
  "evaluationDate": "2024-07-08T10:15:30.000Z",
  "processType": "Default",
  "sectionType": ["PricingProcedure"],
  "subSectionType": ["Revenue"]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
evaluationDate	String	Date when the evaluation is applicable. This property value must be within the date range when the procedure plan definition is effective.	Required	62.0
idList	String[]	List of record IDs of the procedure plan definitions to be evaluated.	Required only if you're invoking the Procedure Plan Evaluation By Object (POST) API .	62.0
processType	String	Specifies the business processes that need a procedure plan for each sObject and definition. Valid values based on the available are: <ul style="list-style-type: none"> • Billing • DRO • DeepClone • ProductDiscovery • Revenue Cloud These values can be used based on the available license. If unspecified, the value is set to <code>Default</code> . If a procedure plan definition exist in the org with <code>processType</code> value as <code>null</code> , modify the value to <code>Default</code> .	Optional	63.0
sectionType	String[]	Name of section to be evaluated. Valid values are: <ul style="list-style-type: none"> • PricingProcedure • ProductDiscoveryProcedure 	Optional	62.0

Name	Type	Description	Required or Optional	Available Version
		<ul style="list-style-type: none"> ProductQualificationProcedure PricingDiscoveryProcedure DiscountSpreadServiceProcedure RatingProcedure Custom RatingDiscoveryProcedure 		
subSectionType	String[]	Name of subsection to be evaluated.	Optional	62.0

The combination of the `sectionType` and `subSectionType` property values must be unique for every procedure plan version.

Response body for POST

[Procedure Plan Evaluation Response](#)

Procedure Plan Evaluation By Definition Name (POST)

Evaluate a procedure plan definition based on the name of a definition to check for prerequisites such as usage type and context mapping details.

Resource

```
/connect/procedure-plan-definitions/evaluate/procedurePlanDefinitionName
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/procedure-plan-definitions/evaluate/Sample_Definition
```

Available version

62.0

HTTP methods

POST

Request body for POST

JSON example

This example shows a sample request to evaluate a procedure plan definition by using a definition name.

```
{
  "evaluationDate": "2024-07-08T10:15:30.000Z",
  "processType": "Default",
  "sectionType": ["PricingProcedure"],
  "subSectionType": ["Revenue"]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
evaluationDate	String	Date when the evaluation is applicable. This property value must be within the date range when the procedure plan definition is effective.	Required	62.0
idList	String[]	List of record IDs of the procedure plan definitions to be evaluated.	Required only if you're invoking the Procedure Plan Evaluation By Object (POST) API .	62.0
processType	String	Specifies the business processes that need a procedure plan for each sObject and definition. Valid values based on the available are: <ul style="list-style-type: none"> • Billing • DRO • DeepClone • ProductDiscovery • Revenue Cloud These values can be used based on the available license. If unspecified, the value is set to <code>Default</code> . If a procedure plan definition exist in the org with <code>processType</code> value as <code>null</code> , modify the value to <code>Default</code> .	Optional	63.0
sectionType	String[]	Name of section to be evaluated. Valid values are: <ul style="list-style-type: none"> • PricingProcedure • ProductDiscoveryProcedure • ProductQualificationProcedure • PricingDiscoveryProcedure • DiscountSpreadServiceProcedure • RatingProcedure • Custom • RatingDiscoveryProcedure 	Optional	62.0
subSectionType	String[]	Name of subsection to be evaluated.	Optional	62.0

The combination of the `sectionType` and `subSectionType` property values must be unique for every procedure plan version.

Response body for POST

[Procedure Plan Evaluation Response](#)

Procedure Plan Version (POST)

Create records of a procedure plan version with details.

Resource

```
/connect/procedure-plan-definitions/procedurePlanDefinitionId/version
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/  
procedure-plan-definitions/1FNxx0000004EsOGAU/version
```

Available version

62.0

HTTP methods

POST

Request body for POST


JSON example

```
{
  "active": false,
  "developerName": "sample_version_input",
  "effectiveFrom": "2024-07-09T00:00:00.000Z",
  "contextDefinition": "SalesTransactionContext__stdctx",
  "procedurePlanSections": [
    {
      "isInherited": false,
      "procedurePlanOptions": [
        {
          "saveContextMapping": "AssetToSalesTransactionMapping",
          "expressionSetDefinition": "9QAZ60000004ECCOA2",
          "expressionSetLabel": "Revenue_Default_Pricing_Procedure",
          "expressionSetApiName": "Revenue Default Pricing Procedure",
          "logic": "1 AND 2 AND 3",
          "priority": 1,
          "procedurePlanCriterion": [
            {
              "conditionSequence": 1,
              "fieldObject": "BillingCountry",
              "fieldPath": "BillingCountry",
              "literalValue": "test",
              "operator": "Equals",
              "dataType": "Text"
            },
            {
              "conditionSequence": 2,
              "fieldObject": "BillingPostalCode",
```

```

        "fieldPath": "BillingPostalCode",
        "literalValue": "sample",
        "operator": "Equals",
        "dataType": "Text"
      },
      {
        "conditionSequence": 3,
        "fieldObject": "LastActivityDate",
        "fieldPath": "LastActivityDate",
        "literalValue": "2024-07-14",
        "operator": "LessThan",
        "dataType": "Date"
      }
    ]
  },
  "resolutionType": "RuleBased",
  "sectionType": "PricingProcedure",
  "sequence": 1,
  "subsectionType": "PricingProcedure",
  "recordId": "1FRZ600000080IAOA2"
}
],
"rank": 1,
"readContextMapping": "ProductDiscoveryContextMapping",
"saveContextMapping": "OrderEntitiesMapping"
}

```

 **Note:** The properties that aren't specified in the input are deleted when updating the record.

Properties

Name	Type	Description	Required or Optional	Available Version
active	Boolean	Indicates whether this procedure plan definition version is active (<code>true</code>) or not (<code>false</code>). You can't edit or delete a procedure plan version that's in the active state.	Required	62.0
context Definition	String	Context definition that's associated with the procedure plan definition version record.	Required	62.0
developer Name	String	Unique developer name of the procedure plan definition version.	Required	62.0
effective From	String	Date and time from when the procedure plan definition version comes into effect.	Required	62.0
effectiveTo	String	Date and time from when the procedure plan definition version is no longer in effect.	Required	62.0

Name	Type	Description	Required or Optional	Available Version
inheritedFrom	String	Template this procedure plan definition version is created from.	This property is read-only.	62.0
procedurePlanSections	Procedure Plan Section Input[]	<p>Procedure setup sections for a procedure plan definition. Each section enables the setup of a procedure type by using a rule-based criteria.</p> <p>Keep these considerations in mind when you modify this property.</p> <ul style="list-style-type: none"> You can edit or delete a procedure plan section if it isn't associated with an active procedure plan version. You can create a procedure plan section with rule-based resolution type if the primary object isn't empty in the definition. 	Required	62.0
rank	Integer	Current rank of the procedure plan definition version that's used to decide the sequence of execution of a procedure plan definition version.	Required	62.0
readContextMapping	String	<p>Mapping that's used to read data from the mapped object and populate the context definition.</p> <p>This property value must be associated with a context definition.</p>	Optional	62.0
recordId	String	ID of the procedure plan definition version record.	Required	62.0
saveContextMapping	String	<p>Mapping that's used to save data from the context definition and populate the mapped object.</p> <p>This property value must be associated with a context definition.</p>	Optional	62.0
status	String	Status of the procedure plan definition version record.	Optional	62.0

Response body for POST[Procedure Plan Generic](#)

Procedure Plan Version Details (GET, PATCH, DELETE)

Get, update, or delete a procedure plan definition version record by using the record ID.

Resource

```
/connect/procedure-plan-definitions/versions/procedurePlanVersionId
```

The `procedurePlanVersionId` property value is the ID or name of the procedure plan version record to perform the request for.

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/  
procedure-plan-definitions/versions/1Cvxx0000004E1ACAU
```

Available version

62.0

HTTP methods

DELETE, GET, PATCH

You can't delete a procedure plan version if it's the only procedure plan version in a procedure plan definition.

Response body for GET

[Procedure Plan Definition Version](#)

Request body for PATCH


JSON example

```
{
  "active": false,
  "developerName": "sample_version_input",
  "effectiveFrom": "2024-07-09T00:00:00.000Z",
  "contextDefinition": "SalesTransactionContext__stdctx",
  "procedurePlanSections": [
    {
      "isInherited": false,
      "procedurePlanOptions": [
        {
          "saveContextMapping": "AssetToSalesTransactionMapping",
          "expressionSetDefinition": "9QAZ60000004ECCOA2",
          "expressionSetLabel": "Revenue_Default_Pricing_Procedure",
          "expressionSetApiName": "Revenue Default Pricing Procedure",
          "logic": "1 AND 2 AND 3",
          "priority": 1,
          "procedurePlanCriterion": [
            {
              "conditionSequence": 1,
              "fieldObject": "BillingCountry",
              "fieldPath": "BillingCountry",
              "literalValue": "test",
              "operator": "Equals",
              "dataType": "Text"
            },
            {
              "conditionSequence": 2,
              "fieldObject": "BillingPostalCode",
```

```

        "fieldPath": "BillingPostalCode",
        "literalValue": "sample",
        "operator": "Equals",
        "dataType": "Text"
    },
    {
        "conditionSequence": 3,
        "fieldObject": "LastActivityDate",
        "fieldPath": "LastActivityDate",
        "literalValue": "2024-07-14",
        "operator": "LessThan",
        "dataType": "Date"
    }
]
}
],
"resolutionType": "RuleBased",
"sectionType": "PricingProcedure",
"sequence": 1,
"subsectionType": "PricingProcedure",
"recordId": "1FRZ600000080IAOA2"
}
],
"rank": 1,
"readContextMapping": "ProductDiscoveryContextMapping",
"saveContextMapping": "OrderEntitiesMapping"
}

```

 **Note:** The properties that aren't specified in the input are deleted when updating the record.

Properties

Name	Type	Description	Required or Optional	Available Version
active	Boolean	Indicates whether this procedure plan definition version is active (<code>true</code>) or not (<code>false</code>). You can't edit or delete a procedure plan version that's in the active state.	Required	62.0
context Definition	String	Context definition that's associated with the procedure plan definition version record.	Required	62.0
developer Name	String	Unique developer name of the procedure plan definition version.	Required	62.0
effective From	String	Date and time from when the procedure plan definition version comes into effect.	Required	62.0
effectiveTo	String	Date and time from when the procedure plan definition version is no longer in effect.	Required	62.0

Name	Type	Description	Required or Optional	Available Version
inheritedFrom	String	Template this procedure plan definition version is created from.	This property is read-only.	62.0
procedurePlanSections	Procedure Plan Section Input[]	<p>Procedure setup sections for a procedure plan definition. Each section enables the setup of a procedure type by using a rule-based criteria.</p> <p>Keep these considerations in mind when you modify this property.</p> <ul style="list-style-type: none"> You can edit or delete a procedure plan section if it isn't associated with an active procedure plan version. You can create a procedure plan section with rule-based resolution type if the primary object isn't empty in the definition. 	Required	62.0
rank	Integer	Current rank of the procedure plan definition version that's used to decide the sequence of execution of a procedure plan definition version.	Required	62.0
readContextMapping	String	<p>Mapping that's used to read data from the mapped object and populate the context definition.</p> <p>This property value must be associated with a context definition.</p>	Optional	62.0
recordId	String	ID of the procedure plan definition version record.	Required	62.0
saveContextMapping	String	<p>Mapping that's used to save data from the context definition and populate the mapped object.</p> <p>This property value must be associated with a context definition.</p>	Optional	62.0
status	String	Status of the procedure plan definition version record.	Optional	62.0

Response body for PATCH[Procedure Plan Generic](#)

Pricing Simulation Input Variables With Data (GET)

Get details of the pricing simulation input variables along with associated data.

Resource

```
/connect/core-pricing/simulationInputVariablesWithData
```

Resource example

```
https://test.salesforce.com/servlet/servlet.HttpRequest?sessionId=00000000000000000000000000000000&url=/connect/core-pricing/simulationInputVariablesWithData
```

Available version

64.0

HTTP methods

GET

Request parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
context DefinitionId	String	ID or developer name of the context definition.	Required	64.0
contextMapping Id	String	ID or name of the context mapping that's used.	Required	64.0
entityId	String	ID of a quote or an order.	Required	64.0
expressionSet VersionId	String	ID of the expression set that starts with 9QM.	Required	64.0

Response body for GET

[Pricing Simulation Input Variables With Data](#)

Request Bodies

Learn more about the available Salesforce Pricing API request bodies.

[Adjustment Details Input](#)

Input representation of the adjustment details.

[Configuration Override Input](#)

Input representation of the details to override for a Pricing API configuration.

[PBE Derived Pricing Input](#)

Input representation of the request to get the source product for the Price Book Entry (PBE) derived pricing.

[Pricing Input](#)

Input representation of the details of a Pricing API request.

[Pricing Recipe Input](#)

Input representation to set up a pricing recipe page.

[Pricing Recipe LookUp Table Input](#)

Input representation of the lookup tables for the setup page recipe.

[Pricing Recipe Procedure Input](#)

Input representation of the procedure for the setup page recipe.

[Pricing Request Input](#)

Input representation of a pricing request.

[Pricing Versioned Revision Details Input](#)

Input representation of the versioned revision details.

[Pricing Waterfall Input](#)

Input representation of the pricing waterfall details.

[Pricing Waterfall Log Input](#)

Input representation of the request to create an explainability action log.

[Procedure Plan Criterion Input](#)

Input representation of the details of a procedure plan criterion.

[Procedure Plan Definition Input](#)

Input representation of the details of a procedure plan definition.

[Procedure Plan Definition Version Input](#)

Input representation of the details of a procedure plan definition version.

[Procedure Plan Evaluation Input](#)

Input representation of the details used to evaluate a procedure plan definition.

[Procedure Plan Section Input](#)

Input representation of the details of a procedure plan section.

[Procedure Plan Option Input](#)

Input representation of the details of a procedure plan option.

Adjustment Details Input

Input representation of the adjustment details.

JSON example

```
"pricingElement": {
  "adjustments": [{
    "AdjustmentValue": "15.00",
    "AdjustmentType": "Percentage"
  }],
  "description": null,
  "elementType": "VolumeDiscount",
  "name": "Volume Discount"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
adjustments	Map<String, Object>[]	Details of the pricing element.	Optional	60.0
description	String	Description of the pricing element.	Optional	60.0
elementType	String	Type of the pricing element.	Optional	60.0
name	String	Name of the pricing element.	Optional	60.0

Configuration Override Input

Input representation of the details to override for a Pricing API configuration.

JSON example

```

"configurationOverrides": {
  "skipWaterfall": true,
  "useSessionScopedContext": true,
  "persistContext": true,
  "referenceKey": "referenceKey-12345",
  "displayContext" : false,
  "taggedData": false,
  "isHighVolumeLineItems": false
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
discovery Procedure	String	Name of the discovery procedure to use to fetch the details of assets.	Optional	61.0
display Context	Boolean	Indicates whether the context structure for pricing must be displayed (<code>true</code>) or not (<code>false</code>).	Optional	61.0
isHighVolume LineItems	Boolean	Indicates whether the pricing API returns pricing details for more than 100 line items (<code>true</code>) or not (<code>false</code>).	Optional	63.0
persist Context	Boolean	Indicates whether the context must be persisted as per the mapping (<code>true</code>) or not (<code>false</code>).	Optional	60.0
referenceKey	String	Reference ID that a consuming workstream provides in the API to search for specific logs in the Pricing Operations Console.	Optional	63.0

Name	Type	Description	Required or Optional	Available Version
skipDiscovery	Boolean	Indicates whether the discovery procedure must be skipped (<code>true</code>) or not (<code>false</code>).	Optional	61.0
skipWaterfall	Boolean	Indicates whether the price waterfall must be skipped in the output response (<code>true</code>) or not (<code>false</code>).	Optional	60.0
taggedData	Boolean	Indicates whether the JSON data string can specify tags in the input instead of attributes (<code>true</code>) or not (<code>false</code>).	Optional	60.0
useSession ScopedContext	Boolean	Indicates whether a session scoped context must be created (<code>true</code>) or request scoped context (<code>false</code>). The default is <code>false</code> .	Optional	60.0

PBE Derived Pricing Input

Input representation of the request to get the source product for the Price Book Entry (PBE) derived pricing.

JSON example

```
{
  "productId": "01txx0000006i2SAAQ",
  "pricebookEntryId": "01uxx0000008yYcAAI",
  "effectiveFrom": "2020-01-01T22:53:20.000Z",
  "effectiveTo": "2021-01-01T22:53:20.000Z"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
effectiveFrom	String	Date from when the price book entry is effective.	Required	61.0
effectiveTo	String	Date until when the price book entry is effective.	Required	61.0
pricebook EntryId	String	ID of the price book entry.	Required	61.0
productId	String	ID of the price book.	Required	61.0

Pricing Input

Input representation of the details of a Pricing API request.

JSON example

```

{
  "contextDefinitionId": "110xx0000006PdxEAE",
  "contextMappingId": "11jxx0000004LDDAA2",
  "jsonDataString": {
    "Cart": [
      {
        "id": "cart_1001",
        "cart_id": "cart_1001",
        "PriceBookId": "PriceBookId_1001",
        "businessObjectType": "Cart",
        "CartItem": [
          {
            "id": "lineItem_1001",
            "line_item_id": "lineItem_1001",
            "Quantity": 7,
            "PriceType": "OneTime",
            "Frequency": "",
            "UOM": "",
            "businessObjectType": "CartItem",
            "product_id": "01txx0000006i44AAA",
            "UnitPrice": 6.8,
            "NetUnitPrice": 0,
            "Attribute": [
              {
                "name": "Color",
                "code": "RED",
                "isPriceImpacting": true,
                "businessObjectType": "Attribute",
                "id": "Attribute_1001",
                "attribute_id": "Attribute_1001"
              },
              {
                "name": "Size",
                "code": "10INCH",
                "isPriceImpacting": true,
                "businessObjectType": "Attribute",
                "id": "Attribute_1002",
                "attribute_id": "Attribute_1002"
              }
            ]
          },
          {
            "id": "lineItem_1002",
            "line_item_id": "lineItem_1002",
            "quantity": 3,
            "PriceType": "OneTime",
            "Frequency": "",
            "UOM": "",
            "businessObjectType": "CartItem",
            "product_id": "01txx0000006i2SAAQ",
            "unitprice": 6,
            "NetUnitPrice": 0,

```



```

    "Attribute": [
      {
        "name": "Color",
        "code": "BLUE",
        "isPriceImpacting": true,
        "businessObjectType": "Attribute",
        "id": "Attribute_1003",
        "attribute_id": "Attribute_1003"
      },
      {
        "name": "Size",
        "code": "6INCH",
        "isPriceImpacting": true,
        "businessObjectType": "Attribute",
        "id": "Attribute_1004",
        "attribute_id": "Attribute_1004"
      }
    ]
  }
}
]
}
},
"pricingProcedureId": "9QMxx0000004CKKGA2",
"configurationOverrides": {
  "skipWaterfall": true,
  "useSessionScopedContext": true,
  "persistContext": true,
  "referenceKey": "referenceKey-12345",
  "displayContext" : false,
  "taggedData": false,
  "isHighVolumeLineItems": false
}
}
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
configuration Overrides	Configuration Override Input	Parameters to override the pricing configuration.	Optional	60.0
context DefinitionId	String	ID of the context definition that defines the structure of the input data.	Required	60.0
context MappingId	String	ID of the context mapping that maps the input data to the context instance.	Required	60.0
jsonData String	String	Data to hydrate the context, which must be in JSON format and passed as String. Pass the JSON data as	Required	60.0

Name	Type	Description	Required or Optional	Available Version
		String by using the stringify() method to convert the object to string. The keys in the jsonDataString property must be in accordance to the contextMappingId property sent in the request.		
pricing ProcedureId	String	ID or API name of the pricing procedure used for calculating the prices. A pricing procedure is represented as an Expression Set Definition in the system.	Optional	60.0

Pricing Recipe Input

Input representation to set up a pricing recipe page.

JSON example

```
{
  "recipeId" : "12Gxx0000005J9MEAU",
  "pricingRecipeLookUpTableInputRepresentations": [
    {
      lookupId: "12Gxx0000005J9MEAU",
      pricingComponentType: "CustomDiscount"
    },
    {
      lookupId: "12Gxx0000005J9MEAU",
      pricingComponentType: "CustomDiscount"
    }
  ],
  "pricingRecipeProcedureInputRepresentation" : {
    "procedureId" : "9QLxx0000004C92GAE"
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
pricing RecipeLookUp TableInput Representations	Pricing Recipe LookUp Table Input[]	Input representation of the recipe mapping.	Required	60.0

Name	Type	Description	Required or Optional	Available Version
pricingRecipe Procedure Input Representation	Pricing Recipe Procedure Input	Input representation of the procedure that's used in the pricing recipe.	Required	60.0
recipeId	String	ID of the pricing recipe.	Required	60.0

Pricing Recipe LookUp Table Input

Input representation of the lookup tables for the setup page recipe.

JSON example

```

"pricingRecipeLookUpTableInputRepresentations": [
  {
    lookupId: "12Gxx0000005J9MEAU",
    pricingComponentType: "CustomDiscount"
  },
  {
    lookupId: "12Gxx0000005J9MEAU",
    pricingComponentType: "CustomDiscount"
  }
]

```

Properties

Name	Type	Description	Required or Optional	Available Version
lookupTableId	String	ID of the decision table.	Optional	60.0
pricing ComponentType	String	Pricing component types such as volume discount, custom discount, attribute-based discount, and bundle-based discount.	Optional	60.0

Pricing Recipe Procedure Input

Input representation of the procedure for the setup page recipe.

JSON example

```

"pricingRecipeProcedureInputRepresentation" : {
  "procedureId" : "9QLxx0000004C92GAE"
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
procedureId	String	ID of the expression set.	Required	60.0

Pricing Request Input

Input representation of a pricing request.

JSON example

```
{
  "configurationOverrides": {
    "skipWaterfall": true,
    "useSessionScopedContext": true,
    "persistContext": true,
    "taggedData": false
  }
  "procedureName": "ES1"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
configuration Overrides	Configuration Override Input	Parameters to override pricing configuration.	Optional	60.0
procedureName	String	Name of the pricing procedure.	Optional	60.0

Pricing Versioned Revision Details Input

Input representation of the versioned revision details.

JSON example

This example shows the input for versioned revision details for attribute-based adjustment.

```
{
  "entityName": "AttributeBasedAdjustment",
  "id": "entityId",
  "priceAdjustmentId": "priceAdjustmentScheduleId",
  "productId": "ProductId",
  "productSellingModelId": "PsmId",
  "adjustmentType": "AdjustmentType",
  "adjustmentValue": "AdjustmentValue (Numeric) ",
  "effectiveFrom": "EffectiveFrom date",
  "effectiveTo": "EffectiveTo Date",
  "additionalFieldsToValueMap": {
```

```

    "attributeBasedAdjRuleId": "AttributeBasedAdjRuleId"
  }
}

```

This example shows the input for versioned revision details for bundle-based adjustment.

```

{
  "entityName": "BundleBasedAdjustment",
  "id": "entityId",
  "priceAdjustmentScheduleId": "priceAdjustmentScheduleId",
  "productId": "ProductId",
  "productSellingModelId": "PsmId",
  "adjustmentType": "AdjustmentType",
  "adjustmentValue": "AdjustmentValue (Numeric)",
  "effectiveFrom": "EffectiveFrom date",
  "effectiveTo": "EffectiveTo Date",
  "additionalFieldsToValueMap": {
    "rootBundleId": "RootBundleId",
    "parentProductId": "ParentProductId"
  }
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
additionalFieldsToValueMap	Map<String, String>	Map containing the additional fields specific to the entity.	Optional	60.0
adjustmentType	String	Adjustment type such as, percentage, amount, or override.	Required	60.0
adjustmentValue	String	Value for the adjustment.	Required	60.0
effectiveFrom	String	Date from when the adjustment is effective.	Required	60.0
effectiveTo	String	Date until when the adjustment is effective.	Optional	60.0
entityName	String	Name of the entity such as AttributeBasedAdjustment entity or BundleBasedAdjustment entity.	Required	60.0
id	String	ID of the record.	Required	60.0
priceAdjustmentScheduleId	String	ID of the price adjustment schedule record.	Required	60.0
productId	String	Product ID of the record.	Required	60.0

Name	Type	Description	Required or Optional	Available Version
product Selling ModelId	String	Product selling model ID associated to the record.	Optional	60.0

Pricing Waterfall Input

Input representation of the pricing waterfall details.

JSON example

```

"waterfall": [{
  "fieldToTagNameMapping": {
    "Product2Id": "ItemProduct",
    "Subtotal": "Subtotal",
    "Pricebook2Id": "Pricebook",
    "Quantity": "ItemQuantity",
    "LineItemId": "SalesTransactionSource",
    "ListPrice": "ItemListPrice"
  },
  "inputParameters": {
    "Product2Id": "01txx0000006i44AAA",
    "Pricebook2Id": "01sxx0000005q9xAAA",
    "Quantity": 5,
    "LineItemId": "item1"
  },
  "outputParameters": {
    "Subtotal": 50,
    "ListPrice": 10
  },
  "pricingElement": {
    "adjustments": [{
      "AdjustmentValue": "95.00",
      "AdjustmentType": "Amount"
    }],
    "description": null,
    "elementType": "ListPrice",
    "name": "List Price"
  },
  "sequence": 1
},
{
  "fieldToTagNameMapping": {
    "PriceAdjustmentScheduleId": "ItemDescription",
    "NetUnitPrice": "ItemNetUnitPrice",
    "Product2Id": "ItemProduct",
    "LowerBound": "ItemQuantity",
    "UpperBound": "ItemQuantity",
    "Subtotal": "Subtotal",
    "Quantity": "ItemQuantity",
    "LineItemId": "SalesTransactionSource",
  }
}

```

```

        "InputUnitPrice": "ItemListPrice"
    },
    "inputParameters": {
        "PriceAdjustmentScheduleId": "84Xxx0000004CGSEA2",
        "Product2Id": "01ttxx0000006i44AAA",
        "LowerBound": 5,
        "UpperBound": 5,
        "Quantity": 5,
        "LineItemId": "item1",
        "InputUnitPrice": 10
    },
    "outputParameters": {
        "NetUnitPrice": 8.5,
        "Subtotal": 42.5
    },
    "pricingElement": {
        "adjustments": [{
            "AdjustmentValue": "15.00",
            "AdjustmentType": "Percentage"
        }],
        "description": null,
        "elementType": "VolumeDiscount",
        "name": "Volume Discount"
    },
    "sequence": 2
}
]

```

Properties

Name	Type	Description	Required or Optional	Available Version
fieldTo TagName Mapping	Map<String, String>	Mappings of field to tag names.	Optional	60.0
input Parameters	Map<String, Object>	Input parameters of the pricing element.	Optional	60.0
output Parameters	Map<String, Object>	Output parameters of the pricing element.	Optional	60.0
pricing Element	Adjustment Details Input	Details of the pricing element.	Optional	60.0
sequence	Integer	Sequence of the pricing element execution.	Optional	60.0

Pricing Waterfall Log Input

Input representation of the request to create an explainability action log.

JSON example

```

{
  "currencyCode": "USD",
  "executionEndTimestamp": "2023-07-31T20:11:29.625Z",
  "executionId": "executionId1",
  "executionStartTimestamp": null,
  "lineItemId": "item1",
  "output": {
    "Subtotal": 38.25,
    "ListPrice": 10,
    "NetUnitPrice": 7.65
  },
  "waterfall": [{
    "fieldToTagNameMapping": {
      "Product2Id": "ItemProduct",
      "Subtotal": "Subtotal",
      "Pricebook2Id": "Pricebook",
      "Quantity": "ItemQuantity",
      "LineItemId": "SalesTransactionSource",
      "ListPrice": "ItemListPrice"
    }
  }],
  "inputParameters": {
    "Product2Id": "01ttx0000006i44AAA",
    "Pricebook2Id": "01sxx0000005q9xAAA",
    "Quantity": 5,
    "LineItemId": "item1"
  },
  "outputParameters": {
    "Subtotal": 50,
    "ListPrice": 10
  },
  "pricingElement": {
    "adjustments": [{
      "AdjustmentValue": "95.00",
      "AdjustmentType": "Amount"
    }],
    "description": null,
    "elementType": "ListPrice",
    "name": "List Price"
  },
  "sequence": 1
},
{
  "fieldToTagNameMapping": {
    "PriceAdjustmentScheduleId": "ItemDescription",
    "NetUnitPrice": "ItemNetUnitPrice",
    "Product2Id": "ItemProduct",
    "LowerBound": "ItemQuantity",
    "UpperBound": "ItemQuantity",
    "Subtotal": "Subtotal",
    "Quantity": "ItemQuantity",
    "LineItemId": "SalesTransactionSource",
  }
}

```



```

        "InputUnitPrice": "ItemListPrice"
    },
    "inputParameters": {
        "PriceAdjustmentScheduleId": "84Xxx0000004CGSEA2",
        "Product2Id": "01ttxx0000006i44AAA",
        "LowerBound": 5,
        "UpperBound": 5,
        "Quantity": 5,
        "LineItemId": "item1",
        "InputUnitPrice": 10
    },
    "outputParameters": {
        "NetUnitPrice": 8.5,
        "Subtotal": 42.5
    },
    "pricingElement": {
        "adjustments": [{
            "AdjustmentValue": "15.00",
            "AdjustmentType": "Percentage"
        }],
        "description": null,
        "elementType": "VolumeDiscount",
        "name": "Volume Discount"
    },
    "sequence": 2
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
context Definition VersionId	String	Context definition version ID of the pricing procedure.	Optional	60.0
context MappingId	String	Context mapping ID of the pricing procedure.	Optional	60.0
currencyCode	String	Currency code such as, USD or INR.	Optional	60.0
executionEnd Timestamp	String	End timestamp of procedure execution.	Optional	60.0
executionId	String	Execution ID for a particular execution of a pricing procedure.	Required	60.0
execution Start Timestamp	String	Start timestamp of procedure execution.	Optional	60.0

Name	Type	Description	Required or Optional	Available Version
lineItemId	String	Line item ID for which the price is being calculated.	Required	60.0
output	Map<String, Object>	Output of the pricing procedure.	Optional	60.0
waterfall	Pricing Waterfall Input[]	Details of the pricing waterfall.	Required	60.0

Procedure Plan Criterion Input

Input representation of the details of a procedure plan criterion.

JSON example

```

"procedurePlanCriterion": [
  {
    "conditionSequence": 1,
    "fieldObject": "BillingCountry",
    "fieldPath": "BillingCountry",
    "literalValue": "test",
    "operator": "Equals",
    "dataType": "Text"
  },
  {
    "conditionSequence": 2,
    "fieldObject": "BillingPostalCode",
    "fieldPath": "BillingPostalCode",
    "literalValue": "sample",
    "operator": "Equals",
    "dataType": "Text"
  },
  {
    "conditionSequence": 3,
    "fieldObject": "LastActivityDate",
    "fieldPath": "LastActivityDate",
    "literalValue": "2024-07-14",
    "operator": "LessThan",
    "dataType": "Date"
  }
]

```

Properties

Name	Type	Description	Required or Optional	Available Version
condition Sequence	Integer	Sequence to be followed to process the conditions defined in the procedure plan option.	Required	62.0

Name	Type	Description	Required or Optional	Available Version
		This property value must be unique within a procedure plan option.		
dataType	String	Data type of the field from the selected object.	Required	62.0
fieldObject	String	Value of the object field that's used to resolve the procedure plan option. This property value must belong to the primary object that's associated with the procedure plan definition, at a maximum two levels up in the hierarchy.	Required	62.0
fieldPath	String	Path of the field that's used in a procedure in relation to the object that the field belongs to. The field path must end with the object field that's associated with the procedure plan criterion.	Required	62.0
literalValue	String	User-defined value that's compared to the value of the sObject field value.	Optional	62.0
operator	String	Operator that's used by the procedure plan criterion.	Required	62.0
recordId	String	ID of the procedure plan criterion record.	Required	62.0

Procedure Plan Definition Input

Input representation of the details of a procedure plan definition.

JSON example

This example shows a sample request to create a procedure plan definition record by using the Procedure Plan Definitions (POST) API.

```
{
  "description": "Definition for Quote",
  "developerName": "Quote_Definition_Sample",
  "name": "Quote_Definition_Sample",
  "processType": "Default",
  "primaryObject": "BusinessHours",
  "procedurePlanDefinitionVersions": [
    {
      "active": false,
      "contextDefinition": "SalesTransactionContext_stdctx",
      "readContextMapping": "QuoteEntitiesMapping",
      "saveContextMapping": "QuoteEntitiesMapping",
    }
  ]
}
```

```

    "effectiveFrom": "2024-07-15T10:15:30.000Z",
    "developerName": "Quote_Definition_V1",
    "rank": 1
  }
]
}

```

This example shows a sample request to update a procedure plan definition by using the Procedure Plan Definition By ID (PATCH) API.



Note: The properties that aren't specified in the input are deleted when updating the record.

```

{
  "description": "Default definition patch update",
  "developerName": "Quote_Definition",
  "name": "Quote_Definition",
  "primaryObject": "Quote",
  "recordId": "1FNxx0000004EsOGAU"
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
description	String	Description of the procedure plan definition.	Optional	62.0
developerName	String	Developer name of the procedure plan definition.	Required if you're invoking the Procedure Plan Definitions API (POST) .	62.0
name	String	Name of the procedure plan definition.	Optional	62.0
primaryObject	String	Source object that's used to create a procedure with rule-based criteria. This property value must be a valid object name and must be unique in the ProcedurePlanDefinition object.	Required if you're invoking the Procedure Plan Definitions API (POST) and if you're creating a procedure with rule-based criteria.	62.0
procedurePlan Definition Versions	Procedure Plan Definition Version Input[]	List of versions of a procedure plan definition.	Required	62.0
processType	String	Specifies the business processes that need a procedure plan for each sObject and definition. Valid values are: <ul style="list-style-type: none"> • Billing 	Required	63.0

Name	Type	Description	Required or Optional	Available Version
		<ul style="list-style-type: none"> • DRO • DeepClone • ProductDiscovery • Revenue Cloud <p>These values can be used based on the available license. If unspecified, the value is set to Default.</p>		
recordId	String	ID of the procedure plan definition record.	Required if you're invoking the Procedure Plan Definition By ID API (PATCH) .	62.0

Procedure Plan Definition Version Input

Input representation of the details of a procedure plan definition version.

JSON example

```
{
  "active": false,
  "developerName": "sample_version_input",
  "effectiveFrom": "2024-07-09T00:00:00.000Z",
  "contextDefinition": "SalesTransactionContext__stdctx",
  "procedurePlanSections": [
    {
      "isInherited": false,
      "procedurePlanOptions": [
        {
          "saveContextMapping": "AssetToSalesTransactionMapping",
          "expressionSetDefinition": "9QAZ60000004ECCOA2",
          "expressionSetLabel": "Revenue_Default_Pricing_Procedure",
          "expressionSetApiName": "Revenue Default Pricing Procedure",
          "logic": "1 AND 2 AND 3",
          "priority": 1,
          "procedurePlanCriterion": [
            {
              "conditionSequence": 1,
              "fieldObject": "BillingCountry",
              "fieldPath": "BillingCountry",
              "literalValue": "test",
              "operator": "Equals",
              "dataType": "Text"
            },
            {
              "conditionSequence": 2,
              "fieldObject": "BillingPostalCode",

```

```

        "fieldPath": "BillingPostalCode",
        "literalValue": "sample",
        "operator": "Equals",
        "dataType": "Text"
      },
      {
        "conditionSequence": 3,
        "fieldObject": "LastActivityDate",
        "fieldPath": "LastActivityDate",
        "literalValue": "2024-07-14",
        "operator": "LessThan",
        "dataType": "Date"
      }
    ]
  },
  "resolutionType": "RuleBased",
  "sectionType": "PricingProcedure",
  "sequence": 1,
  "subSectionType": "PricingProcedure",
  "recordId": "1FRZ600000080IAOA2"
}
],
"rank": 1,
"readContextMapping": "ProductDiscoveryContextMapping",
"saveContextMapping": "OrderEntitiesMapping"
}

```

 **Note:** The properties that aren't specified in the input are deleted when updating the record.

Properties

Name	Type	Description	Required or Optional	Available Version
active	Boolean	Indicates whether this procedure plan definition version is active (<code>true</code>) or not (<code>false</code>). You can't edit or delete a procedure plan version that's in the active state.	Required	62.0
context Definition	String	Context definition that's associated with the procedure plan definition version record.	Required	62.0
developerName	String	Unique developer name of the procedure plan definition version.	Required	62.0
effectiveFrom	String	Date and time from when the procedure plan definition version comes into effect.	Required	62.0
effectiveTo	String	Date and time from when the procedure plan definition version is no longer in effect.	Required	62.0

Name	Type	Description	Required or Optional	Available Version
<code>inheritedFrom</code>	String	Template this procedure plan definition version is created from.	This property is read-only.	62.0
<code>procedurePlanSections</code>	Procedure Plan Section Input []	<p>Procedure setup sections for a procedure plan definition. Each section enables the setup of a procedure type by using a rule-based criteria.</p> <p>Keep these considerations in mind when you modify this property.</p> <ul style="list-style-type: none"> You can edit or delete a procedure plan section if it isn't associated with an active procedure plan version. You can create a procedure plan section with rule-based resolution type if the primary object isn't empty in the definition. 	Required	62.0
<code>rank</code>	Integer	Current rank of the procedure plan definition version that's used to decide the sequence of execution of a procedure plan definition version.	Required	62.0
<code>readContextMapping</code>	String	<p>Mapping that's used to read data from the mapped object and populate the context definition.</p> <p>This property value must be associated with a context definition.</p>	Optional	62.0
<code>recordId</code>	String	ID of the procedure plan definition version record.	Required	62.0
<code>saveContextMapping</code>	String	<p>Mapping that's used to save data from the context definition and populate the mapped object.</p> <p>This property value must be associated with a context definition.</p>	Optional	62.0
<code>status</code>	String	Status of the procedure plan definition version record.	Optional	62.0

Procedure Plan Evaluation Input

Input representation of the details used to evaluate a procedure plan definition.

JSON example

This example shows a sample request to evaluate a procedure plan definition by using a primary object.

```
{
  "idList": ["a01DU000000BylcYAC"],
  "evaluationDate": "2024-07-08T10:15:30.000Z",
  "processType": "Default",
  "sectionType": ["PricingProcedure"],
  "subSectionType": ["Revenue"]
}
```

This example shows a sample request to evaluate a procedure plan definition by using a definition name.

```
{
  "evaluationDate": "2024-07-08T10:15:30.000Z",
  "processType": "Default",
  "sectionType": ["PricingProcedure"],
  "subSectionType": ["Revenue"]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
evaluationDate	String	Date when the evaluation is applicable. This property value must be within the date range when the procedure plan definition is effective.	Required	62.0
idList	String[]	List of record IDs of the procedure plan definitions to be evaluated.	Required only if you're invoking the Procedure Plan Evaluation By Object (POST) API .	62.0
processType	String	Specifies the business processes that need a procedure plan for each sObject and definition. Valid values based on the available are: <ul style="list-style-type: none"> • Billing • DRO • DeepClone • ProductDiscovery • Revenue Cloud These values can be used based on the available license. If unspecified, the value is set to <code>Default</code> . If a procedure plan definition exist in the org with <code>processType</code> value as <code>null</code> , modify the value to <code>Default</code> .	Optional	63.0

Name	Type	Description	Required or Optional	Available Version
sectionType	String[]	Name of section to be evaluated. Valid values are: <ul style="list-style-type: none"> • PricingProcedure • ProductDiscoveryProcedure • ProductQualificationProcedure • PricingDiscoveryProcedure • DiscountSpreadServiceProcedure • RatingProcedure • Custom • RatingDiscoveryProcedure 	Optional	62.0
subSectionType	String[]	Name of subsection to be evaluated.	Optional	62.0

The combination of the `sectionType` and `subSectionType` property values must be unique for every procedure plan version.

Procedure Plan Section Input

Input representation of the details of a procedure plan section.

JSON example

```
"procedurePlanSections": [
  {
    "isInherited": false,
    "procedurePlanOptions": [
      {
        "saveContextMapping": "AssetToSalesTransactionMapping",
        "expressionSetDefinition": "9QAZ60000004ECCOA2",
        "expressionSetLabel": "Revenue_Default_Pricing_Procedure",
        "expressionSetApiName": "Revenue Default Pricing Procedure",
        "logic": "1 AND 2 AND 3",
        "priority": 1,
        "procedurePlanCriterion": [
          {
            "conditionSequence": 1,
            "fieldObject": "BillingCountry",
            "fieldPath": "BillingCountry",
            "literalValue": "test",
            "operator": "Equals",
            "dataType": "Text"
          },
          {
            "conditionSequence": 2,
            "fieldObject": "BillingPostalCode",
            "fieldPath": "BillingPostalCode",
            "literalValue": "sample",
```

```

        "operator": "Equals",
        "dataType": "Text"
      },
      {
        "conditionSequence": 3,
        "fieldObject": "LastActivityDate",
        "fieldPath": "LastActivityDate",
        "literalValue": "2024-07-14",
        "operator": "LessThan",
        "dataType": "Date"
      }
    ]
  },
  ],
  "resolutionType": "RuleBased",
  "sectionType": "PricingProcedure",
  "sequence": 1,
  "subsectionType": "PricingProcedure",
  "recordId": "1FRZ600000080IAOA2"
}
]

```

Properties

Name	Type	Description	Required or Optional	Available Version
isInherited	Boolean	Indicates whether the procedure plan section is inherited from a template (true) or not (false).	This property is read-only.	62.0
procedurePlan Options	Procedure Plan Option Input[]	List of procedure plan options that defines a group of criteria. You can edit or delete a procedure plan option only if it isn't associated with an active procedure plan version.	Required	62.0
recordId	String	ID of the procedure plan section record.	Required	62.0
resolution Type	String	Type of resolution used to filter the procedure. You can't edit this property value if the procedure plan section includes a procedure plan option record.	Required	62.0
sectionType	String	Type of section. Valid values are: <ul style="list-style-type: none"> • PricingProcedure • ProductDiscoveryProcedure • ProductQualificationProcedure • PricingDiscoveryProcedure • DiscountSpreadServiceProcedure • RatingProcedure 	Required	62.0

Name	Type	Description	Required or Optional	Available Version
		<ul style="list-style-type: none"> • Custom • RatingDiscoveryProcedure 		
sequence	Integer	Sequence to be followed for the processing of the procedures. This property value must be greater than 0 and must be unique for a procedure plan section associated with a procedure plan version.	Required	62.0
subSection Type	String	Procedure subsection added to the procedure plan definition.	Required	62.0

Procedure Plan Option Input

Input representation of the details of a procedure plan option.

JSON example

```
"procedurePlanOptions": [
  {
    "saveContextMapping": "AssetToSalesTransactionMapping",
    "expressionSetDefinition": "9QAZ60000004ECCOA2",
    "expressionSetLabel": "Revenue_Default_Pricing_Procedure",
    "expressionSetApiName": "Revenue Default Pricing Procedure",
    "logic": "1 AND 2 AND 3",
    "priority": 1,
    "procedurePlanCriterion": [
      {
        "conditionSequence": 1,
        "fieldObject": "BillingCountry",
        "fieldPath": "BillingCountry",
        "literalValue": "test",
        "operator": "Equals",
        "dataType": "Text"
      },
      {
        "conditionSequence": 2,
        "fieldObject": "BillingPostalCode",
        "fieldPath": "BillingPostalCode",
        "literalValue": "sample",
        "operator": "Equals",
        "dataType": "Text"
      },
      {
        "conditionSequence": 3,
        "fieldObject": "LastActivityDate",
        "fieldPath": "LastActivityDate",
        "literalValue": "2024-07-14",
        "operator": "LessThan",
        "dataType": "Date"
      }
    ]
  }
]
```

```

    }
  ]
}
]

```

Properties

Name	Type	Description	Required or Optional	Available Version
expressionSet ApiName	String	API name of the expression set.	Optional	62.0
expressionSet Definition	String	Expression set definition that's associated with this procedure plan option record.	Required	62.0
expressionSet Label	String	Label of the expression set that's associated with this procedure plan option record.	Optional	62.0
logic	String	Computation logic for the conditions applied to a procedure plan option. This property value must be blank if the resolution type is default.	Optional	62.0
priority	Integer	Priority for the specified criteria. This property value must be greater than 0 and must be unique within a procedure plan section.	Required	62.0
procedurePlan Criterion	Procedure Plan Criterion Input[]	Details of the rule-based criteria for the procedure. You can edit or delete a procedure plan criterion only if it isn't associated with an active procedure plan version.	Optional	62.0
readContext Mapping	String	Mapping that's used to read from the mapped object and populate the context definition. This property value must be associated with a context definition.	Optional	62.0
recordId	String	ID of the procedure plan option record.	Required	62.0
saveContext Mapping	String	Mapping that's used to save data from the context definition and populate the mapped object. This property value must be associated with a context definition.	Optional	62.0

Response Bodies

Learn more about the available Salesforce Pricing API response bodies.

[Adjustment Details](#)

Output representation of a pricing adjustment request.

[API Execution Log Response](#)

Output representation of the execution log of a pricing waterfall request.

[Line Item Waterfall Response](#)

Output representation of the line item waterfall response.

[PBE Derived Pricing](#)

Output representation of the response that includes the source product for the Price Book Entry (PBE) derived pricing.

[Pricing Error Response](#)

Output representation of the pricing error response.

[Pricing Execution Waterfall Response](#)

Output representation of the execution process that's associated with a pricing waterfall.

[Pricing Generic Response](#)

Output representation of a pricing data sync request.

[Pricing Output](#)

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[Pricing Recipe LookUp Table Response](#)

Output representation of a pricing recipe lookup table.

[Pricing Recipe](#)

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Output representation of the pricing recipe.

[Pricing Response](#)

Output representation of the pricing request.

[Pricing Result](#)

Output representation of the pricing result.

[Pricing Result Error](#)

Output representation of the pricing result error.

[Pricing Versioned Revision Details](#)

Output representation of the versioned revision details.

[Pricing Waterfall Response](#)

Output representation of a pricing waterfall request.

[Procedure Plan Criterion](#)

Output representation of the details of a procedure plan criterion.

[Procedure Plan Definition](#)

Output representation of the details of a single procedure plan definition.

[Procedure Plan Definition Version](#)

Output representation of the version details of a procedure plan definition.

[Procedure Plan Definitions](#)

Output representation of the details of procedure plan definitions.

[Procedure Plan Generic](#)

Output representation of the details of the created procedure plan definition record.

[Procedure Plan Generic Error](#)

Output representation of the error details related to the procedure plan definitions.

[Procedure Plan Option](#)

Output representation of the details of a procedure plan option.

[Procedure Plan Section](#)

Output representation of the details of a procedure plan section.

[Procedure Plan Section Evaluation Runtime](#)

Output representation of the results from the procedure plan evaluation.

[Procedure Plan Evaluation](#)

Output representation of the evaluation details of a procedure plan definition.

[Procedure Plan Evaluation Response](#)

Output representation of the evaluation details of a procedure plan definition.

[Procedure Plan Evaluation Result](#)

Output representation of the evaluation result of a procedure plan definition.

[Pricing Process Execution Details for Line Items](#)

Output representation of the pricing process execution details for the line items along with the error details and response generation status.

[Line Item Details Response](#)

Output representation of the pricing process execution details for the line items.

[Pricing Process Execution Response](#)

Output representation of the details of a pricing process execution.

[Pricing Process Execution List](#)

Output representation of the execution details for different types of the pricing processes.

[Pricing Simulation Input Variables With Data](#)

Output representation of the pricing simulation variables with data.

Adjustment Details

Output representation of a pricing adjustment request.

JSON example

```
"pricingElement": {  
  "adjustments": [{
```

```

    "adjustmentType": null,
    "adjustmentValue": null
  }],
  "name": "List Price",
  "elementType": "ListPrice"
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
adjustments	Map<String, Object>[]	Details of the pricing element.	Small, 60.0	60.0
description	String	Description of the pricing element.	Small, 60.0	60.0
elementType	String	Type of the pricing element.	Small, 60.0	60.0
name	String	Name of the pricing element.	Small, 60.0	60.0

API Execution Log Response

Output representation of the execution log of a pricing waterfall request.

JSON example

```

{
  "message": {The Pricing API execution was successful.},
  "pricingElement": {
    "adjustments": [
      {
        "adjustmentType": null,
        "adjustmentValue": null
      }
    ],
    "name": "List Price",
    "elementType": "ListPrice"
  }
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
message	String []	Message of the API execution.	Small, 63.0	63.0
pricingElement	Adjustment Details	Details of the price adjustment of a pricing element.	Small, 63.0	63.0

Line Item Waterfall Response

Output representation of the line item waterfall response.

JSON example

```

{
  "currencyCode": "USD",
  "error": null,
  "executionEndTimestamp": "2023-07-31T20:11:29.625Z",
  "executionId": "gdLVwn2xluats2xWMAjV",
  "executionStartTimestamp": null,
  "lineItemId": "item1",
  "success": true,
  "usageType": "Pricing",
  "output": {
    "quantity": "10",
    "netUnitPrice": "10",
    "subtotal": "100"
  },
  "waterfall": []
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
context Definition VersionId	String	Context definition version ID of the pricing procedure.	Small, 60.0	60.0
context MappingId	String	Context mapping ID of the record.	Small, 60.0	60.0
currencyCode	String	Currency code. For example, USD or INR.	Small, 60.0	60.0
error	Pricing Error Response	Details of any errors.	Small, 60.0	60.0
executionEnd Timestamp	String	End timestamp of procedure execution.	Small, 60.0	60.0
executionId	String	Execution ID of a particular execution of a pricing procedure.	Small, 60.0	60.0
execution Start Timestamp	String	Start timestamp of procedure execution.	Small, 60.0	60.0
lineItemId	String	Line item ID for which the price is being calculated.	Small, 60.0	60.0
output	Map<String, Object>	Output of the pricing procedure.	Small, 60.0	60.0
success	Boolean	Indicates whether the API request is successful (<code>true</code>) or not (<code>false</code>).	Small, 60.0	60.0
usageType	String	Usage type of the waterfall log record.	Small, 62.0	62.0

Property Name	Type	Description	Filter Group and Version	Available Version
waterfall	Pricing Waterfall Response[]	Details of the price waterfall.	Small, 60.0	60.0

PBE Derived Pricing

Output representation of the response that includes the source product for the Price Book Entry (PBE) derived pricing.

JSON example

```
{
  "productId": "01txx0000006i2SAAQ",
  "pricebookEntryId": "01uxx0000008yYcAAI",
  "effectiveFrom": "2020-01-01T22:53:20.000Z",
  "effectiveTo": "2021-01-01T22:53:20.000Z"
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
error	Pricing Error Response[]	Displays the error while processing the request.	Small, 61.0	61.0
isSuccess	Boolean	Indicates whether the request is successful (<code>true</code>) or not (<code>false</code>).	Small, 61.0	61.0
source ProeductId	String	ID of the source product.	Small, 61.0	61.0

Pricing Error Response

Output representation of the pricing error response.

Property Name	Type	Description	Filter Group and Version	Available Version
errorCode	String	Indicates the error code.	Small, 60.0	60.0
message	String	Specifies the message stating the reason for the error, if any.	Small, 60.0	60.0

Pricing Execution Waterfall Response

Output representation of the execution process that's associated with a pricing waterfall.

JSON example

```
{
  "apiExecutionId": "263369316770986",
  "apiExecutionLogRepresentationList": [
```

```

    {
      "message": [
        "The Pricing API couldn't be run. Try again, and if the issue persists, ask your
        admin for help."
      ]
    }
  ],
  "executionId": "263369316895959",
  "referenceKey": "referenceKey-ABCD",
  "success": false,
  "usageType": "Api_Execution"
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
apiExecutionId	String	Unique execution ID that's generated each time a pricing API is executed.	Small, 63.0	Small, 63.0
apiExecutionLogRepresentationList	API Execution Log Response[]	List of API execution logs.	Small, 63.0	63.0
error	Pricing Error Response	Error details of the pricing execution process.	Small, 63.0	Small, 63.0
executionId	String	Unique ID that's generated each time a pricing process is executed.	Small, 63.0	Small, 63.0
referenceKey	String	The reference ID that a consuming workstream provides in the API to search for the specific logs in the Pricing Operations Console.	Small, 63.0	Small, 63.0
success	Boolean	Indicates whether the API execution is successful (<code>true</code>) or not (<code>false</code>).	Small, 63.0	Small, 63.0
usageType	String	Usage type of the API execution.	Small, 63.0	Small, 63.0

Pricing Generic Response

Output representation of a pricing data sync request.

JSON example

```

{
  "success": true
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
error	Pricing Error Response	Details from the pricing error response.	Small, 60.0	60.0
success	Boolean	Indicates whether the request is successful (<code>true</code>) or not (<code>false</code>).	Small, 60.0	60.0

Pricing Output

Output representation of a Salesforce pricing request.

JSON example

```
{
  "apiExecutionId": "612228038743152",
  "pricingExecutionId": "612229738898095",
  "pricingResult": {
    "subtotal": [
      {
        "dataPath": [
          "cart_1001",
          "lineItem_1002"
        ],
        "value": 300.0,
        "errors": [],
        "isSuccess": true
      },
      {
        "dataPath": [
          "cart_1001",
          "lineItem_1001"
        ],
        "value": 400.0,
        "errors": [],
        "isSuccess": true
      }
    ],
    "netunitprice": [
      {
        "dataPath": [
          "cart_1001",
          "lineItem_1002"
        ],
        "value": xx,
        "errors": [],
        "isSuccess": true
      },
      {
        "dataPath": [
          "cart_1001",
          "lineItem_1001"
        ],

```

```

"value": xx,
"errors": [],
"isSuccess": true
}
],
},
"pricingResultErrors": [],
"status": "Completed",
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
apiExecutionId	String	Unique ID that's generated each time a pricing API is executed.	Small, 63.0	63.0
error	Pricing Error Response	Displays the error encountered when the request is processed. For example, a pricing procedure isn't found.	Small, 60.0	60.0
pricingExecutionId	String	Unique ID that's generated each time a pricing process is executed.	Small, 63.0	63.0
pricingResult	Pricing Result	Represents the outcomes associated with the output tags defined in the contextual definition for which the pricing engine establishes values. The initial attribute name is substituted for the output tag's designation. For instance, if the original attribute name specified in the Context Definition is "Subtotal," but during contextual setup, the output tag is denoted as "Total Price," the API output exhibits the initial attribute name "Subtotal" in the response.	Small, 60.0	60.0
pricingResultErrors	Pricing Result Error[]	Errors from the pricing request, if any.	Small, 60.0	60.0
status	String	Status of the pricing request. Valid values are: <ul style="list-style-type: none"> Completed — Pricing is completed for all the line items. Partially Completed — Pricing is completed for some line items. Failed — Pricing isn't completed for the line items. 	Small, 60.0	60.0

Pricing Recipe LookUp Table Response

Output representation of a pricing recipe lookup table.

JSON example

```

"decisionTables": [
  {
    "id": "01Dxx00000000T3EAI",
    "isInternal": true,
    "pricingComponentType": "ListPrice"
  },
  {
    "id": "01Dxx00000000T4EAI",
    "isInternal": true,
    "pricingComponentType": "VolumeDiscount"
  },
  {
    "id": "01Dxx00000000H1EAI",
    "isInternal": false,
    "pricingComponentType": "CustomDiscount"
  }
]

```

Property Name	Type	Description	Filter Group and Version	Available Version
id	String	ID of the pricing recipe table mapping.	Small, 60.0	60.0
isInternal	Boolean	Indicates if the decision table is available (true) or not (false).	Small, 60.0	60.0
pricing ComponentType	String	Price component types such as, custom discount, volume discount, attribute-based discount, bundle-based discount, and list price.	Small, 60.0	60.0

Pricing Recipe

Output representation of the pricing recipe information table.

JSON example

```

"recipes": [
  {
    "active": false,
    "createdBy": "autoproc@00dxx0000006gmjea2",
    "createdOn": "2023-07-15T13:12:38.000Z",
    "decisionTables": [
      {
        "id": "01Dxx00000000T3EAI",
        "isInternal": true,
        "pricingComponentType": "ListPrice"
      }
    ]
  }
]

```

```

    },
    {
      "id": "01Dxx00000000T4EAI",
      "isInternal": true,
      "pricingComponentType": "VolumeDiscount"
    },
    {
      "id": "01Dxx00000000H1EAI",
      "isInternal": false,
      "pricingComponentType": "CustomDiscount"
    }
  ],
  "developerName": "NGPDefaultRecipe",
  "id": "12Gxx0000005Ka4EAE",
  "name": "NGPDefaultRecipe",
  "procedureCreatedBy": "",
  "procedureCreatedOn": "2023-09-19T11:39:18.983Z",
  "procedureId": "",
  "procedureName": ""
}]

```

Property Name	Type	Description	Filter Group and Version	Available Version
active	Boolean	Indicates whether the recipe is active (<code>true</code>) or not (<code>false</code>).	Small, 60.0	60.0
createdBy	String	Details on who created the recipe.	Small, 60.0	60.0
createdOn	String	Date when the recipe was created.	Small, 60.0	60.0
decision Tables	Pricing Recipe LookUp Table Response []	Decision tables linked to the recipe.	Small, 60.0	60.0
developerName	String	API name of the recipe.	Small, 60.0	60.0
id	String	ID of the recipe.	Small, 60.0	60.0
name	String	Name of the recipe.	Small, 60.0	60.0
procedure CreatedBy	String	Details on who created the procedure.	Small, 60.0	60.0
procedure CreatedOn	String	Date when the procedure was created.	Small, 60.0	60.0
procedureId	String	ID of the procedure.	Small, 60.0	60.0
procedureName	String	Name of the procedure.	Small, 60.0	60.0

Pricing Recipe Post

Output representation of the pricing recipe after the API request.

JSON example

```
{
  isSuccess : true
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
error	Pricing Error Response	Details from the pricing error response.	Small, 60.0	60.0
isSuccess	Boolean	Indicates whether the response was calculated successfully (<code>true</code>) or not (<code>false</code>).	Small, 60.0	60.0

Pricing Recipe Response

Output representation of the pricing recipe.

JSON example

```
{
  "recipes": [
    {
      "active": false,
      "createdBy": "autoproc@00dxx0000006gmjea2",
      "createdOn": "2023-07-15T13:12:38.000Z",
      "decisionTables": [
        {
          "id": "01Dxx00000000T3EAI",
          "isInternal": true,
          "pricingComponentType": "ListPrice"
        },
        {
          "id": "01Dxx00000000T4EAI",
          "isInternal": true,
          "pricingComponentType": "VolumeDiscount"
        },
        {
          "id": "01Dxx00000000H1EAI",
          "isInternal": false,
          "pricingComponentType": "CustomDiscount"
        }
      ],
      "developerName": "NGPDefaultRecipe",
      "id": "12Gxx0000005Ka4EAE",
      "name": "NGPDefaultRecipe",
      "procedureCreatedBy": "",
      "procedureCreatedOn": "2023-09-19T11:39:18.983Z",
      "procedureId": "",
      "procedureName": ""
    }
  ],
}
```

```

{
  "success": true
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
recipes	Pricing Recipe Output Representation []	Representation of the pricing recipe.	Small, 60.0	60.0
success	Boolean	Indicates if the request is successful (<code>true</code>) or not (<code>false</code>).	Small, 60.0	60.0

Pricing Response

Output representation of the pricing request.

JSON example

```

{
  "success": true,
  "executionId": "zu81o5hBCrFzyd5LWZk"
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
error	Pricing Error Response	Errors while processing the request, if any.	Small, 60.0	60.0
executionId	String	Auto-generated alphanumeric string for correlation to extract async waterfall and context persistence status.	Small, 60.0	60.0
success	Boolean	Indicates if the request is successful (<code>true</code>) or not (<code>false</code>).	Small, 60.0	60.0

Pricing Result

Output representation of the pricing result.

JSON example

```

"pricingResult": {
  "subtotal": [
    {
      "dataPath": [
        "cart_1001",
        "lineItem_1002"
      ],
      "value": 300.0,
      "errors": [],
    }
  ]
}

```



```

    "isSuccess": true
  },
  {
    "dataPath": [
      "cart_1001",
      "lineItem_1001"
    ],
    "value": 400.0,
    "errors": [],
    "isSuccess": true
  }
],
"netunitprice": [
  {
    "dataPath": [
      "cart_1001",
      "lineItem_1002"
    ],
    "value": xx,
    "errors": [],
    "isSuccess": true
  },
  {
    "dataPath": [
      "cart_1001",
      "lineItem_1001"
    ],
    "value": xx,
    "errors": [],
    "isSuccess": true
  }
]
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
dataPath	String	Includes the entire data route for the specific element starting from the root node. The request must include the ID to construct the accurate data route. For example, if a <code>jsonDataString</code> property comprises a Cart [<code>Id = Cart1</code>] and its associated Cart Item [<code>Id = CartItem1</code>], then the data route for <code>CartItem</code> appears as [<code>Cart1, CartItem1</code>].	Small, 60.0	60.0
errors	Pricing Error Response[]	Displays processing errors related to the element as recognized by the data path.	Small, 60.0	60.0
isSuccess	Boolean	Displays if processing of the element for the specified data path is successful or not.	Small, 60.0	60.0

Property Name	Type	Description	Filter Group and Version	Available Version
value	Object	Displays the value of the element into consideration. Element is uniquely identify by the data path.	Small, 60.0	60.0

Pricing Result Error

Output representation of the pricing result error.

JSON example

```

{
  "pricingResultErrors": {
    "Aggregateprice": [
      {
        "dataPath": [
          "cart_1001",
        ],
        "errors": [
          {
            "errorCode": "Dummy"
            "message":
          }
        ]
      }
    ]
  }
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
dataPath	String[]	Includes the entire data route for the specific element starting from the root node. The request must include the ID to construct the accurate data route. For example, if a <code>jsonDataString</code> property comprises a <code>Cart [Id = Cart1]</code> and its associated <code>Cart Item [Id = CartItem1]</code> , then the data route for <code>CartItem</code> appears as <code>[Cart1, CartItem1]</code> .	Small, 60.0	60.0
errors	Pricing Error Response	Displays processing errors related to the element as recognized by the data path.	Small, 60.0	60.0

Pricing Versioned Revision Details

Output representation of the versioned revision details.

Property Name	Type	Description	Filter Group and Version	Available Version
error	Pricing Error Response	Details from the pricing error response.	Small, 60.0	60.0
success	Boolean	Indicates whether the request is successful (true) or not (false).	Small, 60.0	60.0

Pricing Waterfall Response

Output representation of a pricing waterfall request.

JSON example

```
{
  "inputParameters": {
    "productId": "01txx0000006i2SAAQ",
    "pricebookId": "01sxx0000005ptpAAA",
    "pricingModelType": "OneTime"
  },
  "fieldToTagNameMapping": {
    "Product2Id": "ItemProduct",
    "Subtotal": "Subtotal",
    "Pricebook2Id": "Pricebook",
    "Quantity": "ItemQuantity",
    "LineItemId": "SalesTransactionSource",
    "ListPrice": "ItemListPrice"
  },
  "sequence": 0,
  "outputParameters": {
    "listPrice": "10"
  },
  "pricingElement": {
    "adjustments": [
      {
        "adjustmentType": null,
        "adjustmentValue": null
      }
    ],
    "name": "List Price"
  }
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
fieldToTagNameMapping	Map<String, String>	Mappings of field to tag names.	Small, 60.0	60.0
inputParameters	Map<String, Object>	Parameters of pricing element input.	Small, 60.0	60.0

Property Name	Type	Description	Filter Group and Version	Available Version
output Parameters	Map<String, Object>	Parameters of pricing element output.	Small, 60.0	60.0
pricing Element	Adjustment Details	Details of the price adjustment of a pricing element.	Small, 60.0	60.0
sequence	Integer	Sequence of pricing element execution.	Small, 60.0	60.0

Procedure Plan Criterion

Output representation of the details of a procedure plan criterion.

JSON example

```

"procedurePlanCriterion": [
  {
    "conditionSequence": 1,
    "dataType": "Text",
    "fieldObject": "BillingCountry",
    "fieldPath": "BillingCountry",
    "isSuccess": true,
    "literalValue": "test",
    "operator": "Equals",
    "recordId": "1FiZ60000004C9cKAE"
  },
  {
    "conditionSequence": 2,
    "dataType": "Text",
    "fieldObject": "BillingPostalCode",
    "fieldPath": "BillingPostalCode",
    "isSuccess": true,
    "literalValue": "pramit",
    "operator": "Equals",
    "recordId": "1FiZ60000004C9dKAE"
  },
  {
    "conditionSequence": 3,
    "dataType": "Date",
    "fieldObject": "LastActivityDate",
    "fieldPath": "LastActivityDate",
    "isSuccess": true,
    "literalValue": "2024-07-14",
    "operator": "LessThan",
    "recordId": "1FiZ60000004C9eKAE"
  }
]

```

Property Name	Type	Description	Filter Group and Version	Available Version
conditionSequence	Integer	Sequence to be followed to process the conditions defined in the procedure plan option.	Small, 62.0	62.0
dataType	String	Data type of the field from the selected object.	Small, 62.0	62.0
error	Procedure Plan Generic Error[]	Details of the error encountered during the processing of the API request.	Small, 62.0	62.0
fieldObject	String	Value of the object field that's used to resolve the procedure plan option.	Small, 62.0	62.0
fieldPath	String	Path of the field that's used in a procedure in relation to the object that the field belongs to.	Small, 62.0	62.0
isSuccess	Boolean	Indicates whether the API request is successful (<code>true</code>) or not (<code>false</code>).	Small, 62.0	62.0
literalValue	String	User-defined value that's compared to the value of the <code>sObject</code> field value.	Small, 62.0	62.0
operator	String	Operator that's used by the procedure plan criterion.	Small, 62.0	62.0
recordId	String	ID of the procedure plan criterion record.	Small, 62.0	62.0

Procedure Plan Definition

Output representation of the details of a single procedure plan definition.

JSON example

This example shows a sample response for the Procedure Plan Definition By ID (GET) request.

```
{
  "description": "Default Definition",
  "developerName": "Quote_Definition",
  "name": "Quote_Definition",
  "primaryObject": "Quote",
  "procedurePlanDefinitionVersions": [
    {
      "active": false,
      "contextDefinition": "110xx0000006PZ7EAM",
      "effectiveFrom": "2024-02-03T10:15:30.000Z",
      "effectiveTo": "2024-02-03T10:15:30.000Z",
      "readContextMapping": "MedicalHistoryMapping",
      "recordId": "1Cvxx0000004E1ACAU",
      "saveContextMapping": "MedicalHistoryMapping",
      "success": true,
      "processType": "Default"
    }
  ]
}
```

```

],
"recordId": "1FNxx0000004GkWGau",
"processType": "Default",
"success": true
}

```

This example shows a sample response for the Procedure Plan Definition By ID (PATCH) request.

```

{
  "procedurePlanDefinitionVersions": [],
  "recordId": "1FNDU00000000EX4AY",
  "processType": "Default",
  "success": true
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
description	String	Description for the procedure plan definition.	Small, 62.0	62.0
developerName	String	Developer name of the procedure plan definition.	Small, 62.0	62.0
error	Procedure Plan Generic Error[]	Details of the error encountered during the processing of the API request.	Small, 62.0	62.0
name	String	Name of the procedure plan definition.	Small, 62.0	62.0
primaryObject	String	Object that's associated with the procedure plan definition.	Small, 62.0	62.0
procedurePlan Definition Versions	Procedure Plan Definition Version[]	Details of the versions of a procedure plan definition.	Small, 62.0	62.0
processType	String	Business processes that's specified that requires a procedure plan for each sObject and definition.	Small, 63.0	63.0
recordId	String	ID of the procedure plan definition record.	Small, 62.0	62.0
success	Boolean	Indicates whether the API request is successful (<code>true</code>) or not (<code>false</code>).	Small, 62.0	62.0

Procedure Plan Definition Version

Output representation of the version details of a procedure plan definition.

JSON example

```

"procedurePlanDefinitionVersions": [
  {
    "active": false,
    "developerName": "sample_test",

```

```

    "effectiveFrom": "2024-07-09T00:00:00.000Z",
    "contextDefinition": "SalesTransactionContext_stdctx",
    "procedurePlanSections": [],
    "rank": 1,
    "readContextMapping": "ProductDiscoveryContextMapping",
    "recordId": "1CvZ600000080IaKAM",
    "success": true,
    "processType": "Default"
  }
]

```

Property Name	Type	Description	Filter Group and Version	Available Version
active	Boolean	Indicates whether the procedure plan definition version is active (<code>true</code>) or not (<code>false</code>).	Small, 62.0	62.0
context Definition	String	Context definition that's associated with the procedure plan definition version.	Small, 62.0	62.0
developerName	String	Developer name of the procedure plan definition version.	Small, 62.0	62.0
effectiveFrom	String	Date and time from when the procedure plan definition version is effective.	Small, 62.0	62.0
effectiveTo	String	Date and time until when the procedure plan definition version is effective.	Small, 62.0	62.0
error	Procedure Plan Generic Error[]	Details of the error encountered during the processing of the API request.	Small, 62.0	62.0
inheritedFrom	String	Name of the template the procedure plan definition is extended from.	Small, 62.0	62.0
procedure PlanSections	Procedure Plan Section[]	List of sections of the procedure plan definition that you can organize in any order. Each section must include a procedure or a set of procedures to be executed for a specific criteria.	Small, 62.0	62.0
processType	String	Business processes that's specified that requires a procedure plan for each sObject and definition.	Small, 64.0	64.0
rank	Integer	Rank or the order of sequence to follow for the processing of the procedure plan definition version.	Small, 62.0	62.0
readContext Mapping	String	Mapping that's used to read data from the mapped object and populate the context definition.	Small, 62.0	62.0

Property Name	Type	Description	Filter Group and Version	Available Version
recordId	String	ID of the procedure plan definition version record.	Small, 62.0	62.0
saveContext Mapping	String	Mapping that's used to save data from the context definition and populate the mapped object.	Small, 62.0	62.0
success	Boolean	Indicates whether the API request is successful (<code>true</code>) or not (<code>false</code>).	Small, 62.0	62.0

Procedure Plan Definitions

Output representation of the details of procedure plan definitions.

JSON example

```
{
  "isSuccess": true,
  "procedurePlanDefinitions": [
    {
      "description": "test description",
      "developerName": "sample_test",
      "name": "sample_test",
      "primaryObject": "Account",
      "procedurePlanDefinitionVersions": [
        {
          "active": false,
          "developerName": "sample_test",
          "effectiveFrom": "2024-07-09T00:00:00.000Z",
          "contextDefinition": "SalesTransactionContext_stdctx",
          "procedurePlanSections": [],
          "rank": 1,
          "readContextMapping": "ProductDiscoveryContextMapping",
          "recordId": "1CvZ600000080IaKAM",
          "success": true
        }
      ],
      "recordId": "1FNZ60000004CAHOA2",
      "success": true
    },
    {
      "developerName": "PriceAdjustmentSchedule",
      "name": "PriceAdjustmentSchedule",
      "primaryObject": "PriceAdjustmentSchedule",
      "procedurePlanDefinitionVersions": [
        {
          "active": false,
          "developerName": "PriceAdjustmentSchedule",
          "effectiveFrom": "2024-07-10T00:00:00.000Z",
          "contextDefinition": "SalesTransactionContext_stdctx",
          "procedurePlanSections": [],

```



```

        "rank": 1,
        "recordId": "1CvZ6000000CaRbKAK",
        "success": true
      }
    ],
    "recordId": "1FNZ6000000CaSAOA0",
    "success": true
  }
]
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
error	Procedure Plan Generic Error[]	Details of the error encountered during the processing of the API request.	Small, 62.0	62.0
isSuccess	Boolean	Indicates whether the API request is successful (<code>true</code>) or not (<code>false</code>).	Small, 62.0	62.0
procedurePlanDefinitions	Procedure Plan Definition[]	Details of a single procedure plan definition.	Small, 62.0	62.0

Procedure Plan Generic

Output representation of the details of the created procedure plan definition record.

JSON example

This example shows a sample response of the details of a procedure plan definition record, created by using the Procedure Plan Definitions (POST) API.

```

{
  "isSuccess":true,
  "recordId":"1FNDU00000000EX4AY"
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
error	Procedure Plan Generic Error[]	Details of the error encountered during the processing of the API request.	Small, 62.0	62.0
isSuccess	Boolean	Indicates whether the API request is successful (<code>true</code>) or not (<code>false</code>).	Small, 62.0	62.0
recordId	String	ID of the created procedure plan definition record.	Small, 62.0	62.0

Procedure Plan Generic Error

Output representation of the error details related to the procedure plan definitions.

Property Name	Type	Description	Filter Group and Version	Available Version
errorCode	String	Code indicating the type of error.	Small, 62.0	62.0
message	String	Message stating the reason for the error, if any.	Small, 62.0	62.0

Procedure Plan Option

Output representation of the details of a procedure plan option.

JSON example

```

"procedurePlanOptions": [
  {
    "expressionSetApiName": "Revenue_Mgmt_Default_Pricing_Procedure",
    "expressionSetDefinition": "9QAZ60000004E00A2",
    "expressionSetLabel": "Revenue Management Default Pricing Procedure",

    "isSuccess": true,
    "logic": "1 AND 2 AND 3",
    "primaryObject": "Account",
    "priority": 1,
    "procedurePlanCriterion": [
      {
        "conditionSequence": 1,
        "dataType": "Text",
        "fieldObject": "BillingCountry",
        "fieldPath": "BillingCountry",
        "isSuccess": true,
        "literalValue": "test",
        "operator": "Equals",
        "recordId": "1FiZ60000004C9cKAE"
      },
      {
        "conditionSequence": 2,
        "dataType": "Text",
        "fieldObject": "BillingPostalCode",
        "fieldPath": "BillingPostalCode",
        "isSuccess": true,
        "literalValue": "pramit",
        "operator": "Equals",
        "recordId": "1FiZ60000004C9dKAE"
      },
      {
        "conditionSequence": 3,
        "dataType": "Date",
        "fieldObject": "LastActivityDate",
        "fieldPath": "LastActivityDate",
        "isSuccess": true,
        "literalValue": "2024-07-14",
        "operator": "LessThan",
        "recordId": "1FiZ60000004C9eKAE"
      }
    ]
  }
]

```

```

    }
  ],
  "recordId": "1FYZ6000000000fOAA",
  "saveContextMapping": "AssetToSalesTransactionMapping"
}
]

```

Property Name	Type	Description	Filter Group and Version	Available Version
error	Procedure Plan Generic Error[]	Details of the error encountered during the processing of the API request.	Small, 62.0	62.0
expressionSetApiName	String	API name of the expression set.	Small, 62.0	62.0
expressionSetDefinition	String	Expression set definition that's associated with this procedure plan option record.	Small, 62.0	62.0
expressionSetLabel	String	Label of the expression set that's associated with this procedure plan option record.	Small, 62.0	62.0
isSuccess	Boolean	Indicates whether the API request is successful (<code>true</code>) or not (<code>false</code>).	Small, 62.0	62.0
logic	String	Computation logic for the conditions applied to a procedure plan option.	Small, 62.0	62.0
primaryObject	String	Source object that's used to create a procedure with rule-based criteria.	Small, 62.0	62.0
priority	Integer	Priority for the specified criteria.	Small, 62.0	62.0
procedurePlanCriterion	Procedure Plan Criterion[]	Details of the rule-based criteria for the procedure.	Small, 62.0	62.0
readContextMapping	String	Mapping that's used to read from the mapped object and populate the context definition.	Small, 62.0	62.0
recordId	String	ID of the procedure plan option record.	Small, 62.0	62.0
saveContextMapping	String	Mapping that's used to save data from the context definition and populate the mapped object.	Small, 62.0	62.0

Procedure Plan Section

Output representation of the details of a procedure plan section.

JSON example

```

"procedurePlanSections": [
  {
    "isInherited": false,

```

```

"isSuccess": true,
"procedurePlanOptions": [
  {
    "expressionSetApiName": "Revenue_Mgmt_Default_Pricing_Procedure",
    "expressionSetDefinition": "9QAZ60000004E00A2",
    "expressionSetLabel": "Revenue Management Default Pricing Procedure",

    "isSuccess": true,
    "logic": "1 AND 2 AND 3",
    "primaryObject": "Account",
    "priority": 1,
    "procedurePlanCriterion": [
      {
        "conditionSequence": 1,
        "dataType": "Text",
        "fieldObject": "BillingCountry",
        "fieldPath": "BillingCountry",
        "isSuccess": true,
        "literalValue": "test",
        "operator": "Equals",
        "recordId": "1FiZ60000004C9cKAE"
      },
      {
        "conditionSequence": 2,
        "dataType": "Text",
        "fieldObject": "BillingPostalCode",
        "fieldPath": "BillingPostalCode",
        "isSuccess": true,
        "literalValue": "pramit",
        "operator": "Equals",
        "recordId": "1FiZ60000004C9dKAE"
      },
      {
        "conditionSequence": 3,
        "dataType": "Date",
        "fieldObject": "LastActivityDate",
        "fieldPath": "LastActivityDate",
        "isSuccess": true,
        "literalValue": "2024-07-14",
        "operator": "LessThan",
        "recordId": "1FiZ60000004C9eKAE"
      }
    ],
    "recordId": "1FYZ600000000fOAA",
    "saveContextMapping": "AssetToSalesTransactionMapping"
  },
  {
    "recordId": "1FRZ60000008OIAOA2",
    "resolutionType": "RuleBased",
    "sectionType": "PricingProcedure",
    "sequence": 1,
    "subSectionType": "PricingProcedure"
  }
]

```

Property Name	Type	Description	Filter Group and Version	Available Version
error	Procedure Plan Generic Error[]	Details of the error encountered during the processing of the API request.	Small, 62.0	62.0
isInherited	Boolean	Indicates whether the procedure plan section is inherited from a template (<code>true</code>) or not (<code>false</code>).	Small, 62.0	62.0
isSuccess	Boolean	Indicates whether the API request is successful (<code>true</code>) or not (<code>false</code>).	Small, 62.0	62.0
procedurePlanOptions	Procedure Plan Option[]	List of procedure plan options.	Small, 62.0	62.0
recordId	String	ID of the procedure plan option record.	Small, 62.0	62.0
resolutionType	String	Type of resolution that's used to filter the procedure.	Small, 62.0	62.0
sectionType	String	Type of section. Valid values are: <ul style="list-style-type: none"> • PricingProcedure • ProductDiscoveryProcedure • ProductQualificationProcedure • PricingDiscoveryProcedure • DiscountSpreadServiceProcedure • RatingProcedure • Custom • RatingDiscoveryProcedure 	Small, 62.0	62.0
sequence	Integer	Sequence that's followed for the processing of the procedures.	Small, 62.0	62.0
subSectionType	String	Subsection that's added to the procedure plan definition.	Small, 62.0	62.0

Procedure Plan Section Evaluation Runtime

Output representation of the results from the procedure plan evaluation.

JSON example

```

"procedurePlanSections": [
  {
    "expressionSetApiName": "pricingProcedure_usageType_3",
    "expressionSetDefinitionId": "9QAZ60000004Ef60AE",
    "expressionSetLabel": "pricingProcedure_usageType_3",
    "sectionType": "PricingProcedure",
    "sequence": 1,
    "subSectionType": "Section1",
  }
]

```

```

        "usageType": "DefaultPricing"
    },
    {
        "expressionSetApiName": "productQualification_usageType_3",
        "expressionSetDefinitionId": "9QAZ60000004EfFOAU",
        "expressionSetLabel": "productQualification_usageType_3",
        "sectionType": "ProductQualificationProcedure",
        "sequence": 3,
        "subSectionType": "Section2",
        "usageType": "ProductQualification"
    },
    {
        "expressionSetApiName": "rating_usageType_2",
        "expressionSetDefinitionId": "9QAZ60000004EfHOAU",
        "expressionSetLabel": "rating_usageType_2",
        "sectionType": "RatingProcedure",
        "sequence": 2,
        "subSectionType": "Section3",
        "usageType": "DefaultRating"
    }
]

```

Property Name	Type	Description	Filter Group and Version	Available Version
expressionSetApiName	String	API name of the expression set.	Small, 62.0	62.0
expressionSetDefinitionId	String	ID of the expression set definition.	Small, 62.0	62.0
expressionSetLabel	String	Label of the expression set.	Small, 62.0	62.0
readContextMapping	String	Mapping that's used to read data from the mapped object and populate the context definition.	Small, 62.0	62.0
saveContextMapping	String	Mapping that's used to save data from the context definition and populate the mapped object.	Small, 62.0	62.0
sectionType	String	Name of the evaluated section. Valid values are: <ul style="list-style-type: none"> PricingProcedure ProductDiscoveryProcedure ProductQualificationProcedure PricingDiscoveryProcedure DiscountSpreadServiceProcedure RatingProcedure Custom 	Small, 62.0	62.0

Property Name	Type	Description	Filter Group and Version	Available Version
		<ul style="list-style-type: none"> RatingDiscoveryProcedure 		
sequence	Integer	Sequence that's followed for the processing of the procedures.	Small, 62.0	62.0
subSection Type	String	Name of the evaluated subsection.	Small, 62.0	62.0
usageType	String	Usage type of the procedure.	Small, 62.0	62.0

Procedure Plan Evaluation

Output representation of the evaluation details of a procedure plan definition.

JSON example

```

"procedurePlanEvaluations": [
  {
    "errorMessage": "",
    "id": "a01DU000000BylcYAC",
    "isSuccess": true,
    "primaryObject": "SignallingCustomEvaluation__c",
    "result": {
      "contextDefinition": "110DU00000008Sw2AI",
      "procedurePlanSections": []
    }
  }
]

```

Property Name	Type	Description	Filter Group and Version	Available Version
errorMessage	String	Message indicating the error details, if any.	Small, 62.0	62.0
id	String	ID of the object used for evaluation.	Small, 62.0	62.0
isSuccess	Boolean	Indicates whether the API request is successful (<code>true</code>) or not (<code>false</code>).	Small, 62.0	62.0
primaryObject	String	Name of the object used for evaluation.	Small, 62.0	62.0
result	Procedure Plan Evaluation Result[]	Results from the procedure plan evaluation.	Small, 62.0	62.0

Procedure Plan Evaluation Response

Output representation of the evaluation details of a procedure plan definition.

JSON example

```
{
  "isSuccess":true,
  "procedurePlanEvaluations":[
    {
      "errorMessage":"",
      "id":"a01DU000000BylcYAC",
      "isSuccess":true,
      "primaryObject":"SignallingCustomEvaluation__c",
      "result":{
        "contextDefinition":"110DU00000008Sw2AI",
        "procedurePlanSections":[]
      }
    }
  ]
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
errorMessage	String	Message indicating the error details, if any.	Small, 62.0	62.0
isSuccess	Boolean	Indicates whether the API request is successful (<code>true</code>) or not (<code>false</code>).	Small, 62.0	62.0
procedurePlanDefinitionName	String	Name of the procedure plan definition.	Small, 62.0	62.0
procedurePlanEvaluations	Procedure Plan Evaluation []	Evaluation details of the procedure plan.	Small, 62.0	62.0

Procedure Plan Evaluation Result

Output representation of the evaluation result of a procedure plan definition.

JSON example

```
"result":{
  "contextDefinition":"110DU00000008Sw2AI",
  "procedurePlanSections":[]
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
contextDefinition	String	Context definition that's associated with the procedure plan evaluation.	Small, 62.0	62.0
procedurePlanSections	Procedure Plan Section Evaluation Runtime []	Results from the procedure plan evaluation.	Small, 62.0	62.0

Pricing Process Execution Details for Line Items

Output representation of the pricing process execution details for the line items along with the error details and response generation status.

JSON example

```
{
  "error": {},
  "isSuccess": true,
  "lineItemDetailsList": [
    {
      "lineItemId": "LineItem1",
      "status": "Success"
    },
    {
      "lineItemId": "LineItem2",
      "status": "Success"
    },
    {
      "lineItemId": "LineItem3",
      "status": "Failure"
    }
  ]
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
error	Pricing Error Response	Error encountered during the processing of the API request.	Small, 63.0	63.0
isSuccess	Boolean	Indicates whether the response was generated successfully (<code>true</code>) or not (<code>false</code>).	Small, 63.0	63.0
lineItemDetails List	Line Item Details Response []	List of the line items for which the pricing process is executed.	Small, 63.0	63.0

Line Item Details Response

Output representation of the pricing process execution details for the line items.

JSON example

```
{
  "lineItemDetailsList": [
    {
      "lineItemId": "LineItem1",
      "status": "Success"
    },
    {
      "lineItemId": "LineItem2",
```

```

    "status": "Success"
  },
  {
    "lineItemId": "LineItem3",
    "status": "Failure"
  }
]
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
lineItemId	String	ID of the line item that the pricing process is executed for.	Small, 63.0	63.0
status	String	Specifies whether the pricing process execution for the line item is successful or has failed. Valid values are: <ul style="list-style-type: none"> • Success • Failure 	Small, 63.0	63.0

Pricing Process Execution Response

Output representation of the details of a pricing process execution.

JSON example

```

{
  "error": {},
  "isSuccess": true,
  "pricingProcessExecutionList": [
    {
      "executionId": "12345",
      "executionType": "Pricing_Line",
      "executionTypeId": "111_LineItem1",
      "message": "The Pricing API execution was successful.",
      "status": "Success"
    },
    {
      "executionId": "12345",
      "executionType": "Api_Execution",
      "executionTypeId": "333",
      "status": "Partial_Success"
    },
    {
      "executionId": "12345",
      "executionType": "Discovery",
      "executionTypeId": "222",
      "status": "Success"
    },
    {

```

```

    "executionId": "12345",
    "executionType": "Pricing",
    "executionTypeId": "111",
    "status": "Failure"
  },
  {
    "executionId": "12345",
    "executionType": "Discovery_Line",
    "executionTypeId": "222_LineItem1",
    "status": "Partial_Success"
  },
  {
    "executionId": "12345",
    "executionType": "Pricing_Line",
    "executionTypeId": "111_LineItem2",
    "status": "Failure"
  }
]
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
error	Pricing Error Response	Error encountered during the processing of the API request.	Small, 63.0	63.0
isSuccess	Boolean	Indicates whether the response was generated successfully (<code>true</code>) or not (<code>false</code>).	Small, 63.0	63.0
pricingProcessExecutionList	Pricing Process Execution List []	List of the execution details of the pricing process.	Small, 63.0	63.0

Pricing Process Execution List

Output representation of the execution details for different types of the pricing processes.

JSON example

```

{
  "pricingProcessExecutionList": [
    {
      "executionId": "12345",
      "executionType": "Pricing_Line",
      "executionTypeId": "111_LineItem1",
      "message": "The Pricing API execution was successful.",
      "status": "Success"
    },
    {
      "executionId": "12345",
      "executionType": "Api_Execution",
      "executionTypeId": "333",
      "status": "Success"
    }
  ]
}

```

```

    },
    {
      "executionId": "12345",
      "executionType": "Discovery",
      "executionTypeId": "222",
      "status": "Success"
    },
    {
      "executionId": "12345",
      "executionType": "Pricing",
      "executionTypeId": "111",
      "status": "Failure"
    },
    {
      "executionId": "12345",
      "executionType": "Discovery_Line",
      "executionTypeId": "222_LineItem1",
      "status": "Success"
    },
    {
      "executionId": "12345",
      "executionType": "Pricing_Line",
      "executionTypeId": "111_LineItem2",
      "status": "Failure"
    }
  ]
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
executionId	String	Unique ID that's generated each time a pricing process is executed.	Small, 63.0	63.0
executionType	String	Type of the execution that's defined internally within the pricing API.	Small, 63.0	63.0
executionTypeId	String	Unique execution type ID that's generated internally for process executions, such as pricing or discovery procedures.	Small, 63.0	63.0
message	String	Message that's generated when a pricing process is executed.	Small, 63.0	63.0
status	String	Execution process status for a line item. Valid values are: <ul style="list-style-type: none"> Failure Partial_Success—Applies to Pricing and Discovery procedures when execution for some line items fails. Success 	Small, 63.0	63.0

Pricing Simulation Input Variables With Data

Output representation of the pricing simulation variables with data.

JSON example

```
{
  "error": "",
  "simulationInputJsonWithData": "{\"SalesTransaction\": [{\"PriceBooks\": \\\"01sxx0000005ptpAAA\\\", \"SalesTransactionItem\": [{\"LineItemQuantity\": 4, \"ProductSellingModel\": null, \"Product\": \\\"01txx0000006i2SAAQ\\\", \"LineItem\": \\\"0QLxx0000004C92GAE\\\"}, {\"LineItemQuantity\": 3, \"ProductSellingModel\": null, \"Product\": \\\"01txx0000006i2TAAQ\\\", \"LineItem\": \\\"0QLxx0000004C93GAE\\\"}]}]\",
  \"success\": true
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
error	String	Returns the cause of error, if any. For a successful request, this API returns an empty string.	Small, 64.0	64.0
simulationInputJsonWithData	String	Resultant simulation input variables with quote or order data such as ID, which was specified in the query parameters.	Small, 64.0	64.0
success	Boolean	Indicates whether the request was successful (<code>true</code>) or not (<code>false</code>).	Small, 64.0	64.0

Salesforce Pricing Apex Reference

Use built-in Apex classes and interfaces grouped by namespace.

[RevSignaling Namespace](#)

The RevSignaling Namespace includes properties and methods to extend the standard procedure plan implementation through custom logic. Using this extension support, you can tailor implementations to your unique requirements.

SEE ALSO:

[Apex Developer Guide: Getting Started with Apex](#)

RevSignaling Namespace

The RevSignaling Namespace includes properties and methods to extend the standard procedure plan implementation through custom logic. Using this extension support, you can tailor implementations to your unique requirements.

Usage

To use this namespace, enable the **Procedure Plan Orchestration for Pricing** toggle from the Revenue Settings page from Setup.

The `RevSignaling` namespace includes these classes.

[ProcedurePlan Class](#)

Represents the instance of the current pricing procedure plan that you're working on.

[SignalingApexProcessor Interface](#)

Defines the context-driven orchestration logic based on procedure plan instance and contextual instance.

[TransactionRequest Class](#)

Represents the transaction request to the signaling Apex processor.

[TransactionResponse Class](#)

Represents the transaction response from the signaling Apex processor.

[TransactionStatus Enum](#)

Specifies the status of the transaction request.

ProcedurePlan Class

Represents the instance of the current pricing procedure plan that you're working on.

Namespace

[RevSignaling](#) on page 521

[ProcedurePlan Properties](#)

Learn more about the properties that are available with the `ProcedurePlan` class.

ProcedurePlan Properties

Learn more about the properties that are available with the `ProcedurePlan` class.

The `ProcedurePlan` class includes these properties.

[prevStepOutput](#)

Output of the previous step that's executed and passed to the next step.

prevStepOutput

Output of the previous step that's executed and passed to the next step.

Signature

```
public Map<String,ANY> prevStepOutput {get; set;}
```

```
RevSignaling.ProcedurePlan, prevStepOutput
```

Property Value

Type: `Map<String,Object>`

SignalingApexProcessor Interface

Defines the context-driven orchestration logic based on procedure plan instance and contextual instance.

Namespace

[RevSignaling](#) on page 521

Usage

Here's a sample implementation of the SignalingApexProcessor interface.

```
public class SignalingApexProcessorImpl implements RevSignaling.SignalingApexProcessor {  
    public RevSignaling.TransactionResponse execute(RevSignaling.TransactionRequest request)  
    {  
        System.debug('Executing SampleValidClass...');  
        System.debug('Procedure Plan: ' + request.procedurePlanInstance);  
        System.debug('Context Instance: ' + request.ctxInstanceId);  
  
        // Add your logic here  
  
        // Return the response  
        RevSignaling.TransactionResponse response = new RevSignaling.TransactionResponse();  
  
        response.status = RevSignaling.TransactionStatus.SUCCESS;  
        response.message = 'Apex method was successfully executed!';  
        return response;  
    }  
}
```

Refer to [Customize Your Pricing Procedures With Apex Hooks](#) for additional samples that cover unique pricing scenarios by implementing this interface.

[SignalingApexProcessor Methods](#)

The SignalingApexProcessor method executes the specified transaction request, which returns the corresponding response.

[SignalingApexProcessor Example Implementation](#)

Refer to the example implementation of the SignalingApexProcessor interface to define a context-driven orchestration logic.

SignalingApexProcessor Methods

The SignalingApexProcessor method executes the specified transaction request, which returns the corresponding response.

The `SignalingApexProcessor` class includes these methods.

`execute(var1)`

Executes the parameter that's specified in the instance of a transaction request.

execute (var1)

Executes the parameter that's specified in the instance of a transaction request.

Signature

```
public RevSignaling.TransactionResponse execute(RevSignaling.TransactionRequest var1)
```

```
RevSignaling.SignalingApexProcessor, execute, [RevSignaling.TransactionRequest],
RevSignaling.TransactionResponse
```

Parameters

var1

Type: [RevSignaling.TransactionRequest](#) on page 524

Instance of the TransactionRequest class containing the execution parameter.

Return Value

Type: [RevSignaling.TransactionResponse](#) on page 526

Response from the orchestration.

SignalingApexProcessor Example Implementation

Refer to the example implementation of the SignalingApexProcessor interface to define a context-driven orchestration logic.

This is an example implementation of the `RevSignaling.SignalingApexProcessor` interface.

```
public class SignalingApexProcessorImpl implements RevSignaling.SignalingApexProcessor {
    public RevSignaling.TransactionResponse execute(RevSignaling.TransactionRequest request)
    {
        System.debug('Executing SampleValidClass...');
        System.debug('Procedure Plan: ' + request.procedurePlanInstance);
        System.debug('Context Instance: ' + request.ctxInstanceId);

        // Add your logic here

        // Return the response
        RevSignaling.TransactionResponse response = new RevSignaling.TransactionResponse();

        response.status = RevSignaling.TransactionStatus.SUCCESS;
        response.message = 'Apex method was successfully executed!';
        return response;
    }
}
```

TransactionRequest Class

Represents the transaction request to the signaling Apex processor.

Namespace

[RevSignaling](#) on page 521

[TransactionRequest Constructors](#)

Learn more about the available constructors with the TransactionRequest class.

[TransactionRequest Properties](#)

Learn more about the properties that are available with the TransactionRequest class.

TransactionRequest Constructors

Learn more about the available constructors with the TransactionRequest class.

The `TransactionRequest` class includes these constructors.

[TransactionRequest\(procedurePlanInstance, ctxInstanceId\)](#)

Creates an instance of the TransactionRequest class to specify the procedure plan and context instance ID.

TransactionRequest (procedurePlanInstance, ctxInstanceId)

Creates an instance of the TransactionRequest class to specify the procedure plan and context instance ID.

Signature

```
public TransactionRequest (RevSignaling.ProcedurePlan procedurePlan, String ctxInstanceId)
```

```
RevSignaling.TransactionRequest, newInstance, [RevSignaling.ProcedurePlan, String],  
RevSignaling.TransactionRequest
```

Parameters

procedurePlan

Type: [RevSignaling.ProcedurePlan](#) on page 522

Instance of the procedure plan.

ctxInstanceId

Type: String

ID of the context.

TransactionRequest Properties

Learn more about the properties that are available with the TransactionRequest class.

The `TransactionRequest` class includes these properties.

[ctxInstanceId](#)

Set the context ID.

[procedurePlanInstance](#)

Set the instance of the procedure plan.

ctxInstanceId

Set the context ID.

Signature

```
public String ctxInstanceId {get; set;}
```

```
RevSignaling.TransactionRequest, ctxInstanceId
```

Property Value

Type: String

procedurePlanInstance

Set the instance of the procedure plan.

Signature

```
public RevSignaling.ProcedurePlan procedurePlanInstance {get; set;}
```

```
RevSignaling.TransactionRequest, procedurePlanInstance
```

Property Value

Type: [RevSignaling.ProcedurePlan](#) on page 522

TransactionResponse Class

Represents the transaction response from the signaling Apex processor.

Namespace

[RevSignaling](#) on page 521

[TransactionResponse Properties](#)

Learn more about the properties that are available with the TransactionResponse class.

TransactionResponse Properties

Learn more about the properties that are available with the TransactionResponse class.

The `TransactionResponse` class includes these properties.

[message](#)

Get the message from the transaction response.

[status](#)

Get the status of the request from the transaction response.

message

Get the message from the transaction response.

Signature

```
public String message {get; set;}
```

```
RevSignaling.TransactionResponse, message
```

Property Value

Type: String

status

Get the status of the request from the transaction response.

Signature

```
public RevSignaling.TransactionStatus status {get; set;}
```

```
RevSignaling.TransactionResponse, status
```

Property Value

Type: [RevSignaling.TransactionStatus](#) on page 527

TransactionStatus Enum

Specifies the status of the transaction request.

Enum Values

The `RevSignaling.TransactionStatus` enum includes these values.

Value	Description
FAILED <pre>RevSignaling.TransactionStatus, FAILED</pre>	The transaction request has failed.
SUCCESS <pre>RevSignaling.TransactionStatus, SUCCESS</pre>	The transaction request was successful.

Salesforce Pricing Standard Invocable Actions

Learn more about the standard invocable actions available with Salesforce Pricing.

[Run Salesforce Headless Pricing Action](#)

Invoke the Pricing Connect API by providing the pricing data and details of a context, pricing procedure, and price waterfall.

[Run Salesforce Pricing Action](#)

Invoke the Pricing Connect API by providing the context, pricing procedure, and price waterfall details.

SEE ALSO:

[Actions Developer Guide: Overview](#)

[REST API Developer Guide: Invocable Actions Standard](#)

Run Salesforce Headless Pricing Action

Invoke the Pricing Connect API by providing the pricing data and details of a context, pricing procedure, and price waterfall.

This action is available in API version 60.0 and later.

Special Access Rules

The Run Salesforce Headless Pricing action is available in Enterprise, Unlimited, and Developer Editions where Salesforce Pricing is enabled.

Supported REST HTTP Methods

URI

`/services/data/v65.0/actions/standard/runSalesforceHeadlessPricing`

Formats

JSON, XML

HTTP Methods

POST

Authentication

Authorization: Bearer *token*

Inputs

Input	Details
contextDefinitionId	<p>Type string</p> <p>Description Required. ID of the context definition record that's used to build the pricing data.</p>
contextMappingId	<p>Type string</p>

Input	Details
	<p>Description</p> <p>Required.</p> <p>ID of the context-mapping record that identifies which Salesforce object and mappings to use to build the pricing data.</p>
discoveryProcedure	<p>Type</p> <p>string</p> <p>Description</p> <p>Name of the discovery procedure that's used to execute the discovery process.</p>
displayContext	<p>Type</p> <p>boolean</p> <p>Description</p> <p>Indicates whether to display the context structure for pricing (<code>true</code>) or not (<code>false</code>).</p>
effectiveDate	<p>Type</p> <p>string</p> <p>Description</p> <p>Date when the pricing rules, as specified in the pricing procedure, are applied.</p> <p>The <code>effectiveDate</code> parameter determines which pricing procedure to execute when multiple active versions of pricing procedures are available with different date ranges.</p>
isHighVolumeLineItems	<p>Type</p> <p>boolean</p> <p>Description</p> <p>Indicates whether the pricing API returns pricing details for more than 100 line items (<code>true</code>) or not (<code>false</code>).</p>
isSkipWaterfall	<p>Type</p> <p>boolean</p> <p>Description</p> <p>Indicates whether to generate the price waterfall data (<code>true</code>) or not (<code>false</code>).</p>
persistContext	<p>Type</p> <p>boolean</p> <p>Description</p> <p>Indicates whether to store the context (<code>true</code>) or not (<code>false</code>).</p>
pricingData	<p>Type</p> <p>string</p>

Input**Details**

Input	Details
	<p>Description</p> <p>Required.</p> <p>JSON data that's used to build the pricing data. The JSON must be escaped. If you're using this data within a Flow, then the JSON data must not be escaped.</p>
pricingProcedureId	<p>Type</p> <p>string</p> <p>Description</p> <p>Required.</p> <p>ID of the expression set definition record that's used to execute the pricing process.</p>
skipDiscovery	<p>Type</p> <p>boolean</p> <p>Description</p> <p>Indicates whether to skip executing the discovery procedure (<code>true</code>) or not (<code>false</code>).</p>
taggedData	<p>Type</p> <p>boolean</p> <p>Description</p> <p>Indicates whether the associated context node contains a key (<code>true</code>) or not (<code>false</code>).</p>
useSessionScopedContext	<p>Type</p> <p>boolean</p> <p>Description</p> <p>Indicates whether to store the context in a session (<code>true</code>) or a request (<code>false</code>).</p>

Outputs**Output****Details**

Output	Details
contextDetails	<p>Type</p> <p>string</p> <p>Description</p> <p>Context structure for pricing that's generated when the <code>displayContext</code> parameter is set to <code>true</code>.</p>
executionId	<p>Type</p> <p>string</p>

This sample response is for the Run Salesforce Headless Pricing action.

```
{
  "actionName": "runSalesforceHeadlessPricing",
  "errors": null,
  "isSuccess": true,
  "outputValues": {
    "contextDetails": {
      "SalesTransaction": [
        {
          "PriceBooks": "01sxx0000005q3VAAQ",
          "Subtotal": 587.2095,
          "PriceAdjustmentSchedule": "84Xxx0000004CMxEAM",
          "EffectiveDate": "2024-02-12T00:00:00.000Z",
          "SalesTransactionItem": [
            {
              "LineItemQuantity": 5,
              "ProductSellingModel": "0jPxx000000009hEAA",
              "DerivedPricingAttribute": false,
              "Product": "01txx0000006iLwAAI",
              "LineItem": "LineItem1",
              "NetUnitPrice": 117.4419,
              "SalesTrxnAdjustmentGroup": [
                {
                  "AdjustmentType": "Percentage",
                  "AdjustmentValue": 10
                }
              ]
            }
          ]
        }
      ]
    },
    "executionId": "1708488641379821",
    "pricingProcessStatus": "Completed",
    "pricingResult": {
      "StartDate": [
        {
          "value": 1700137200000,
          "dataPath": [
            "CTX_ece1667e-7a09-40ab-9718-23bdc179a0a5",
            "CTX_d3b9ffd5-2be7-4366-92d8-c2bcf03b69ed"
          ],
          "errors": [],
          "isSuccess": true
        }
      ],
      "NetUnitPrice": [
        {
          "value": 115,
          "dataPath": [
            "CTX_ece1667e-7a09-40ab-9718-23bdc179a0a5",
            "CTX_d3b9ffd5-2be7-4366-92d8-c2bcf03b69ed"
          ],
          "errors": [],

```



```

    "isSuccess": true
  }
],
"ProductSellingModel": [
  {
    "value": "0jPDE000000042K2AQ",
    "dataPath": [
      "CTX_ece1667e-7a09-40ab-9718-23bdc179a0a5",
      "CTX_d3b9ffd5-2be7-4366-92d8-c2bcf03b69ed"
    ],
    "errors": [],
    "isSuccess": true
  }
],
"Pricebook": [
  {
    "value": "01sDE0000000LoeYAE",
    "dataPath": [
      "CTX_ece1667e-7a09-40ab-9718-23bdc179a0a5"
    ],
    "errors": [],
    "isSuccess": true
  }
],
"NetTotalPrice": [
  {
    "value": 1150,
    "dataPath": [
      "CTX_ece1667e-7a09-40ab-9718-23bdc179a0a5",
      "CTX_d3b9ffd5-2be7-4366-92d8-c2bcf03b69ed"
    ],
    "errors": [],
    "isSuccess": true
  }
],
"Subtotal": [
  {
    "value": 1150,
    "dataPath": [
      "CTX_ece1667e-7a09-40ab-9718-23bdc179a0a5"
    ],
    "errors": [],
    "isSuccess": true
  }
],
"Quantity": [
  {
    "value": 10,
    "dataPath": [
      "CTX_ece1667e-7a09-40ab-9718-23bdc179a0a5",
      "CTX_d3b9ffd5-2be7-4366-92d8-c2bcf03b69ed"
    ],
    "errors": [],
    "isSuccess": true
  }
]

```

```

    }
  ],
  "Product": [
    {
      "value": "01tDE000000FU99YAG",
      "dataPath": [
        "CTX_ece1667e-7a09-40ab-9718-23bdc179a0a5",
        "CTX_d3b9ffd5-2be7-4366-92d8-c2bcf03b69ed"
      ],
      "errors": [],
      "isSuccess": true
    }
  ],
  "CurrencyIsoCode": [
    {
      "value": "USD",
      "dataPath": [
        "CTX_ece1667e-7a09-40ab-9718-23bdc179a0a5"
      ],
      "errors": [],
      "isSuccess": true
    }
  ]
}
  ],
  "version": 1
}

```

SEE ALSO:

[Salesforce Help: Invoke Salesforce Headless Pricing in a Flow](#)

Run Salesforce Pricing Action

Invoke the Pricing Connect API by providing the context, pricing procedure, and price waterfall details.

This action is available in API version 60.0 and later. You can use this action with Flows only. To use this action with an API tool such as Postman, see [Run Salesforce Headless Pricing Action](#).

Special Access Rules

The Run Salesforce Pricing action is available in Developer, Enterprise, and Unlimited Editions where Salesforce Pricing is enabled.

Supported REST HTTP Methods

URI

`/services/data/v65.0/actions/standard/runSalesforcePricing`

Formats

JSON, XML

HTTP Methods

POST

Authentication

Authorization: Bearer *token*

Inputs

Input	Details
contextInstanceId	<p>Type string</p> <p>Description Required. ID of the context data that's used to build the pricing procedure. Get the context instance ID by invoking the Context Service API. See Context Service (POST).</p>
discoveryProcedure	<p>Type string</p> <p>Description Name of the discovery procedure that's used to execute the discovery process of the pricing data.</p>
effectiveDate	<p>Type string</p> <p>Description Date when the pricing rules, as specified in the pricing procedure, are applied. The <code>effectiveDate</code> parameter determines which pricing procedure to execute when multiple active versions of pricing procedures are available with different date ranges.</p>
isDeveloperName	<p>Type boolean</p> <p>Description Indicates whether the input value in a procedure must use the API name of the pricing (<code>true</code>) or the field name (<code>false</code>).</p>
isSkipWaterfall	<p>Type boolean</p> <p>Description Indicates whether the price waterfall data must be generated (<code>true</code>) or not (<code>false</code>).</p>
pricingProcedureName	<p>Type string</p> <p>Description Required.</p>

Input	Details
	Name of the pricing procedure record that's used to execute the pricing process.
skipDiscovery	<p>Type boolean</p> <p>Description Indicates whether to skip executing the discovery procedure (<code>true</code>) or not (<code>false</code>).</p>

Outputs

Output	Details
executionId	<p>Type string</p> <p>Description ID of the executed pricing data.</p>

Example

POST

This sample request is for the Run Salesforce Pricing action.

```
{
  "inputs": [
    {
      "contextInstanceId": "32f2c894-ba5e-41c0-91e4-2ab5826f579b",
      "pricingProcedureName": "PricingAction",
      "isSkipWaterfall": false,
      "skipDiscovery": false,
      "isDeveloperName": true,
      "effectiveDate": "2023-11-16T12:20:00.000Z",
      "discoveryProcedure": "ES1"
    }
  ]
}
```

This sample response is for the Run Salesforce Pricing action.

```
{
  "actionName": "runSalesforcePricing",
  "errors": null,
  "isSuccess": true,
  "outputValues": {
    "executionId": "2QTurzG2NRQ5bgrjvvqyh"
  },
}
```

```

"version": 1
}

```

SEE ALSO:

[Salesforce Help: Invoke Salesforce Pricing in a Flow](#)

Salesforce Pricing Metadata API Types

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

[Flow for Salesforce Pricing](#)

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.

[IndustriesPricingSettings](#)

Represents the settings for Salesforce Pricing.

[PricingActionParameters](#)

Represents the pricing action that's associated with a context definition and pricing procedure.

[PricingRecipe](#)

Represents the data models or sets of objects of a particular cloud that the pricing data store consumes during design time and run time.

[ProcedureOutputResolution](#)

Represents the pricing resolution for a pricing element determined by using strategy name and formula.

SEE ALSO:

[Metadata API Developer Guide: Understanding Metadata API](#)

Flow for Salesforce Pricing

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

FlowActionCall

Salesforce Pricing exposes additional actionType values for the FlowActionCall Metadata type.

Field Name	Field Type	Description
actionType	InvokableActionType (enumeration of type string)	Required. The action type. Additional valid values only for Salesforce Pricing include:

Field Name	Field Type	Description
		<ul style="list-style-type: none"> <code>runSalesforcePricing</code>—Invoke the Pricing Connect API by providing the context, pricing procedure, and price waterfall details. <code>runSalesforceHeadlessPricing</code>—Invoke the Pricing Connect API by providing the pricing data and details of a context, pricing procedure, and price waterfall.

IndustriesPricingSettings

Represents the settings for Salesforce Pricing.

Parent Type and Manifest Access

This type extends the [Metadata](#) metadata type and inherits its `fullName` field.

In the package manifest, all the settings metadata types for the org are accessed using the “Settings” name. See [Settings](#) for more details.

File Suffix and Directory Location

`IndustriesPricingSettings` values are stored in the `IndustriesPricingSettings.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

`IndustriesPricingSettings` components are available in API version 60.0 and later.

Special Access Rules

This metadata type is available with Salesforce Pricing.

Fields

Field Name	Description
<code>enableDebugPriceLogs</code>	<p>Field Type boolean</p> <p>Description Indicates whether to use price logs to diagnose and resolve pricing issues (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>. Available in API version 63.0 and later.</p>
<code>enableHighAvailability</code>	<p>Field Type boolean</p>

Field Name	Description
	<p>Description Reserved for internal use.</p>
enableHighestPriceCompliance	<p>Field Type boolean</p> <p>Description Indicates whether to track the maximum price of a product over a period of 30 days (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>. Available in API version 64.0 and later.</p>
enableLowestPriceCompliance	<p>Field Type boolean</p> <p>Description Indicates whether to track the minimum price of a product over a period of 30 days (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>. Available in API version 62.0 and later.</p>
enablePricingProcParallelization	<p>Field Type boolean</p> <p>Description Indicates whether to run pricing elements in parallel within a pricing procedure to optimize the performance of the pricing execution process (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>. Available in API version 64.0 and later.</p>
enablePricingWaterfall	<p>Field Type boolean</p> <p>Description Indicates whether to enable Price Waterfall (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>. Price Waterfall provides insights that include price breakups and reasons for every step of the pricing process.</p>
enablePricingWaterfallPersistence	<p>Field Type boolean</p> <p>Description Indicates whether to enable Price Waterfall Persistence (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>. Price Waterfall Persistence stores the process logs that provide insights into the internal pricing processes.</p>
enableSalesforcePricing	<p>Field Type boolean</p> <p>Description Indicates whether to enable Salesforce Pricing (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>

Declarative Metadata Sample Definition

This example shows a sample `IndustriesPricingSettings` component.

```
<IndustriesPricingSettings xmlns="http://soap.sforce.com/2006/04/metadata">
  <enableDebugPriceLogs>true</enableDebugPriceLogs>
  <enableHighAvailability>true</enableHighAvailability>
  <enableHighestPriceCompliance>true</enableHighestPriceCompliance>
  <enableLowestPriceCompliance>true</enableLowestPriceCompliance>
  <enablePricingProcParallelization>true</enablePricingProcParallelization>
  <enablePricingWaterfall>true</enablePricingWaterfall>
  <enablePricingWaterfallPersistence>true</enablePricingWaterfallPersistence>
  <enableSalesforcePricing>true</enableSalesforcePricing>
</IndustriesPricingSettings>
```

This example shows a sample `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>IndustriesPricing</members>
    <name>Settings</name>
  </types>
  <version>65.0</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](#).

PricingActionParameters

Represents the pricing action that's associated with a context definition and pricing procedure.

 **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

`PricingActionParameters` components have the suffix `.pricingActionParameters` and are stored in the `pricingActionParameters` folder.

Version

`PricingActionParameters` components are available in API version 60.0 and later.

Special Access Rules

This metadata type is available with Salesforce Pricing.

Fields

Field Name	Description
contextDefinition	<p>Field Type string</p> <p>Description Required. Context definition record that's associated with the pricing action.</p>
contextMapping	<p>Field Type string</p> <p>Description Required. Context mapping record that's associated with the pricing action.</p>
developerName	<p>Field Type string</p> <p>Description Required. Unique name of the pricing action parameter record. The name must begin with a letter and use only alphanumeric characters and underscores. The name must not include spaces, end with an underscore, or have two consecutive underscores.</p>
effectiveFrom	<p>Field Type dateTime</p> <p>Description Required. Date and time from when the pricing action becomes effective.</p>
effectiveTo	<p>Field Type dateTime</p> <p>Description Date and time till when the pricing action is in effect.</p>
masterLabel	<p>Field Type string</p>

Field Name	Description
	<p>Description</p> <p>Required.</p> <p>Master label of the pricing action parameter.</p>
objectName	<p>Field Type</p> <p>string</p> <p>Description</p> <p>Name of the object that's associated with the pricing action. Valid values are:</p> <ul style="list-style-type: none"> • Case • Contract • Opportunity • Order • Quote • SalesAgreement • WorkOrder
pricingProcedure	<p>Field Type</p> <p>string</p> <p>Description</p> <p>Pricing procedure record that's associated with this pricing action.</p>

Declarative Metadata Sample Definition

The following is an example of a PricingActionParameters component.

```
<PricingActionParameters xmlns="http://soap.sforce.com/2006/04/metadata">
  <developerName>CMEDefaultActionParameters</developerName>
  <objectName>ORDER</objectName>
  <pricingProcedure>PP</pricingProcedure>
  <effectiveFrom>2024-04-08T07:32:00.000Z</effectiveFrom>
  <effectiveTo>2024-04-11T07:32:00.000Z</effectiveTo>
  <contextDefinition>SalesTransactionContext__stdctx</contextDefinition>
  <contextMapping>SalesAgreementEntitiesMapping</contextMapping>
  <masterLabel>PAP_test</masterLabel>
</PricingActionParameters>
```

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>PricingActionParameters</name>
  </types>
```

```
<version>65.0</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](#).

PricingRecipe

Represents the data models or sets of objects of a particular cloud that the pricing data store consumes during design time and run time.

Parent Type

This type extends the [Metadata](#) metadata type and inherits its `fullName` field.

File Suffix and Directory Location

PricingRecipe components have the suffix `.pricingRecipe` and are stored in the `pricingRecipe` folder.

Version

PricingRecipe components are available in API version 60.0 and later.

Special Access Rules

This metadata type is available with Salesforce Pricing.

Fields

Field Name	Description
<code>defaultPricingProcedure</code>	<p>Field Type ExpressionSetDefinition</p> <p>Description Expression set definition that's associated with this pricing recipe setting.</p>
<code>defaultPricingProcedureDeveloperName</code>	<p>Field Type string</p> <p>Description For internal use only.</p>
<code>defaultPricingProcedureId</code>	<p>Field Type string</p>

Field Name	Description
	<p>Description ID of the pricing procedure of the pricing recipe.</p>
developerName	<p>Field Type string</p> <p>Description Required. API name of the pricing recipe.</p>
isActive	<p>Field Type boolean</p> <p>Description Indicates whether the pricing recipe is active (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code></p>
isInternal	<p>Field Type boolean</p> <p>Description Indicates whether the price recipe record is created internally by the Salesforce platform (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code></p>
masterLabel	<p>Field Type string</p> <p>Description Required. Name for pricing recipe that's defined when the pricing recipe is created.</p>
pricingRecipeTableMapping	<p>Field Type PricingRecipeTableMapping[]</p> <p>Description Mapping of the pricing components of a lookup table with the chosen pricing recipe.</p>

PricingRecipeTableMapping

Represents the mapping of the lookup table with the chosen pricing recipe.

Field Name	Description
isInternal	<p>Field Type boolean</p>

Field Name	Description
	<p>Description</p> <p>Indicates whether the price recipe field mapping record is created internally by the Salesforce platform (<code>true</code>) or not (<code>false</code>).</p> <p>The default value is <code>false</code>.</p>
<code>lookupTable</code>	<p>Field Type</p> <p>DecisionTable</p> <p>DecisionMatrixDefinition</p> <p>Description</p> <p>Lookup table that's associated with either a decision matrix or decision table.</p>
<code>lookupTableDeveloperName</code>	<p>Field Type</p> <p>string</p> <p>Description</p> <p>For internal use only.</p>
<code>pricingComponentType</code>	<p>Field Type</p> <p>string</p> <p>Description</p> <p>Pricing component field data that the decision table is built on.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • <code>AttributeDiscount</code> • <code>BundleDiscount</code> • <code>DerivedPricing</code> • <code>ListPrice</code> • <code>PriceAdjustmentMatrix</code> • <code>PromotionsDiscount</code> • <code>VolumeDiscount</code> • <code>VolumeTierDiscount</code> • <code>DiscountDistributionService</code>. This value is available in API version 60.0 and later. • <code>MinimumPrice</code>. Available in API version 62.0 and later.
<code>pricingProcedureOutputMapList</code>	<p>Field Type</p> <p>PricingProcedureOutputMap[]</p> <p>Description</p> <p>List of the mappings of the outputs of the pricing procedures to the associated lookup tables. Available in API version 60.0 and later.</p>
<code>pricingRecipe</code>	<p>Field Type</p> <p>string</p>

Field Name	Description
	<p>Description</p> <p>Required.</p> <p>Pricing data store that's associated with this pricing recipe field mapping.</p>

PricingProcedureOutputMap

Represents the mapping of the outputs of the pricing procedures to the associated lookup tables. Each record specifies the output mapping of the associated lookup table based on the pricing component type specified in the PricingRecipeTableMapping object.

Field Name	Description
fieldName	<p>Field Type</p> <p>string</p> <p>Description</p> <p>For internal use only.</p>
isPricingRecipeActive	<p>Field Type</p> <p>boolean</p> <p>Description</p> <p>Indicates whether the associated pricing recipe is active (<code>true</code>) or not (<code>false</code>).</p> <p>The default value is <code>false</code>.</p>
outputFieldName	<p>Field Type</p> <p>string</p> <p>Description</p> <p>Field name that contains the output type that's generated from the pricing element.</p>
outputFieldNameString	<p>Field Type</p> <p>string</p> <p>Description</p> <p>Derived field that references a specific column in a decision table or decision matrix.</p>
outputType	<p>Field Type</p> <p>string</p> <p>Description</p> <p>Output type that's generated from a pricing element.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • AdjustmentType • AdjustmentValue • CustomOutput • HashOutput

Field Name	Description
	<ul style="list-style-type: none"> UnitPrice
pricingElementType	<p>Field Type PricingElementType (enumeration of type string)</p> <p>Description Type of pricing element, which is a derived field from PricingRecipeTableMapping.PricingComponentType.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> AssetDiscovery AttributeDiscount BundleDiscount DerivedPricing DiscountDistributionService ListPrice MinimumPrice PriceAdjustmentMatrix PriceRevision PromotionsDiscount RuleFetch VolumeDiscount VolumeTierDiscount

Declarative Metadata Sample Definition

The following is an example of a PricingRecipe component.

```
<PricingRecipe xmlns="http://soap.sforce.com/2006/04/metadata">
  <defaultPricingProcedureId> </defaultPricingProcedureId>
  <developerName>CMEDefaultRecipe</developerName>
  <isActive>>false</isActive>
  <isInternal>>false</isInternal>
  <masterLabel>CMEDefaultRecipe</masterLabel>
  <pricingRecipeTableMapping>
    <isInternal>>false</isInternal>

<lookupTableDeveloperName>Bundle_Based_Adjustment_Decision_Table</lookupTableDeveloperName>

  <pricingComponentType>CUSTOMDISCOUNT</pricingComponentType>
  <fileBasedDecisionTableName>Bundle Based Adjustment
Entries</fileBasedDecisionTableName>
  <pricingProcedureOutputMapList>
    <fieldName>AdjustmentValue</fieldName>
    <isPricingRecipeActive>>false</isPricingRecipeActive>
    <outputFieldName>01Pxx000000000f</outputFieldName>
```

```

        <outputFieldNameString>>false</outputFieldNameString>
        <outputType>AdjustmentValue</outputType>
    <pricingElementType>BundleDiscount</pricingElementType>
    </pricingProcedureOutputMapList>
    <pricingProcedureOutputMapList>
        <fieldName>AdjustmentType</fieldName>
        <isPricingRecipeActive>>false</isPricingRecipeActive>
        <outputFieldName>01Pxx000000000m</outputFieldName>
        <outputFieldNameString>>false</outputFieldNameString>
        <outputType>AdjustmentType</outputType>
    <pricingElementType>BundleDiscount</pricingElementType>
    </pricingProcedureOutputMapList>
    <pricingRecipe>CMEDefaultRecipe</pricingRecipe>
</pricingRecipeTableMapping>
</PricingRecipe>

```

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>PricingRecipe</name>
    </types>
    <version>65.0</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](#).

ProcedureOutputResolution

Represents the pricing resolution for a pricing element determined by using strategy name and formula.

Parent Type

This type extends the [Metadata](#) metadata type and inherits its `fullName` field.

File Suffix and Directory Location

`ProcedureOutputResolution` components have the suffix `.procedureOutputResolution` and are stored in the `procedureOutputResolution` folder.

Version

`ProcedureOutputResolution` components are available in API version 63.0 and later.

Special Access Rules

This metadata type is available with Salesforce Pricing.

Fields

Field Name	Description
<code>developerName</code>	<p>Field Type string</p> <p>Description Required. API name of the procedure output resolution.</p>
<code>formula</code>	<p>Field Type string</p> <p>Description Required. Stores the encoded formula as text.</p>
<code>isActive</code>	<p>Field Type boolean</p> <p>Description Required. Indicates whether the strategy is active (<code>true</code>) or not (<code>false</code>).</p>
<code>isInternal</code>	<p>Field Type boolean</p> <p>Description Reserved for internal use.</p>
<code>masterLabel</code>	<p>Field Type string</p> <p>Description Required. A user-friendly name for the procedure output resolution, which is defined when the ProcedureOutputResolution record is created.</p>
<code>pricingElement</code>	<p>Field Type string</p> <p>Description Required.</p>

Field Name**Description**

Pricing element on which the procedure output resolution is defined.

Declarative Metadata Sample Definition

Here's an example of a ProcedureOutputResolution component.

```
<?xml version="1.0" encoding="UTF-8"?>
<ProcedureOutputResolution xmlns="http://soap.sforce.com/2006/04/metadata">
  <developerName>ProcedureOutputResolution</developerName>
  <isActive>false</isActive>
  <isInternal>false</isInternal>
  <masterLabel>Procedure Output Resolution</masterLabel>
  <pricingElement>ListPrice</pricingElement>
  <formula>MAX(ListPrice)</formula>
</ProcedureOutputResolution>
```

Here's 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>ProcedureOutputResolution</name>
  </types>
  <version>65.0</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](#).

Salesforce Pricing 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.

[PricingActionParameters](#)

Represents a pricing action associated to a context definition and a pricing procedure. This object is available in API version 60.0 and later.

[PricingProcedureOutputMap](#)

Represents the mapping of the outputs of the pricing procedures to the associated lookup tables. Each record specifies the output mapping of the associated lookup table based on the pricing component type specified in the Pricing Recipe Table Mapping object. This object is available in API version 60.0 and later.

[PricingRecipe](#)

Represents one out of various data models or sets of entities of a particular cloud that'll be consumed by the pricing data store during design and run time. This object is available in API version 60.0 and later.

[PricingRecipeTableMapping](#)

Represents the mapping of pricing components of a lookup table with the chosen pricing recipe. This object is available in API version 60.0 and later.

[ProcedureOutputResolution](#)

Represents the pricing resolution for an pricing element determined using strategy name and formula. This object is available in API version 63.0 and later.

[ProcedurePlanCriterion](#)

Represents a criterion within a procedure plan option record. This object is available in API version 62.0 and later.

[ProcedurePlanDefinition](#)

Represents the setup of a unified procedure from a list of multiple procedures that can be sequenced in any order based on business needs. Each procedure plan definition contains sections and subsections where procedures can be configured by using a lookup table or rule-based criteria. This object is available in API version 62.0 and later.

[ProcedurePlanDefinitionVersion](#)

Represents the versions for a procedure plan definition. Multiple versions under a procedure plan definition must be active at a time, which can be resolved at run time using the rank field. This object is available in API version 62.0 and later.

[ProcedurePlanOption](#)

Represents the selection criteria of how a procedure can be configured for a selected procedure plan section record. This object is available in API version 62.0 and later.

[ProcedurePlanSection](#)

Represents various procedure setup sections for a procedure plan definition. Each section enables the setup of a procedure of a type that can be further determined by using a rule-based criteria or it can be set based on a selected lookup table. This object is available in API version 62.0 and later.

[ProcedurePlanVariable](#)

Represents the setup for any adhoc user-defined variable that can be linked to a procedure plan definition record. This object is available in API version 62.0 and later.

SEE ALSO:

[Tooling API Developer Guide: Introducing Tooling API](#)

PricingActionParameters

Represents a pricing action associated to a context definition and a pricing procedure. This object is available in API version 60.0 and later.

Supported Calls

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

Fields

Field	Details
ContextDefinition	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The context definition record associated with the pricing action.</p>
ContextMapping	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The context mapping record that's associated with the pricing action.</p>
DeveloperName	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The unique name of the pricing action parameter record. This name must begin with a letter and use only alphanumeric characters and underscores. It can't include spaces, end with an underscore, or have two consecutive underscores.</p>
EffectiveFrom	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The date and time when the pricing action comes into effect.</p>
EffectiveTo	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time till when the pricing action is in effect.</p>
Language	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The language of the pricing action parameter.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • da—Danish • de—German • en_US—English • es—Spanish • es_MX—Spanish (Mexico) • fi—Finnish • fr—French • it—Italian • ja—Japanese • ko—Korean • nl_NL—Dutch • no—Norwegian • pt_BR—Portuguese (Brazil) • ru—Russian • sv—Swedish • th—Thai • zh_CN—Chinese (Simplified) • zh_TW—Chinese (Traditional)
MasterLabel	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The master label of the pricing action parameter.</p>
NamespacePrefix	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>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.</p>

Field	Details
	<p>The namespace prefix can have one of the following values.</p> <ul style="list-style-type: none"> 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.
ObjectName	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies the object associated to the pricing action. Possible values are:</p> <ul style="list-style-type: none"> Case Contract Opportunity Order Quote SalesAgreement WorkOrder
PricingProcedure	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The pricing procedure record associated with this pricing action.</p>

PricingProcedureOutputMap

Represents the mapping of the outputs of the pricing procedures to the associated lookup tables. Each record specifies the output mapping of the associated lookup table based on the pricing component type specified in the Pricing Recipe Table Mapping object. This object is available in API version 60.0 and later.

Supported Calls

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

Fields

Field	Details
IsPricingRecipeActive	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates if the pricing recipe is active (true) or not (false). The default value is <code>false</code>.</p>
LookupField	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Definition of the fields that are used for this lookup.</p>
OutputFieldNameId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The field name containing the output type generated from the pricing element. This field is a polymorphic relationship field.</p> <p>Relationship Name OutputFieldName</p> <p>Relationship Type Lookup</p> <p>Refers To CalculationMatrixColumn, DecisionTableParameter</p>
OutputFieldNameString	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description This is a derived field that references a specific column in a decision table or decision matrix.</p>
OutputType	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The output type generated from a pricing element. Possible values are:</p> <ul style="list-style-type: none"> • AdjustmentType—Adjustment Type • AdjustmentValue—Adjustment Value • CustomOutput—Custom Output • HashOutput—Hash Output • UnitPrice—Unit Price • UpperBound—Unit Price • LowerBound—Unit Price • TierValue—Unit Price • TierType—Unit Price
PricingComponentType	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description The pricing component field data on which the decision table is built. Possible values are:</p> <ul style="list-style-type: none"> • AttributeDiscount—Attribute Based Discount • BundleDiscount—Bundle Based Discount • DerivedPricing • DiscountDistributionService—Discount Distribution Service • ListPrice—List Price • PriceAdjustmentMatrix • PromotionsDiscount • VolumeDiscount—Volume Based Discount • VolumeTierDiscount—Tier Discount • RuleFetch • AssetDiscovery
PricingRecipeTableMappingId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description The mapping of pricing components of a lookup table with the chosen pricing recipe. This field is a relationship field.</p> <p>Relationship Name PricingRecipeTableMapping</p> <p>Relationship Type Lookup</p> <p>Refers To PricingRecipeTableMapping</p>

PricingRecipe

Represents one out of various data models or sets of entities of a particular cloud that'll be consumed by the pricing data store during design and run time. This object is available in API version 60.0 and later.

Supported Calls

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

Special Access Rules

Fields

Field	Details
<code>BusinessVertical</code>	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The business vertical associated with the procedure output resolution record. Possible values are:</p> <ul style="list-style-type: none"> • RLM
<code>DefaultPricingProcedureId</code>	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The expression set definition or Salesforce flow definition associated with this pricing recipe settings. This field is a relationship field.</p> <p>Relationship Name DefaultPricingProcedure</p> <p>Relationship Type Lookup</p> <p>Refers To ExpressionSetDefinition</p>
DeveloperName	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The developer name of the pricing recipe.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the pricing recipe is active (true) or not (false). The default value is <code>false</code>.</p>
IsInternal	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates if the price recipe record is created internally by the Salesforce platform (true) or not (false). The default value is <code>false</code>.</p>
Language	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The languages in which pricing recipe is supported.</p>

Field	Details
	<p>Possible values are:</p> <ul style="list-style-type: none"> • da—Danish • de—German • en_US—English • es—Spanish • es_MX—Spanish (Mexico) • fi—Finnish • fr—French • it—Italian • ja—Japanese • ko—Korean • nl_NL—Dutch • no—Norwegian • pt_BR—Portuguese (Brazil) • ru—Russian • sv—Swedish • th—Thai • zh_CN—Chinese (Simplified) • zh_TW—Chinese (Traditional)
MasterLabel	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description A user-friendly name for pricing recipe, which is defined when the pricing recipe is created.</p>
NamespacePrefix	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>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.</p> <p>The namespace prefix can have one of the following values.</p> <ul style="list-style-type: none"> • 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

Field	Details
	<p>installed managed package. This field's value is the namespace prefix of the Developer Edition organization of the package developer.</p> <ul style="list-style-type: none"> 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.

PricingRecipeTableMapping

Represents the mapping of pricing components of a lookup table with the chosen pricing recipe. This object is available in API version 60.0 and later.

Supported Calls

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

Fields

Field	Details
<code>FileBasedDecisionTableName</code>	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Name of the file-based decision table.</p>
<code>IsInternal</code>	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates if the price recipe field mapping record is created internally by the Salesforce platform (true) or not (false). The default value is <code>false</code>.</p>
<code>LookupTableId</code>	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The lookup table associated with the mapped fields. This field is a polymorphic relationship field.</p>

Field	Details
	<p>Relationship Name LookupTable</p> <p>Relationship Type Lookup</p> <p>Refers To DecisionMatrixDefinition, DecisionTable</p>
PricingComponentType	<p>Type Pricing Element Type enumerated list</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The pricing component field data on which the decision table is built. Possible values are:</p> <ul style="list-style-type: none"> • AttributeDiscount—Attribute Based Discount • BundleDiscount—Bundle Based Discount • DerivedPricing • ListPrice—List Price • PriceAdjustmentMatrix • PromotionsDiscount • VolumeDiscount—Volume Based Discount • VolumeTierDiscount—Tier Discount • DiscountDistributionService. This value is available in API version 60.0 and later. • MinimumPrice. This value is available in API version 62.0 and later. • RuleFetch. This value is available in API version 64.0 and later. • AssetDiscovery. This value is available in API version 64.0 and later.
PricingRecipeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The pricing data store associated with this pricing recipe field mappings. This field is a relationship field.</p> <p>Relationship Name PricingRecipe</p> <p>Relationship Type Lookup</p>

Field	Details
	Refers To PricingRecipe

ProcedureOutputResolution

Represents the pricing resolution for an pricing element determined using strategy name and formula. This object is available in API version 63.0 and later.

Supported Calls

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

Fields

Field	Details
BusinessVertical	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The business vertical associated with the procedure output resolution record. Possible values are: <ul style="list-style-type: none"> • RLM
DeveloperName	Type string Properties Create, Filter, Group, Sort, Update Description The name of the procedure output resolution.
Formula	Type string Properties Create, Filter, Group, Sort, Update Description The formula function used to determine the minimum or maximum price of a product. The supported operations are MIN and MAX.

Field	Details
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the procedure output resolution is active (true) or not (false). Only active procedure output resolutions can be applied to a procedure. The default value is <code>false</code>.</p>
IsInternal	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates if the procedure output resolution record is created internally by the Salesforce platform (true) or not (false). The default value is <code>false</code>.</p>
Language	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The languages in which pricing recipe is supported. Possible values are:</p> <ul style="list-style-type: none"> • <code>da</code>—Danish • <code>de</code>—German • <code>en_US</code>—English • <code>es</code>—Spanish • <code>es_MX</code>—Spanish (Mexico) • <code>fi</code>—Finnish • <code>fr</code>—French • <code>it</code>—Italian • <code>ja</code>—Japanese • <code>ko</code>—Korean • <code>nl_NL</code>—Dutch • <code>no</code>—Norwegian • <code>pt_BR</code>—Portuguese (Brazil) • <code>ru</code>—Russian

Field	Details
	<ul style="list-style-type: none"> • sv—Swedish • th—Thai • zh_CN—Chinese (Simplified) • zh_TW—Chinese (Traditional)
MasterLabel	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description A user-friendly name for procedure output resolution, which is defined when the procedure output resolution record is created.</p>
NamespacePrefix	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>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.</p> <p>The namespace prefix can have one of the following values.</p> <ul style="list-style-type: none"> • 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.
PricingElement	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies the pricing element on which the procedure output resolution is defined.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • ListPrice—List Price • MinimumPrice—Price Tracking • PriceAdjustmentMatrix—Price Adjustment Matrix

ProcedurePlanCriterion

Represents a criterion within a procedure plan option record. This object is available in API version 62.0 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
ActualValue	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The user-defined value that's compared to the value of the sObject field value.</p>
DataType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The data type of the field from the selected object.</p>
FieldPath	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The path of the field used in a procedure in relation to the object that the field belongs to.</p>
ObjectField	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description The Salesforce object field value used to resolve the procedure plan option.</p>
Operator	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The operator used by the procedure plan criterion. Valid values are:</p> <ul style="list-style-type: none"> • Equals • GreaterThan • GreaterThanOrEquals • In • IsNotNull • IsNull • LessThan • LessThanOrEquals • NotEquals • NotIn
ProcedurePlanOptionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The procedure plan option associated with the procedure plan criterion record. This field is a relationship field.</p> <p>Relationship Name ProcedurePlanOption</p> <p>Relationship Type Master-detail</p> <p>Refers To ProcedurePlanOption (the master object)</p>
Sequence	<p>Type int</p> <p>Properties Create, Filter, Group, Sort</p>

Field	Details
	<p>Description</p> <p>The sequence in which the conditions defined in the procedure plan criteria are processed.</p>

ProcedurePlanDefinition

Represents the setup of a unified procedure from a list of multiple procedures that can be sequenced in any order based on business needs. Each procedure plan definition contains sections and subsections where procedures can be configured by using a lookup table or rule-based criteria. This object is available in API version 62.0 and later.

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

Supported SOAP API Calls

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

Supported REST API Methods

DELETE, GET, HEAD, PATCH, POST, Query

Fields

Field	Details
Description	<p>Type</p> <p>textarea</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p>Description</p> <p>The description of the procedure plan definition.</p>
DeveloperName	<p>Type</p> <p>string</p> <p>Properties</p> <p>Create, Filter, Group, Sort, Update</p> <p>Description</p> <p>The unique name of the procedure plan definition record.</p> <p>This name must begin with a letter and use only alphanumeric characters and underscores. It can't include spaces, end with an underscore, or have two consecutive underscores.</p>
Language	<p>Type</p> <p>picklist</p>

Field	Details
	<p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The language of the procedure plan definition.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • da—Danish • de—German • en_US—English • es—Spanish • es_MX—Spanish (Mexico) • fi—Finnish • fr—French • it—Italian • ja—Japanese • ko—Korean • nl_NL—Dutch • no—Norwegian • pt_BR—Portuguese (Brazil) • ru—Russian • sv—Swedish • th—Thai • zh_CN—Chinese (Simplified) • zh_TW—Chinese (Traditional)
MasterLabel	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The master label of the procedure plan definition.</p>
NamespacePrefix	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>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.</p>

Field	Details
	<p>The namespace prefix can have one of the following values.</p> <ul style="list-style-type: none"> 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.
PrimaryObject	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort</p> <p>Description The object associated to the procedure plan definition. The fields in the object are used as variables in the procedure plan criterion.</p>
ProcessType	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Identify the business processes that need a procedure plan for each SObject and definition. Possible values are:</p> <ul style="list-style-type: none"> Billing DRO DeepClone—Deep Clone Default ProductDiscovery—Product Discovery RLM <p>The default value is <code>Default</code>.</p>

ProcedurePlanDefinitionVersion

Represents the versions for a procedure plan definition. Multiple versions under a procedure plan definition must be active at a time, which can be resolved at run time using the rank field. This object is available in API version 62.0 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
ContextDefinition	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The context definition associated with the procedure plan definition record. Valid values are:</p> <ul style="list-style-type: none"> • 11ODU00000007Zx2AI • 11ODU000000084F2AQ • CollectionPlanEvent__stdctx • CommerceCartContextDefinition__stdctx • SalesTransactionContext__stdctx • TestContextService__stdctx • TestDynamicAttribute__stdctx • TestExtendedDefinition__stdctx
DefaultReadContextMapping	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The default read context mapping used to read from the mapped object and populate the context definition.</p>
DefaultSaveContextMapping	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The save context mapping used to save from the context definition and populate the mapped object.</p>

Field	Details
DeveloperName	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The unique name of the procedure plan definition version record. This name must begin with a letter and use only alphanumeric characters and underscores. It can't include spaces, end with an underscore, or have two consecutive underscores.</p>
EffectiveFrom	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The date and time when the procedure plan definition comes into effect.</p>
EffectiveTo	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the procedure plan definition is no longer in effect.</p>
InheritedFrom	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort</p> <p>Description The template from which this procedure plan definition is created.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates if this procedure plan definition version is active (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
ProcedurePlanDefinitionId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Sort</p> <p>Description The procedure plan definition associated with this procedure plan definition version record. This field is a relationship field.</p> <p>Relationship Name ProcedurePlanDefinition</p> <p>Relationship Type Master-detail</p> <p>Refers To ProcedurePlanDefinition (the master object)</p>
Rank	<p>Type int</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The current rank of the procedure plan definition version that's used to determine which procedure plan definition version is executed .</p>

ProcedurePlanOption

Represents the selection criteria of how a procedure can be configured for a selected procedure plan section record. This object is available in API version 62.0 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
ApexClassId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The Apex class associated with the procedure plan option record. This field is a relationship field.</p> <p>Relationship Name ApexClass</p> <p>Refers To ApexClass</p>
ApexClassName	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The name of the Apex class associated with the procedure plan option record.</p>
CriteriaLogic	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The computation logic for the various conditions applied to an option.</p>
CtxDefinitionOutputFieldId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The context definition field that's associated with the decision table. This field is a relationship field.</p> <p>Relationship Name CtxDefinitionOutputField</p> <p>Refers To DecisionTableParameter</p>
CtxMappingOutputFieldId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p>

Field	Details
	<p>Description The context mapping field that's associated with the decision table. This field is a relationship field.</p> <p>Relationship Name CtxMappingOutputField</p> <p>Refers To DecisionTableParameter</p>
DecisionTableId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The decision table associated with the pricing procedure. This field is a relationship field.</p> <p>Relationship Name DecisionTable</p> <p>Refers To DecisionTable</p>
ExpressionSetApiName	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The API name of the expression set.</p>
ExpressionSetDefinitionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The expression set definition associated with the procedure plan option record. This field is a relationship field.</p> <p>Relationship Name ExpressionSetDefinition</p> <p>Refers To ExpressionSetDefinition</p>
ExpressionSetLabel	<p>Type string</p>

Field	Details
	<p>Properties Filter, Group, Nillable, Sort</p> <p>Description The label of the expression set definition.</p>
ExpressionSetOutputFieldId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The expression set output field that's associated with the decision table. This field is a relationship field.</p> <p>Relationship Name ExpressionSetOutputField</p> <p>Refers To DecisionTableParameter</p>
PrimaryObject	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The procedure plan definition associated with the procedure plan option record.</p>
Priority	<p>Type int</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The order in which the options are executed.</p>
ProcedurePlanSectionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The procedure plan section associated with the procedure plan option record. This field is a relationship field.</p> <p>Relationship Name ProcedurePlanSection</p>

Field	Details
	<p>Relationship Type Master-detail</p> <p>Refers To ProcedurePlanSection (the master object)</p>
ReadContextMapping	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The read context mapping used to read from the mapped object and populate the context definition.</p>
SaveContextMapping	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The save context mapping used to save from the context definition and populate the mapped object.</p>

ProcedurePlanSection

Represents various procedure setup sections for a procedure plan definition. Each section enables the setup of a procedure of a type that can be further determined by using a rule-based criteria or it can be set based on a selected lookup table. This object is available in API version 62.0 and later.

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

Supported SOAP API Calls

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

Supported REST API Methods

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

Fields

Field	Details
Description	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The description of the procedure plan section.</p>
IsInherited	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates if the section is inherited from a template (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
Phase	<p>Type string</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The phase associated with the procedure plan section record.</p>
ProcedurePlanVersionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The procedure plan version associated with this procedure plan section record. This field is a relationship field.</p> <p>Relationship Name ProcedurePlanVersion</p> <p>Relationship Type Master-detail</p> <p>Refers To ProcedurePlanDefinitionVersion (the master object)</p>
ResolutionType	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The type of resolution used to filter the procedure. Valid values are:</p> <ul style="list-style-type: none"> • Default • RuleBased
SectionType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort</p> <p>Description The type of procedure section. Valid values are:</p> <ul style="list-style-type: none"> • Custom • PricingDiscoveryProcedure • PricingProcedure • ProductDiscoveryProcedure
Sequence	<p>Type int</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The sequence in which the procedures are processed.</p>
SubSectionType	<p>Type string</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The procedure subsection added to the procedure plan definition.</p>

ProcedurePlanVariable

Represents the setup for any adhoc user-defined variable that can be linked to a procedure plan definition record. This object is available in API version 62.0 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
DataType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The data type of the input procedure plan variable.</p>
DefaultValue	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The default value for the user-defined procedure plan variable.</p>
DeveloperName	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The unique name of the procedure plan variable record. This name must begin with a letter and use only alphanumeric characters and underscores. It can't include spaces, end with an underscore, or have two consecutive underscores.</p>
Label	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The label of the procedure plan variable.</p>
ProcedurePlanVersionId	<p>Type reference</p>

Field**Details**

Properties

Create, Filter, Group, Sort

Description

The procedure plan version associated with the procedure plan variable record.

This field is a relationship field.

Relationship Name

ProcedurePlanVersion

Relationship Type

Master-detail

Refers To

ProcedurePlanDefinitionVersion (the master object)

CHAPTER 5 Rate Management

In this chapter ...

- [Rate Management Standard Objects](#)
- [Rate Management Metadata API Types](#)
- [Rate Management Business APIs](#)
- [Rate Management Standard Invocable Actions](#)

Quote and price products based on predefined rates for future use of the product or service.

SEE ALSO:

[Salesforce Help: Rate Management Permission Set Licenses](#)

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer** Editions of Revenue Cloud where Rate Management is enabled

Rate Management Standard Objects

The Rate Management data model provides objects and fields to manage rates and discounts for a product's resource consumption.

[BindingObjectCustomExt](#)

Represents the external or custom target object that's bound to the entitlements granted with the sellable product. This object is available in API version 64.0 and later.

[BindingObjectRateAdjustment](#)

Represents the rate adjustments of the usage resource associated with the binding object that's used to charge over consumption. This object is available in API version 64.0 and later.

[BindingObjectRateCardEntry](#)

Represents the rate card entry details of the usage resource associated with the binding object that's used to charge over consumption. This object is available in API version 64.0 and later.

[PriceBookRateCard](#)

Represents a junction between price book and rate card objects. This object is available in API version 62.0 and later.

[RateAdjustmentByAttribute](#)

Represents the adjustments that determine the rate of a resource based on its rate-impacting attributes. These attributes are linked to the usage product record. Rates are then influenced by conditions specified in the Attribute Based Adjustment Condition object. Finally, the charge rate is determined by using the Attribute Based Adjustment Rule object. This object is available in API version 62.0 and later.

[RateAdjustmentByTier](#)

Represents the adjustments for the rate of a resource that's determined based on the specified tiers. This object stores information about the type of adjustment used, the value of the adjustment type, and any applicable boundaries. This object is available in API version 62.0 and later.

[RateCard](#)

Represents the rules used to rate the consumption of a group of resources within a product. Usage of a resource is billed at a specified rate if the user consumes more than their allowance for a time period. This object is available in API version 62.0 and later.

[RateCardEntry](#)

Represents a rule that determines the charge rate for using a product's resource. Each entry is linked to one rate card exclusively, and its activation or deactivation can be controlled by assigning effective dates. This object is available in API version 62.0 and later.

[RatingFrequencyPolicy](#)

Represents the policy that defines the frequency at which rating is triggered for the ratable summary records. This object is available in API version 62.0 and later.

[RatingRequest](#)

Represents the common run-time parameters, such as context definition and rating procedure for a set of records in the rateable summary table. This object is available in API version 62.0 and later.

[RatingRequestBatchJob](#)

Represents a junction between the rating request and batch job objects. This object is available in API version 62.0 and later.

SEE ALSO:

[Object Reference for the Salesforce Platform: Overview of Salesforce Objects and Fields](#)

[SOAP API Developer Guide: Introduction to SOAP API](#)

BindingObjectCustomExt

Represents the external or custom target object that's bound to the entitlements granted with the sellable product. This object is available in API version 64.0 and later.

Supported Calls

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

Special Access Rules

- This object is available in Revenue Cloud when Rate Management is enabled.
- Users with any Rate Management permission set (Admin, Manager, Designtime, Runtime) can view records. Only Admins can create, edit, and delete records.


Fields

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date when this record was last referenced.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the binding custom object record.</p>
OwnerId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the owner of the product usage grant. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>

BindingObjectRateAdjustment

Represents the rate adjustments of the usage resource associated with the binding object that's used to charge over consumption. This object is available in API version 64.0 and later.

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

Supported Calls

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

Special Access Rules

- This object is available in Revenue Cloud when Rate Management is enabled.
- Users with any Rate Management permission set (Admin, Manager, Designtime, Runtime) can view records.

Fields

Field	Details
<code>AdjustmentType</code>	<p>Type picklist</p> <p>Properties Filter, Group, Restricted picklist, Sort</p> <p>Description The type of rate adjustment related to the associated rate card entry. Valid values are:</p> <ul style="list-style-type: none"> • Amount • Override • Percentage

Field	Details
AdjustmentValue	<p>Type double</p> <p>Properties Filter, Sort</p> <p>Description The value of the rate adjustment based on the adjustment type.</p>
BindingObjectRateCardEntryId	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description The binding object rate card entry associated with the binding object rate adjustment. This field is a relationship field.</p> <p>Relationship Name BindingObjectRateCardEntry</p> <p>Relationship Type Master-detail</p> <p>Refers To BindingObjectRateCardEntry (the master object)</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp for when the current user last referred to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp for when the current user last viewed a record related to this record.</p>
LowerBound	<p>Type double</p> <p>Properties Filter, Sort</p>

Field	Details
	<p>Description</p> <p>The minimum quantity of the rate adjustment value that can be applied to the binding object rate adjustment record. This must be a positive number that's less than or equal to the upper bound of the tier.</p>
Name	<p>Type</p> <p>string</p> <p>Properties</p> <p>Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description</p> <p>The autogenerated identifier for the binding object rate adjustment record.</p>
UpperBound	<p>Type</p> <p>double</p> <p>Properties</p> <p>Filter, Nillable, Sort</p> <p>Description</p> <p>The maximum quantity of the rate adjustment value that can be applied to the binding object rate adjustment record. This must be a positive number. Set this value one digit higher than the quantity you want the tier to include.</p>

Associated Objects

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

[BindingObjectRateAdjustmentFeed](#)

Feed tracking is available for the object.

[BindingObjectRateAdjustmentHistory](#)

History is available for tracked fields of the object.

[BindingObjectRateAdjustmentShare](#)

Sharing is available for the object.

BindingObjectRateCardEntry

Represents the rate card entry details of the usage resource associated with the binding object that's used to charge over consumption. This object is available in API version 64.0 and later.

Supported Calls

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

Special Access Rules

- This object is available in Revenue Cloud when Rate Management is enabled.
- Users with any Rate Management permission set (Admin, Manager, Designtime, Runtime) can view records.

Fields

Field	Details
BindingObjectId	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description The object associated with the entitlements that are granted with the sellable product. This field is a polymorphic relationship field.</p> <p>Relationship Name BindingObject</p> <p>Refers To Account, BindingObjectCustomExt, Contract</p>
BindingObjectRateOrder	<p>Type double</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The order that determines the applicable binding object rate when multiple rates are defined for an Anchor target within an effective period. Available in API version 65.0 and later.</p>
EffectiveFrom	<p>Type dateTime</p> <p>Properties Filter, Sort</p> <p>Description The date and time when the associated rate card entry comes into effect.</p>
EffectiveTo	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date and time until which the associated rate card entry remains effective.</p>

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp for when the current user last referred to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp for when the current user last viewed a record related to this record.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The autogenerated identifier for the binding object rate card entry record. For example, BORCE-00004 or BORCE-4567.</p>
NegotiatedRate	<p>Type double</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The rate negotiated for the associated binding object.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who created the record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>

Field	Details
RateCardEntryId	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description The rate card entry associated with the binding object. This field is a relationship field.</p> <p>Relationship Name RateCardEntry</p> <p>Refers To RateCardEntry</p>
RateCardId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The rate card associated to the binding object. This field is a relationship field.</p> <p>Relationship Name RateCard</p> <p>Refers To RateCard</p>
RateCardType	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description The type of the rate card associated with the binding object rate card entry. Valid values are:</p> <ul style="list-style-type: none"> • Attribute • Base • Tier
RateUnitOfMeasureId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p>

Field	Details
	<p>Description The standard unit of measure associated with the rate defined for the binding object. This field is a relationship field.</p> <p>Relationship Name RateUnitOfMeasure</p> <p>Refers To UnitOfMeasure</p>
SourceAssetId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The asset that's used to create the binding object rate card entry. This field is a relationship field.</p> <p>Relationship Name SourceAsset</p> <p>Refers To Asset</p>
UsageResourceId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The usage resource associated with the binding object rate card entry. This field is a relationship field.</p> <p>Relationship Name UsageResource</p> <p>Refers To UsageResource</p>

Associated Objects

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

[BindingObjectRateAdjustmentFeed](#)

Feed tracking is available for the object.

[BindingObjectRateAdjustmentHistory](#)

History is available for tracked fields of the object.

BindingObjectRateAdjustmentShare

Sharing is available for the object.

PriceBookRateCard

Represents a junction between price book and rate card objects. This object is available in API version 62.0 and later.

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

Supported Calls

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

Fields

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp for when the current user last referred to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp for when the current user last viewed a record related to this record.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Auto-generated identifier for the price book rate card record.</p>
PriceBookId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p>

Field	Details
	<p>Description Price book ID that's associated with the rate cards IDs. For Quote, Order, and Contracts, the price book IDs identify the associated rate cards. This field is a relationship field.</p> <p>Relationship Name PriceBook</p> <p>Relationship Type Master-detail</p> <p>Refers To Pricebook2 (the master object)</p>
RateCardId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Rate card ID that's associated with the price book. This field is a relationship field.</p> <p>Relationship Name RateCard</p> <p>Relationship Type Master-detail</p> <p>Refers To RateCard (the detail object)</p>
RateCardType	<p>Type picklist</p> <p>Properties Filter, Group, Restricted picklist, Sort</p> <p>Description Type of rate card associated with the price book. Valid values are:</p> <ul style="list-style-type: none"> • Attribute • Base • Tier

Associated Objects

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

PriceBookRateCardFeed


Feed tracking is available for the object.

PriceBookRateCardHistory

History is available for tracked fields of the object.

RateAdjustmentByAttribute

Represents the adjustments that determine the rate of a resource based on its rate-impacting attributes. These attributes are linked to the usage product record. Rates are then influenced by conditions specified in the Attribute Based Adjustment Condition object. Finally, the charge rate is determined by using the Attribute Based Adjustment Rule object. This object is available in API version 62.0 and later.

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

Supported Calls

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

Fields

Field	Details
AdjustmentType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Type of rate adjustment. Valid values are:</p> <ul style="list-style-type: none"> Amount Override Percentage
AdjustmentValue	<p>Type double</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description Value of the rate adjustment based on the selected adjustment type.</p>
AttributeBasedAdjRuleId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Sort, Update</p> <p>Description ID of the attribute based adjustment rule associated with this rate adjustment by attribute record. This field is a relationship field.</p> <p>Relationship Name AttributeBasedAdjRule</p> <p>Refers To AttributeBasedAdjRule</p>
EffectiveFrom	<p>Type dateTime</p> <p>Properties Filter, Sort</p> <p>Description Date and time when the associated rate card entry comes into effect.</p>
EffectiveTo	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Date and time until when the associated rate card entry remains effective.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp for when the current user last referred to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp for when the current user last viewed a record related to this record.</p>
Name	<p>Type string</p>

Field	Details
	<p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Auto-generated identifier for the rate adjustment by attribute record.</p>
ProductId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description ID of the product whose resource is being used as the associated rate card entry. This field is a relationship field.</p> <p>Relationship Name Product</p> <p>Refers To Product2</p>
ProductSellingModelId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description ID of the product selling model for the associated rate card entry. This field is a relationship field.</p> <p>Relationship Name ProductSellingModel</p> <p>Refers To ProductSellingModel</p>
RateCardEntryId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description ID of the rate card entry associated with this rate adjustment by attribute record. This field is a relationship field.</p> <p>Relationship Name RateCardEntry</p> <p>Relationship Type Master-detail</p>

Field	Details
	<p>Refers To RateCardEntry (the master object)</p>
RateCardEntryStatus	<p>Type picklist</p> <p>Properties Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Status of the rate card entry associated with this rate adjustment by attribute. Valid values are:</p> <ul style="list-style-type: none"> • Active • Draft • Inactive <p>The default value is <code>Draft</code>. Available in API version 63.0 and later.</p>
RateCardId	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description ID of the rate card of the associated rate card entry. This field is a relationship field.</p> <p>Relationship Name RateCard</p> <p>Refers To RateCard</p>
RateUnitOfMeasureId	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description ID of the standard unit of measure record of the associated rate card entry. This field is a relationship field.</p> <p>Relationship Name RateUnitOfMeasure</p> <p>Refers To UnitOfMeasure</p>

Field	Details
RateUnitOfMeasureName	<p>Type string</p> <p>Properties Filter, Group, Sort</p> <p>Description Name of the standard unit of measure record of the associated rate card entry.</p>
UsageResourceId	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description ID of the resource selected for the associated rate card entry. This field is a relationship field.</p> <p>Relationship Name UsageResource</p> <p>Refers To UsageResource</p>

Associated Objects

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

[RateAdjustmentByAttributeFeed](#)


Feed tracking is available for the object.

[RateAdjustmentByAttributeHistory](#)

History is available for tracked fields of the object.

RateAdjustmentByTier

Represents the adjustments for the rate of a resource that's determined based on the specified tiers. This object stores information about the type of adjustment used, the value of the adjustment type, and any applicable boundaries. This object is available in API version 62.0 and later.

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

Supported Calls

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

Fields

Field	Details
AdjustmentType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Type of rate adjustment. Valid values are:</p> <ul style="list-style-type: none"> • Amount • Override • Percentage
AdjustmentValue	<p>Type double</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description Value of the rate adjustment based on the selected adjustment type.</p>
EffectiveFrom	<p>Type dateTime</p> <p>Properties Filter, Sort</p> <p>Description Date and time when the associated rate card entry comes into effect.</p>
EffectiveTo	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Date and time until when the associated rate card entry remains effective.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp for when the current user last referred to this record.</p>

Field	Details
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp for when the current user last viewed a record related to this record.</p>
LowerBound	<p>Type double</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description Minimum quantity of the rate adjustment value that can be applied to the record. This value must be a positive integer and must be less than the upper bound of the tier.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Auto-generated identifier for the rate adjustment by tier record.</p>
ProductId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description ID of the product whose resource is being used as the associated rate card entry. This field is a relationship field.</p> <p>Relationship Name Product</p> <p>Refers To Product2</p>
ProductSellingModelId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description ID of the product selling model for the associated rate card entry record. This field is a relationship field.</p>

Field	Details
	<p>Relationship Name ProductSellingModel</p> <p>Refers To ProductSellingModel</p>
RateCardEntryId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description ID of the rate card entry associated with this rate adjustment by tier record. This field is a relationship field.</p> <p>Relationship Name RateCardEntry</p> <p>Relationship Type Master-detail</p> <p>Refers To RateCardEntry (the master object)</p>
RateCardEntryStatus	<p>Type picklist</p> <p>Properties Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Status of the rate card entry associated with this rate adjustment by tier. Valid values are:</p> <ul style="list-style-type: none"> • Active • Draft • Inactive <p>The default value is <code>Draft</code>. Available in API version 63.0 and later.</p>
RateCardId	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description ID of the rate card of the associated rate card entry. This field is a relationship field.</p> <p>Relationship Name RateCard</p>

Field	Details
	<p>Refers To RateCard</p>
RateUnitOfMeasureId	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description ID of the standard unit of measure record of the associated rate card entry. This field is a relationship field.</p> <p>Relationship Name RateUnitOfMeasure</p> <p>Refers To UnitOfMeasure</p>
RateUnitOfMeasureName	<p>Type string</p> <p>Properties Filter, Group, Sort</p> <p>Description Name of the standard unit of measure record of the associated rate card entry.</p>
UpperBound	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Maximum quantity of the rate adjustment value that can be applied to the record. This value must be a positive double and must be greater than the lower bound of the tier.</p>
UsageResourceId	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description ID of the resource selected for the associated rate card entry. This field is a relationship field.</p> <p>Relationship Name UsageResource</p> <p>Refers To UsageResource</p>

Associated Objects

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

RateAdjustmentByTierFeed

Feed tracking is available for the object.

RateAdjustmentByTierHistory

History is available for tracked fields of the object.

RateCard

Represents the rules used to rate the consumption of a group of resources within a product. Usage of a resource is billed at a specified rate if the user consumes more than their allowance for a time period. 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
Description	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Description about the rate card.</p>
EffectiveFrom	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description Date and time when the rate card becomes effective.</p>
EffectiveTo	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Date and time until when the rate card remains effective.</p>

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp for when the current user last referred to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp for when the current user last viewed a record related to this record.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Name of the rate card.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the user who created the record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Type of rate card. Valid values are:</p> <ul style="list-style-type: none"> • Attribute

Field	Details
	<ul style="list-style-type: none"> • Base • Tier

Associated Objects

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

RateCardFeed

Feed tracking is available for the object.

RateCardHistory

History is available for tracked fields of the object.

RateCardShare

Sharing is available for the object.

RateCardEntry

Represents a rule that determines the charge rate for using a product's resource. Each entry is linked to one rate card exclusively, and its activation or deactivation can be controlled by assigning effective dates. 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
DefaultUnitOfMeasureClassId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description ID of the default unit of measure classification record associated with this rate card entry. This field is a relationship field.</p> <p>Relationship Name DefaultUnitOfMeasureClass</p> <p>Refers To UnitOfMeasureClass</p>
DefaultUnitOfMeasureId	<p>Type reference</p>

Field	Details
	<p>Properties Filter, Group, Nillable, Sort</p> <p>Description ID of the default unit of measure record associated with this rate card entry. This field is a relationship field.</p> <p>Relationship Name DefaultUnitOfMeasure</p> <p>Refers To UnitOfMeasure</p>
EffectiveFrom	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description Date and time when the rate card entry comes into effect.</p>
EffectiveTo	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Date and time until when the rate card entry remains effective.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp for when the current user last referred to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp for when the current user last viewed a record related to this record.</p>
Name	<p>Type string</p>

Field	Details
	<p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Auto-generated identifier for the rate card entry record.</p>
ProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description ID of the product whose resource is being used as a rate card entry. This field is a relationship field.</p> <p>Relationship Name Product</p> <p>Refers To Product2</p>
ProductSellingModelId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description ID of the product selling model associated with this rate card entry. This field is a relationship field.</p> <p>Relationship Name ProductSellingModel</p> <p>Refers To ProductSellingModel</p>
Rate	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Value of the rate card entry.</p>
RateCardId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p>

Field	Details
	<p>Description ID of the rate card associated with this rate card entry. This field is a relationship field.</p> <p>Relationship Name RateCard</p> <p>Relationship Type Master-detail</p> <p>Refers To RateCard (the master object)</p>
RateCardType	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Type of rate card associated with this rate card entry. Valid values are:</p> <ul style="list-style-type: none"> • Attribute • Base • Tier <p>Available in API version 63.0 and later.</p>
RateNegotiation	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Type of rate negotiation applicable to the rate card entry. Valid values are:</p> <ul style="list-style-type: none"> • Negotiable • NonNegotiable <p>The default value is <code>Negotiable</code>. Available in API version 63.0 and later.</p>
RateUnitOfMeasureClassId	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description ID of the unit of measure classification record associated with this rate card entry.</p>

Field	Details
	<p>This field is a relationship field.</p> <p>Relationship Name RateUnitOfMeasureClass</p> <p>Refers To UnitOfMeasureClass</p>
RateUnitOfMeasureId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description ID of the standard unit of measure record associated with this rate card entry. This field is a relationship field.</p> <p>Relationship Name RateUnitOfMeasure</p> <p>Refers To UnitOfMeasure</p>
RateUnitOfMeasureName	<p>Type string</p> <p>Properties Filter, Group, Sort</p> <p>Description Name of the standard unit of measure record of the associated rate card entry.</p>
Status	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Status of the rate card entry.</p> <ul style="list-style-type: none"> • Active • Draft • Inactive <p>The default value is <code>Draft</code>. Available in API version 63.0 and later.</p>
UsageProductId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p>

Field	Details
	<p>Description ID of the product associated with the resource for which the rate is specified. This field is a relationship field.</p> <p>Relationship Name UsageProduct</p> <p>Refers To Product2</p>
UsageResourceId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description ID of the resource associated with this rate card entry. This field is a relationship field.</p> <p>Relationship Name UsageResource</p> <p>Refers To UsageResource</p>

Associated Objects

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

[RateCardEntryFeed](#)

Feed tracking is available for the object.

[RateCardEntryHistory](#)

History is available for tracked fields of the object.

RatingFrequencyPolicy

Represents the policy that defines the frequency at which rating is triggered for the ratable summary records. 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
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp for when the current user last referred to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp for when the current user last viewed a record related to this record.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Auto-generated identifier for the rating frequency policy record.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description ID of the user who created the record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
ProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description ID of the product for which the rating policy is defined.</p>

Field	Details
	<p>This field is a relationship field. This field is deprecated and will be retired in a future version.</p> <p>Relationship Name Product</p> <p>Refers To Product2</p>
RatingDelayDuration	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Duration of delay—in hours—post the billing period after which the rating is to be triggered.</p>
RatingDelayDurationUnit	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the unit for the specified rating delay duration. Available in API version 65.0 and later.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • Days • Hours
RatingPeriod	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Period for which the usage of a product and usage resource combination are to be rated.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • Daily • Monthly
UsageResourceId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description ID of the usage resource for which the rating policy is defined.</p> <p>This field is a relationship field. This field is deprecated and will be retired in a future version.</p>

Field	Details
	<p>Relationship Name UsageResource</p> <p>Refers To UsageResource</p>

Associated Objects

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

RatingFrequencyPolicyFeed

Feed tracking is available for the object.

RatingFrequencyPolicyHistory

History is available for tracked fields of the object.

RatingFrequencyPolicyShare

Sharing is available for the object.

RatingRequest

Represents the common run-time parameters, such as context definition and rating procedure for a set of records in the rateable summary table. 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
ContextDefinition	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Context definition that's used for context instance creation, which encapsulates all aggregated records that are stamped for the rating request.</p>
ContextMapping	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description</p> <p>Context mapping that's used for context instance creation, which encapsulates all aggregated records that are stamped for the rating request. If no ID is provided, default context mapping is used.</p>
DoesExcludeWaterfall	<p>Type</p> <p>boolean</p> <p>Properties</p> <p>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description</p> <p>Indicates whether the waterfall isn't generated for the rating request (<code>true</code>) or is generated (<code>false</code>). The default value is <code>false</code>. Available in API version 64.0 and later.</p>
LastReferencedDate	<p>Type</p> <p>dateTime</p> <p>Properties</p> <p>Filter, Nillable, Sort</p> <p>Description</p> <p>Timestamp for when the current user last referred to this record.</p>
LastViewedDate	<p>Type</p> <p>dateTime</p> <p>Properties</p> <p>Filter, Nillable, Sort</p> <p>Description</p> <p>Timestamp for when the current user last viewed a record related to this record.</p>
Name	<p>Type</p> <p>string</p> <p>Properties</p> <p>Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description</p> <p>Auto-generated identifier for the rating request record.</p>
OwnerId	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description</p> <p>ID of the user who created the record.</p> <p>This field is a polymorphic relationship field.</p>

Field	Details
	<p>Relationship Name Owner</p> <p>Refers To Group, User</p>
RatingProcedureName	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Procedure name that's used to rate the aggregated records that are stamped for rating request.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Status of the rating request. Valid values are:</p> <ul style="list-style-type: none"> • Failed • Pending • RatingComplete • RatingInProgress • ReadyForRating

Associated Objects

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

[RatingRequestFeed](#)

Feed tracking is available for the object.

[RatingRequestHistory](#)

History is available for tracked fields of the object.

[RatingRequestShare](#)

Sharing is available for the object.

RatingRequestBatchJob

Represents a junction between the rating request and batch job objects. This object is available in API version 62.0 and later.

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

Supported Calls

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

Fields

Field	Details
BatchJobId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description ID of the batch job that triggered the rating request on the aggregated records. This field is a relationship field.</p> <p>Relationship Name BatchJob</p> <p>Refers To BatchJob</p>
ErrorCode	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Error code that defines the batch job failure. Valid values are:</p> <ul style="list-style-type: none"> • <code>BadRequest</code> • <code>InternalError</code>
ErrorMessage	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Error message that describes the cause of the batch job failure.</p>
LastReferencedDate	<p>Type dateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp for when the current user last referred to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp for when the current user last viewed a record related to this record.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Name of the rating request batch job record.</p>
RatingRequestId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description ID of the rating request record associated with the batch job. This field is a relationship field.</p> <p>Relationship Name RatingRequest</p> <p>Relationship Type Master-detail</p> <p>Refers To RatingRequest (the master object)</p>

Associated Objects

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

[RatingRequestBatchJobFeed](#)

Feed tracking is available for the object.

[RatingRequestBatchJobHistory](#)

History is available for tracked fields of the object.

Rate Management Metadata API Types

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

[IndustriesRatingSettings](#)

Represents the settings for Rate Management.

[Flow for Rate Management](#)

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

IndustriesRatingSettings

Represents the settings for Rate Management.

Parent Type and Manifest Access

This type extends the [Metadata](#) metadata type and inherits its `fullName` field.

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

File Suffix and Directory Location

The `IndustriesRatingSettings` values are stored in the `IndustriesRating.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

`IndustriesRatingSettings` components are available in API version 62.0 and later.

Special Access Rules

This metadata type is available with Rate Management.

Fields

Field Name	Description
<code>enableRating</code>	<p>Field Type boolean</p> <p>Description Indicates whether to enable Rate Management (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
<code>enableRatingWaterfall</code>	<p>Field Type boolean</p>

Field Name	Description
	<p>Description</p> <p>Indicates whether to enable Rating Waterfall (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>. Rating Waterfall provides insights into the rating data, which you can synchronize with your rating lookup tables.</p>
<code>enableRatingWaterfallPersistence</code>	<p>Field Type</p> <p>boolean</p> <p>Description</p> <p>Indicates whether to enable Rating Waterfall Persistence (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>. Rating Waterfall Persistence stores rating data, which you can use to enhance the internal processes and increase efficiency.</p>

Declarative Metadata Sample Definition

The following is an example of an `IndustriesRatingSettings` component.

```
<IndustriesRatingSettings xmlns="http://soap.sforce.com/2006/04/metadata">
  <enableRating>true</enableRating>
  <enableRatingWaterfall>true</enableRatingWaterfall>
  <enableRatingWaterfallPersistence>true</enableRatingWaterfallPersistence>
</IndustriesRatingSettings>
```

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>IndustriesRating</members>
    <name>Settings</name>
  </types>
  <version>65.0</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 Rate Management

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

FlowActionCall

Rate Management exposes additional `actionType` values for the `FlowActionCall` metadata type.

Field Name	Field Type	Description
<code>actionType</code>	<code>InvocableActionType</code> (enumeration of type string)	Required. The action type. Additional valid values for Rate Management include: <ul style="list-style-type: none"> <code>invokeRatingService</code>—Invoke the rating service to rate the usage records.

Rate Management Business APIs

Use the Rate Management Business APIs to get rate plan and persisted rating waterfall details.

Resources

Learn more about the available Rate Management API resources.

Response Bodies

Learn more about the available response bodies of Rate Management APIs.

SEE ALSO:

[Connect REST API Developer Guide: Introduction](#)

Resources

Learn more about the available Rate Management API resources.

Rate Plan (GET)

Get a rate plan for a specified set of context input. Use this API to retrieve rate cards, rate card entries, and related adjustments based on the filter criteria for the context input.

Rating Waterfall (GET)

Get the persisted rating waterfall that stores the process logs. Rating waterfall provides insights into the internal rating process.

Rate Plan (GET)

Get a rate plan for a specified set of context input. Use this API to retrieve rate cards, rate card entries, and related adjustments based on the filter criteria for the context input.

Keep these considerations in mind when you use this API.

- This API request supports one pricebook and one sellable product.
- The ID of the product is required to invoke this API.
- Invoke this API even if a hydrated context is available to fetch the rate card, rate card entry, and adjustment details.

Special Access Rules

The org must have the Rate Management: Run Time User permission set to use this API. Additionally, the org must also have a default usage rating discovery procedure defined in the Revenue Settings from Setup.

Resource

```
/connect/core-rating/rate-plan
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/core-rating/rate-plan?contextId=858a3ad3e5a0e5c319652a6ab92f6fdb2b4fa8be72b390506d014596c6da62c9&procedureApiName=SampleProcedure
```

Available version

62.0

HTTP methods

GET

Request parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
contextId	String	ID of the context to specify as an input to the procedure.	Required	62.0
procedure ApiName	String	API name of the procedure to be executed.	Required	62.0

Response body for GET

[Rate Plan Response](#)

Rating Waterfall (GET)

Get the persisted rating waterfall that stores the process logs. Rating waterfall provides insights into the internal rating process.

Resource

```
/connect/core-pricing/waterfall/lineItemId/executionId
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/core-pricing/waterfall/Gold2/HNW02974457?tagsFilter=UnitPriceUsageTypeRating
```

Available version

62.0

HTTP methods

GET

Query parameters

Name	Type	Description	Required or Optional	Available Version
tagsToFilter	String	Comma-separated tags to filter.	Optional	62.0
usageType	String	Usage type of the waterfall log record. Valid values are: <ul style="list-style-type: none"> • <code>Rating</code> • <code>Pricing</code>—Specifies that the record type is <code>Pricing</code>. If this value is specified, the API creates a log of pricing waterfall. See Pricing Waterfall. The default value is <code>Pricing</code> .	Optional	62.0

Response body for GET

[Line Item Waterfall Response](#)

Response Bodies

Learn more about the available response bodies of Rate Management APIs.

[Adjustment Details](#)

Output representation of a rate adjustment request.

[Line Item Waterfall Response](#)

Output representation of the line item waterfall response.

[Rate Plan Response](#)

Output representation of the details of a rate plan.

[Rating Error Response](#)

Output representation of the error details related to the API request.

[Rating Waterfall Response](#)

Output representation of a rating waterfall request.

Adjustment Details

Output representation of a rate adjustment request.

JSON example

```
"pricingElement": {
  "adjustments": [{
    "adjustmentType": null,
    "adjustmentValue": null
```

```

    }],
    "name": "List Price",
    "elementType": "ListPrice"
  }

```

Property Name	Type	Description	Filter Group and Version	Available Version
adjustments	Map<String, Object>[]	Details of the rate element.	Small, 60.0	60.0
description	String	Description of the rate element.	Small, 60.0	60.0
elementType	String	Type of the rate element.	Small, 60.0	60.0
name	String	Name of the rate element.	Small, 60.0	60.0

Line Item Waterfall Response

Output representation of the line item waterfall response.

JSON example

```

{
  "currencyCode": "USD",
  "error": null,
  "executionEndTimestamp": "2023-07-31T20:11:29.625Z",
  "executionId": "gdLVwn2xluats2xWMAjV",
  "executionStartTimestamp": null,
  "lineItemId": "item1",
  "success": true,
  "usageType": "Rating",
  "output": {
    "quantity": "10",
    "netUnitPrice": "10",
    "subtotal": "100"
  },
  "waterfall": []
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
context Definition VersionId	String	Context definition version ID of the rating procedure.	Small, 62.0	62.0
context MappingId	String	Context mapping ID of the record.	Small, 62.0	62.0
currencyCode	String	Currency code. For example, USD or INR.	Small, 62.0	62.0
error	Rating Error Response	Details of any errors.	Small, 62.0	62.0

Property Name	Type	Description	Filter Group and Version	Available Version
executionEnd Timestamp	String	End timestamp of procedure execution.	Small, 62.0	62.0
executionId	String	Execution ID of a particular execution of a rating procedure.	Small, 62.0	62.0
execution Start Timestamp	String	Start timestamp of procedure execution.	Small, 62.0	62.0
lineItemId	String	Line item ID for which the price is being calculated.	Small, 62.0	62.0
output	Map<String, Object>	Output of the rating procedure.	Small, 62.0	62.0
success	Boolean	Indicates whether the API request is successful (<code>true</code>) or not (<code>false</code>).	Small, 62.0	62.0
usageType	String	Usage type of the waterfall log record.	Small, 62.0	62.0
waterfall	Rating Waterfall Response[]	Details of the rating waterfall.	Small, 62.0	62.0

Rate Plan Response

Output representation of the details of a rate plan.

JSON example

```
{
  "success": true,
  "executionId" : "a521d592-71c3-4db3-8048-r64504df1605",
  "error": {}
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
error	Rating Error Response[]	Error response for the API request, if any.	Small, 62.0	62.0
executionId	String	ID of the procedure execution record.	Small, 62.0	62.0
success	Boolean	Indicates whether the request is successful (<code>true</code>) or not (<code>false</code>).	Small, 62.0	62.0

Rating Error Response

Output representation of the error details related to the API request.

Property Name	Type	Description	Filter Group and Version	Available Version
errorCode	String	Code indicating the type of error.	Small, 62.0	62.0
message	String	Message stating the reason for error, if any.	Small, 62.0	62.0

Rating Waterfall Response

Output representation of a rating waterfall request.

JSON example

```
{
  "inputParameters": {
    "productId": "01txx0000006i2SAAQ",
    "pricebookId": "01sxx0000005ptpAAA",
    "pricingModelType": "OneTime"
  },
  "fieldToTagNameMapping": {
    "Product2Id": "ItemProduct",
    "Subtotal": "Subtotal",
    "Pricebook2Id": "Pricebook",
    "Quantity": "ItemQuantity",
    "LineItemId": "SalesTransactionSource",
    "ListPrice": "ItemListPrice"
  },
  "sequence": 0,
  "outputParameters": {
    "listPrice": "10"
  },
  "pricingElement": {
    "adjustments": [
      {
        "adjustmentType": null,
        "adjustmentValue": null
      }
    ],
    "name": "List Price"
  }
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
fieldToTagNameMapping	Map<String, String>	Mappings of field to tag names.	Small, 62.0	62.0
inputParameters	Map<String, Object>	Parameters of rating element input.	Small, 62.0	62.0

Property Name	Type	Description	Filter Group and Version	Available Version
output Parameters	Map<String, Object>	Parameters of rating element output.	Small, 62.0	62.0
pricing Element	Adjustment Details	Details of the rate adjustment of a rating element.	Small, 62.0	62.0
sequence	Integer	Sequence of rating element execution.	Small, 62.0	62.0

Rate Management Standard Invocable Actions

Learn more about the standard invocable actions available with Rate Management.

[Invoke Rating Service Action](#)

Invoke the rating service to rate the usage records.

SEE ALSO:

[Actions Developer Guide: Overview](#)

[REST API Developer Guide: Invocable Actions Standard](#)

[Metadata API Developer Guide: Understanding Metadata API](#)

Invoke Rating Service Action

Invoke the rating service to rate the usage records.

The Invoke Rating Service action acts as a connector between batch management and the rating service. This action is available in API version 62.0 and later.

Special Access Rules

The Invoke Rating Service action is available in Enterprise, Unlimited, and Developer Editions where Rate Management is enabled.

Supported REST HTTP Methods

URI

`/services/data/v65.0/actions/standard/invokeRatingService`

Formats

JSON, XML

HTTP Methods

POST

Authentication

Authorization: Bearer *token*

Inputs

Input	Details
attributeRateCardID	<p>Type string</p> <p>Description ID of the rate card that's used to define adjustments based on the attributes that impact the rate.</p>
baseRateCardID	<p>Type string</p> <p>Description ID of the rate card that includes the base rate for the resource to be rated, based on its consumption.</p>
contextDefinitionId	<p>Type string</p> <p>Description Required. ID of the context definition that's used to create the context instance.</p>
contextMappingID	<p>Type string</p> <p>Description ID of the context mapping that maps a standard object, context definition object, or any other input data source to the node that's defined in the context definition.</p>
isSkipWaterfall	<p>Type boolean</p> <p>Description Indicates whether to skip the generation of price waterfall data (<code>true</code>) or not (<code>false</code>).</p>
procedureName	<p>Type string</p> <p>Description Name of the rating procedure that's used to calculate the rates.</p>
recordID	<p>Type reference</p> <p>Description Required. ID of the usage ratable summary record to be rated.</p>

Input	Details
tierRateCardID	Type string
	Description ID of the rate card that's used to define adjustments for different tiers of a resource.

Outputs

None

Example

POST

This example shows a sample request for the Invoke Rating Service action.

```
{
  "inputs": [
    {
      "recordIDs": "56jSB000002Bn12CXC",
      "contextMappingId": "11jSB000002Bn13YAC",
      "contextDefinitionId": "11OSB0000000WSv2AM",
      "procedureName": "Invoke Rate",
      "isSkipWaterfall": false,
      "baseRateCardID": "11jSB000002Bn13YAC",
      "tierRateCardID": "fgjjSB0sdf987dsf",
      "attributeRateCardID": "asdfgh563034lk"
    }
  ]
}
```

This example shows a sample response for the Invoke Rating Service action.

```
[
  {
    "actionName": "invokeRatingService",
    "errors": null,
    "isSuccess": true,
    "outputValues": {}
  }
]
```

CHAPTER 6 Product Configurator

In this chapter ...

- [Product Configurator Standard Objects](#)
- [Product Configurator Business APIs](#)
- [Product Configurator Standard Invocable Actions](#)
- [Product Configurator Metadata API Types](#)

Customize the components and attributes of a product to align with specific business requirements.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Unlimited, and Developer** Editions of Revenue Cloud where Product Configurator is enabled

Product Configurator Standard Objects

The Product Configurator data model provides objects and fields to manage the product configurator flow.

[ExpressionSetConstraintObj](#)

Represents the association between a Product object and the constraint model tags defined in a given constraint model. This object is available in API version 63.0 and later.

[ProductConfigurationFlow](#)

Specifies the many-to-many relationship between Product Classification, Product, and Flow Definition objects. The flow definition is used to configure standalone and bundled products of a specific product classification along with the product attributes, quantities, and product selling models. This object is available in API version 60.0 and later.

[ProductConfigFlowAssignment](#)

A junction object that represents the many-to-many relationship between Product Configuration Flow, Product, and Product Classification. This object is available in API version 60.0 and later.

[ProductConfigurationRule](#)

Represents the validation, inclusion, and exclusion rules for products in the context of the selling process. The selling process can be quoting, configuration, or ordering. This object is available in API version 61.0 and later.

SEE ALSO:

[Object Reference for the Salesforce Platform: Overview of Salesforce Objects and Fields](#)

[SOAP API Developer Guide: Introduction to SOAP API](#)

ExpressionSetConstraintObj

Represents the association between a Product object and the constraint model tags defined in a given constraint model. This object is available in API version 63.0 and later.

Supported Calls

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

Special Access Rules

This object is available in orgs where Revenue Cloud is enabled.

Fields

Field	Details
ConstraintModelTag	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description</p> <p>The product tag that is defined in the constraint model, for example, Laptop.</p>
ConstraintModelTagType	<p>Type</p> <p>picklist</p> <p>Properties</p> <p>Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description</p> <p>The type of the product tag that is defined in the constraint model.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Port • Type <p>The default value is Type.</p>
ExpressionSetId	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Create, Filter, Group, Sort, Update</p> <p>Description</p> <p>The expression set associated with the expression set constraint object.</p> <p>This field is a relationship field.</p> <p>Relationship Name</p> <p>ExpressionSet</p> <p>Refers To</p> <p>ExpressionSet</p>
LastReferencedDate	<p>Type</p> <p>dateTime</p> <p>Properties</p> <p>Filter, Nillable, Sort</p> <p>Description</p> <p>The timestamp when the current user last accessed this record, a record related to this record, or a list view.</p>
LastViewedDate	<p>Type</p> <p>dateTime</p> <p>Properties</p> <p>Filter, Nillable, Sort</p> <p>Description</p> <p>The timestamp when the current user last viewed this record or list view. If this value is null, the user accessed this record or list view (LastReferencedDate) but didn't view it.</p>

Field	Details
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the expression set constraint.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description For internal use only. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
ReferenceObjectId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The object associated with the expression set constraint object. This field is a polymorphic relationship field.</p> <p>Relationship Name ReferenceObject</p> <p>Refers To Product2, ProductClassification, ProductRelatedComponent</p>

ProductConfigurationFlow

Specifies the many-to-many relationship between Product Classification, Product, and Flow Definition objects. The flow definition is used to configure standalone and bundled products of a specific product classification along with the product attributes, quantities, and product selling models. 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
FlowIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Stores the flow API name.</p>
IsDefault	<p>Type Boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates the default configurator flow. The default value is <code>false</code>.</p>
Status	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Indicates the status of the product configuration flow. Possible values include Draft, Active, and Inactive Possible values are:</p> <ul style="list-style-type: none"> • Active • Draft • Inactive <p>The default value is <code>Draft</code>.</p>

ProductConfigFlowAssignment

A junction object that represents the many-to-many relationship between Product Configuration Flow, Product, and Product Classification. This object is available in API version 60.0 and later.

Supported Calls

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

Fields

Field	Details
AssignmentType	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies whether the Product Configuration Flow is assigned to the primary product or classification, or to dynamic components added within a bundle.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • DynamicAdditionFlow • PrimaryConfiguratorFlow <p>The default value is <code>PrimaryConfiguratorFlow</code>. Available in API version 65.0 and later.</p>
ProductClassificationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The product classification associated with the Product Configuration Flow.</p> <p>This field is a relationship field.</p> <p>Relationship Name ProductClassification</p> <p>Relationship Type Lookup</p> <p>Refers To ProductClassification</p>
ProductConfigurationFlowId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The Product Configuration Flow associated with the Product Classification or Product.</p> <p>This field is a relationship field.</p> <p>Relationship Name ProductConfigurationFlow</p> <p>Relationship Type Lookup</p>

Field	Details
	Refers To ProductConfigurationFlow
ProductId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The product associated with the Product Configuration Flow. This field is a relationship field.
	Relationship Name Product
	Relationship Type Lookup
	Refers To Product2

ProductConfigurationRule

Represents the validation, inclusion, and exclusion rules for products in the context of the selling process. The selling process can be quoting, configuration, or ordering. 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
ApiName	Type string
	Properties Filter, Group, Nillable, Sort
	Description
ConfigurationRuleDefinition	Type textarea
	Properties Create, Nillable, Update

Field	Details
	<p>Description The configuration rule criteria and actions.</p>
Description	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The description of the configuration rule.</p>
EffectiveFromDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date and time from which the configuration rules comes into effect.</p>
EffectiveToDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date and time to which the configuration rules ceases to be in effect.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date the configuration rule record was last referenced.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date the configuration rule record was last viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p>

Field	Details
	<p>Description The name of the configuration rule.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the configuraion rule owner. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
ProcessScope	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The scope of the configuration rule. Possible values are:</p> <ul style="list-style-type: none"> • Bundle • Product <p>The default value is <code>Product</code>.</p>
RuleSubType	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The segregation of products into subsets such that the configuration rules only apply to the products that fall under the ambit of the selected rule subtype. Possible values are:</p> <ul style="list-style-type: none"> • BundleProduct • BundleProductClassification • Product • ProductClassification

Field	Details
	The default value is <code>Product</code> .
<code>RuleType</code>	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Indicates the industry vertical or the feature of the industry vertical that's using the configuration rule.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • <code>Configurator</code> • <code>Promotions</code> <p>The default value is <code>Configurator</code>.</p>
<code>Sequence</code>	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Indicates the order for executing the configuration rule. Rules with lower numbers run first when multiple rules are triggered at once.</p>
<code>Status</code>	<p>Type picklist</p> <p>Properties Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description The lifecycle status of the configuration rule.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • <code>Active</code> • <code>Draft</code> • <code>Inactive</code> <p>The default value is <code>Draft</code>.</p>

Product Configurator Business APIs

Use the Product Configurator Business APIs to customize a product or a service according to your business-specific requirements.

Perform product configuration-related operations by using the Product Configurator Business APIs. Integrate these APIs with any front-end application to access the configurator capabilities.

This table lists the available Product Configurator resources.

Resource	Description
/connect/cpq/configurator/actions/configure (POST)	Retrieve and update a product's configuration from a configurator. Execute configuration rules and notify users of any violations for changes to product bundle, attributes, or product quantity within a bundle. Additionally, get pricing details for the configured bundle.
/connect/cpq/configurator/actions/load-instance (POST)	Create a session for the product configuration instance using the transaction ID. Get the session ID that includes the results of actions, such as configuration rules, qualification rules, and pricing management.
/connect/cpq/configurator/actions/set-instance (POST)	Set a product configuration instance. This API is used in scenarios where the configuration instance is available in a different database than Salesforce and the product catalog management data is in Salesforce.
/connect/cpq/configurator/actions/get-instance (POST)	Fetch the JSON representation of a product configuration. Use the response to display the details of the product configuration instance on the Salesforce user interface, or save the product configuration instance to an external system.
/connect/cpq/configurator/actions/save-instance (POST)	Save a configuration instance after a successful product configuration.
/connect/cpq/configurator/actions/set-product-quantity (POST)	Set the quantity of a product through the runtime system.
/connect/cpq/configurator/actions/add-nodes (POST)	Add a node to the context through the runtime system without using the Salesforce user interface.

Resource	Description
/connect/cpq/configurator/actions/update-nodes (POST)	Update nodes in a product configuration.
/connect/cpq/configurator/actions/delete-nodes (POST)	Delete nodes from a product configuration.

[Resources](#)

Learn more about the available Product Configurator API resources.

[Request Bodies](#)

Learn more about the available Product Configurator API request bodies.

[Response Bodies](#)

Learn more about the available Product Configurator API response bodies.

SEE ALSO:

[Connect REST API Developer Guide: Introduction](#)

[Salesforce Help: Product Configurator Permissions](#)

Resources

Learn more about the available Product Configurator API resources.

[Configuration \(POST\)](#)

Retrieve and update a product's configuration from a configurator. Execute configuration rules and notify users of any violations for changes to product bundle, attributes, or product quantity within a bundle. Additionally, get pricing details for the configured bundle.

[Saved Configuration \(GET, POST\)](#)

Save and reuse a record's configurations, and get a list of the saved configurations for a record.

[Saved Configuration \(DELETE, PUT\)](#)

Update or delete a record's saved configuration by using the configuration ID.

[Configuration Get Instance \(POST\)](#)

Fetch the JSON representation of a product configuration. Use the response to display the details of the product configuration instance on the Salesforce user interface, or save the product configuration instance to an external system.

[Configuration Load Instance \(POST\)](#)

Create a session for the product configuration instance using the transaction ID. Get the session ID that includes the results of actions, such as configuration rules, qualification rules, and pricing management.

[Configuration Save Instance \(POST\)](#)

Save a configuration instance after a successful product configuration.

[Configuration Set Instance \(POST\)](#)

Set a product configuration instance. This API is used in scenarios where the configuration instance is available in a different database than Salesforce and the product catalog management data is in Salesforce.

[Configurator Add Nodes \(POST\)](#)

Add a node to the context through the runtime system without using the Salesforce user interface.

[Configurator Delete Nodes \(POST\)](#)

Delete nodes from a product configuration.

[Configurator Update Nodes \(POST\)](#)

Update nodes in a product configuration.

[Product Set Quantity \(POST\)](#)

Set the quantity of a product through the runtime system.

Configuration (POST)

Retrieve and update a product's configuration from a configurator. Execute configuration rules and notify users of any violations for changes to product bundle, attributes, or product quantity within a bundle. Additionally, get pricing details for the configured bundle.

Resource

```
/connect/cpq/configurator/actions/configure
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/cpq/configurator/actions/configure
```

Available version

60.0

HTTP methods

POST

Request body for POST

JSON example

This example shows a sample to initiate a context based on a transaction ID.

```
{
  "transactionLineId": "0QLDE000000IBXw4AO",
  "transactionId": "0Q0xx0000000001GAA",
  "correlationId": "c95246d4-102c-4ecd-a263-f74ac525d1e5",
  "configuratorOptions": {
    "executePricing": true,
    "returnProductCatalogData": true
  },
  "qualificationContext": {
    "accountId": "001xx0000000001AAA",
    "contactId": "003xx000000000D7AAI"
  }
}
```

This example shows a sample to add, update, or delete a node in an existing context.

```
{
  "transactionLineId": "0QLDE000000IBXw4AO",
  "transactionId": "0Q0DE000000ISHJs81",
  "correlationId": "c95246d4-102c-4ecd-a263-f74ac525d1e5",
  "configuratorOptions": {
    "executePricing": true,
    "returnProductCatalogData": true,
    "qualifyAllProductsInTransaction": true,
  }
}
```

```

    "validateProductCatalog": true,
    "validateAmendRenewCancel": true,
    "executeConfigurationRules": true,
    "addDefaultConfiguration": true
  },
  "contextResponseType": "Full",
  "qualificationContext": {
    "accountId": "001xx0000000001AAA",
    "contactId": "003xx000000000D7AAI"
  },
  "transactionContextId": "008d27d7-e004-4906-a949-ee7d7c323c77",
  "addedNodes": [
    {
      "path": ["0Q0DE000000ISHJs81", "sti2_id"],
      "addedObject": {
        "id": "ref_sti2_id",
        "SalesTransactionSource": "sti2_id",
        "PricebookEntry": "01luxx0000000001AAA",
        "ProductSellingModel": "0jPxx0000000001AAA",
        "businessObjectType": "QuoteLineItem",
        "Quantity": 10,
        "UnitPrice": 2.0,
        "Product": "01txx0000000001AAA"
      }
    },
    {
      "path": ["0Q0DE000000ISHJs81", "0QLDE000000IBXw4AO", "ref_stir1_id"],
      "addedObject": {
        "id": "ref_stir1_id",
        "businessObjectType": "QuoteLineItemRelationship",
        "MainItem": "0QLDE000000IBXw4AO",
        "AssociatedItem": "ref_sti2_id",
        "ProductRelatedComponent": "0dSxx0000000001AAA",
        "ProductRelationshipType": "0yoxx0000000001AAA",
        "AssociatedItemPricing": "IncludedInBundlePrice"
      }
    }
  ],
  "updatedNodes": [
    {
      "path": ["0Q0DE000000ISHJs81", "0QLDE000000IBXw4AO"],
      "updatedAttributes": {
        "Quantity": 5
      }
    }
  ],
  "deletedNodes": [
    {
      "path": ["0Q0DE000000ISHJs81", "0QLDE000000IBXw4AO"]
    }
  ]
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
addedNodes	Configurator Added Node Input[]	List of added context nodes that's passed to the product configurator.	Optional	60.0
configuratorOptions	Configurator Options Input[]	Options to pass to the configurator.	Optional	60.0
contextResponseType	String	Specifies the type of transaction context response. Valid values are: <ul style="list-style-type: none"> <code>Delta</code>—Returns the sales transaction items that are added or updated. <code>Full</code>—Returns all sales transaction items in a transaction. <code>None</code>—Returns empty transaction context response. <code>Product</code>—Returns the sales transaction items related to the product that's being configured. 	Required for large sales transactions with more than 1000 line items and less than 15K line items.	65.0
correlationId	String	ID that's specified for traceability of logs.	Optional	60.0
deletedNodes	Configurator Deleted Node Input[]	List of deleted context nodes that's passed to the product configurator.	Optional	60.0
qualificationContext	User Context Input[]	Details such as account ID, contact ID, and context ID that are used for executing qualification rules.	Optional	60.0
transactionContextId	String	ID of the transaction context.	Optional	60.0
transactionId	String	ID of the sales transaction that's being configured such as a quote or an order.	Required	60.0
transactionLineId	String	ID of the top-level line item that's being configured.	Optional	60.0
updatedNodes	Configurator Updated Node Input[]	List of updated context nodes that's passed to the product configurator.	Optional	60.0

Response body for POST[Configuration Details](#)**Saved Configuration (GET, POST)**

Save and reuse a record's configurations, and get a list of the saved configurations for a record.

Resource

```
/connect/cpq/configurator/saved-configuration
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/cpq/configurator/saved-configuration
```

Available version

63.0

HTTP methods

GET, POST

Request parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
referenceRecordId	String	ID of the record whose saved configurations must be retrieved.	Required	63.0

Response body for GET[Configuration List](#)**Request body for POST****JSON example**

```
{
  "data":
  Built-in
  "description": "This configuration is saved for reuse.",
  "name": "Favorite Configuration",
  "referenceRecordId": "01txx0000006iCFAAY"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
data	String	JSON object that contains the details of the sales transaction, formatted as a string.	Optional	63.0
description	String	Description of the saved configuration.	Optional	63.0
name	String	Name of the saved configuration.	Optional	63.0
referenceRecordId	String	ID of the record for which the configuration must be saved.	Required	63.0

Response body for POST

[Configuration Record Save](#)

SEE ALSO:

[Salesforce Help: Considerations to Save and Reuse Configurations](#)

Saved Configuration (DELETE, PUT)

Update or delete a record's saved configuration by using the configuration ID.

Resource

```
/connect/cpq/configurator/saved-configuration/id
```

The *id* parameter is the ID of the configuration that you want to update or delete.

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/cpq/configurator/saved-configuration/5KPx0025063G3mSAX
```

Available version

63.0

HTTP methods

DELETE, PUT

Request body for PUT**JSON example**

```
{
  "data":
  Built-in
  "description": "This configuration is updated.",
```



```

    "name": "Updated Configuration"
  }

```

Properties

Name	Type	Description	Required or Optional	Available Version
data	String	JSON object that contains the details of the sales transaction, formatted as a string.	Required	63.0
description	String	Description of the configuration.	Required	63.0
name	String	Name of the configuration.	Required	63.0

Response body for PUT

[Configuration Update](#)

SEE ALSO:

[Salesforce Help: Considerations to Save and Reuse Configurations](#)

Configuration Get Instance (POST)

Fetch the JSON representation of a product configuration. Use the response to display the details of the product configuration instance on the Salesforce user interface, or save the product configuration instance to an external system.

Resource

```
/connect/cpq/configurator/actions/get-instance
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/cpq/configurator/actions/get-instance
```

Available version

60.0

HTTP methods

POST

Request body for POST

JSON example

```

{
  "contextId": "008d27d7-e004-4906-a949-ee7d7c323c77"
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
contextId	String	Transaction context ID of the product configuration instance that's to be fetched.	Required	60.0

Response body for POST

[Configuration Get Instance](#)

Configuration Load Instance (POST)

Create a session for the product configuration instance using the transaction ID. Get the session ID that includes the results of actions, such as configuration rules, qualification rules, and pricing management.

Resource

```
/connect/cpq/configurator/actions/load-instance
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/cpq/configurator/actions/load-instance
```

Available version

60.0

HTTP methods

POST

Request body for POST**JSON example**

```
{
  "configuratorOptions":
  {
    "addDefaultConfiguration": true,
    "executeConfigurationRules": true,
    "executePricing": true,
    "qualifyAllProductsInTransaction": true,
    "validateAmendRenewCancel": true,
    "validateProductCatalog": true
  },
  "qualificationContext": {
    "accountId": "001DU000001nHUGYA2"
  },
  "transactionId": "0Q0DU0000000XoN0AU"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
configurator Options	Configurator Options Input	List of the configurator options to execute.	Optional	60.0
context MappingId	String	ID of the context mapping record.	Optional	60.0
qualification Context	User Context Input	Context details that are used for the qualification rules.	Optional	60.0
transaction Id	String	Transaction ID of the header entity that's used to create a session. For example, a Quote or an Order.	Required	60.0

Response body for POST

[Configuration Load Instance](#)

Configuration Save Instance (POST)

Save a configuration instance after a successful product configuration.

Use the Configuration Save Instance API to save the changes to the source after a successful configuration. For example, save changes to the quote line item of a product, which is the source used to load the configuration.

Resource

```
/connect/cpq/configurator/actions/save-instance
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/cpq/configurator/actions/save-instance
```

Available version

60.0

HTTP methods

POST

Request body for POST**JSON example**

```
{
  "contextId": "008d27d7-e004-4906-a949-ee7d7c323c77"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
contextId	String	Transaction context ID of the product configuration instance that's to be saved.	Required	60.0

Response body for POST

[Configuration Save Instance](#)

Configuration Set Instance (POST)

Set a product configuration instance. This API is used in scenarios where the configuration instance is available in a different database than Salesforce and the product catalog management data is in Salesforce.

Resource

```
/connect/cpq/configurator/actions/set-instance
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/cpq/configurator/actions/set-instance
```

Available version

60.0

HTTP methods

POST

Request body for POST**JSON example**

```
{
  "configuratorOptions": {
    "addDefaultConfiguration": true,
    "executeConfigurationRules": true,
    "executePricing": false,
    "qualifyAllProductsInTransaction": false,
    "validateAmendRenewCancel": false,
    "validateProductCatalog": false
  },
  "contextMappingId": "11jEk000017YdyUIAS",
  "qualificationContext": {
    "accountId": "001DU000001nHUGYA2"
  },
  "transaction":
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
configuratorOptions	Configurator Options Input	List of the configurator options to execute.	Optional	60.0
contextMappingId	String	ID of the context mapping record.	Required	60.0
qualificationContext	User Context Input	Context details that are used for the qualification rules.	Optional	60.0
transaction	String	Transaction JSON payload representing an object in an external system that's used to create a session.	Required	60.0

Response body for POST

[Configuration Set Instance](#)

Configurator Add Nodes (POST)

Add a node to the context through the runtime system without using the Salesforce user interface.

Resource

```
/connect/cpq/configurator/actions/add-nodes
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/cpq/configurator/actions/add-nodes
```

Available version

60.0

HTTP methods

POST

Request body for POST**JSON example**

```
{
  "configuratorOptions": {
    "executePricing": true,
    "returnProductCatalogData": true,
    "qualifyAllProductsInTransaction": true,
    "validateProductCatalog": true,
    "validateAmendRenewCancel": true,
    "executeConfigurationRules": true,
    "addDefaultConfiguration": true
  },
  "qualificationContext": {
    "accountId": "001xx0000000001AAA",

```

```

    "contactId": "003xx00000000D7AAI"
  },
  "contextId": "008d27d7-e004-4906-a949-ee7d7c323c77",
  "addedNodes": [
    {
      "path": [
        "0Q0xx0000004EvcCAE",
        "ref_d3a3f8d2_e031_4517_ae28_69ce16cb6589"
      ],
      "addedObject": {
        "id": "ref_d3a3f8d2_e031_4517_ae28_69ce16cb6589",
        "SalesTransactionItemSource": "ref_d3a3f8d2_e031_4517_ae28_69ce16cb6589",
        "SalesTransactionItemParent": "0Q0xx0000004EvcCAE",
        "PricebookEntry": "01luxx00000090VuAAI",
        "ProductSellingModel": "0jPxx00000001KHEAY",
        "UnitPrice": 15.26,
        "Quantity": 1,
        "Product": "01ttxx00000061fHAAQ",
        "businessObjectType": "QuoteLineItem"
      }
    },
    {
      "path": [
        "0Q0xx0000004EvcCAE",
        "ref_d3a3f8d2_e031_4517_ae28_69ce16cb6589",
        "ref_d85b036d_d305_4bb6_aba8_aldff645a664"
      ],
      "addedObject": {
        "id": "ref_d85b036d_d305_4bb6_aba8_aldff645a664",
        "MainItem": "0QLxx0000004QdRGAU",
        "AssociatedItem": "ref_d3a3f8d2_e031_4517_ae28_69ce16cb6589",
        "ProductRelatedComponent": "0dSxx00000001p6EAA",
        "ProductRelationshipType": null,
        "AssociatedItemPricing": "NotIncludedInBundlePrice",
        "AssociatedQuantScaleMethod": "Proportional",
        "businessObjectType": "QuoteLineRelationship"
      }
    }
  ]
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
addedNodes	Configurator Added Node Input[]	List of the nodes to be added.	Required	60.0
configuratorOptions	Configurator Options Input	List of the configuration options to execute.	Optional	60.0
contextId	String	ID of the context object that's being considered.	Required	60.0

Name	Type	Description	Required or Optional	Available Version
qualification Context	User Context Input	Context details that are used for the qualification rules.	Optional	60.0

Response body for POST[Configurator Add Nodes](#)

Configurator Delete Nodes (POST)

Delete nodes from a product configuration.

Resource`/connect/cpq/configurator/actions/delete-nodes`**Resource example**`https://yourInstance.salesforce.com/services/data/v65.0/connect/cpq/configurator/actions/delete-nodes`**Available version**

60.0

HTTP methods

POST

Request body for POST**JSON example**

```
{
  "configuratorOptions": {
    "executePricing": true,
    "returnProductCatalogData": true,
    "qualifyAllProductsInTransaction": true,
    "validateProductCatalog": true,
    "validateAmendRenewCancel": true,
    "executeConfigurationRules": true,
    "addDefaultConfiguration": true
  },
  "qualificationContext": {
    "accountId": "001xx0000000001AAA",
    "contactId": "003xx000000000D7AAI"
  },
  "contextId": "008d27d7-e004-4906-a949-ee7d7c323c77",
  "deletedNodes": [
    {
      "path": ["0Q0DE0000000ISHJs81", "0QLDE0000000IBXw4AO"]
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
configuratorOptions	Configurator Options Input	List of the configuration options to execute.	Optional	60.0
contextId	String	ID of the context object that's being considered.	Required	60.0
deletedNodes	Configurator Deleted Node Input[]	List of the nodes to be deleted.	Required	60.0
qualificationContext	User Context Input	Context details that are used for the qualification rules.	Optional	60.0

Response body for POST[Configurator Delete Nodes](#)

Configurator Update Nodes (POST)

Update nodes in a product configuration.

Resource`/connect/cpq/configurator/actions/update-nodes`**Resource example**`https://yourInstance.salesforce.com/services/data/v65.0/connect/cpq/configurator/actions/update-nodes`**Available version**

60.0

HTTP methods

POST

Request body for POST**JSON example**

```
{
  "configuratorOptions": {
    "executePricing": true,
    "returnProductCatalogData": true,
    "qualifyAllProductsInTransaction": true,
    "validateProductCatalog": true,
    "validateAmendRenewCancel": true,
    "executeConfigurationRules": true,
    "addDefaultConfiguration": true
  },
  "qualificationContext": {
    "accountId": "001xx0000000001AAA",

```



```

    "contactId": "003xx00000000D7AAI"
  },
  "contextId": "008d27d7-e004-4906-a949-ee7d7c323c77",
  "updatedNodes": [
    {
      "path": ["0Q0DE000000ISHJs81", "0QLDE000000IBXw4AO"],
      "updatedAttributes": {
        "Quantity": 5
      }
    }
  ]
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
configurator Options	Configurator Options Input	List of the configuration options to execute.	Optional	60.0
contextId	String	ID of the context object that's being considered.	Required	60.0
qualification Context	User Context Input	Context details that are used for the qualification rules.	Optional	60.0
updatedNodes	Configurator Updated Node Input[]	List of the nodes to be updated.	Required	60.0

Response body for POST

[Configurator Update Nodes](#)

Product Set Quantity (POST)

Set the quantity of a product through the runtime system.

Resource

```
/connect/cpq/configurator/actions/set-product-quantity
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/cpq/configurator/actions/set-product-quantity
```

Available version

60.0

HTTP methods

POST

Request body for POST**JSON example**

```
{
  "configuratorOptions": {
    "executePricing": true,
    "returnProductCatalogData": true,
    "qualifyAllProductsInTransaction": true,
    "validateProductCatalog": true,
    "validateAmendRenewCancel": true,
    "executeConfigurationRules": true,
    "addDefaultConfiguration": true
  },
  "qualificationContext": {
    "accountId": "001xx0000000001AAA",
    "contactId": "003xx000000000D7AAI"
  },
  "contextId": "008d27d7-e004-4906-a949-ee7d7c323c77",
  "quantity": 20,
  "transactionLinePath": "Quote.QuoteLineItem.Quantity"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
configuratorOptions	Configurator Options Input	List of the configuration options to execute.	Optional	60.0
contextId	String	ID of the context object that's being considered.	Required	60.0
qualificationContext	User Context Input	Context details that are used for the qualification rules.	Optional	60.0
quantity	Integer	Value of the product quantity.	Required	60.0
transactionLinePath	String[]	Path to the line item where the update to the quantity is applied. For example, Quote.QuoteLineItem.Quantity.	Required	60.0

Response body for POST

[Product Quantity Set Configurator](#)

Request Bodies

Learn more about the available Product Configurator API request bodies.

[Configuration Get Instance Input](#)

Input representation of the request to get a product configuration instance.

[Configuration Load Instance Input](#)

Input representation of the request to load a product configuration instance.

[Configuration Save Input](#)

Input representation of the details to save a configuration.

[Configuration Update Input](#)

Input representation of the details to update a configuration.

[Configuration Save Instance Input](#)

Input representation of the request to save a product configuration instance.

[Configuration Set Instance Input](#)

Input representation of the request to set a product configuration instance.

[Configurator Add Nodes Input](#)

Input representation of the request to add nodes within a root node.

[Configurator Added Node Input](#)

Input representation of the nodes to be added to a product configuration.

[Configurator Delete Nodes Input](#)

Input representation of the request to delete nodes from a product configuration.

[Configurator Deleted Node Input](#)

Input representation of the nodes to be deleted from a product configuration.

[Configurator Input](#)

Input representation of the request to modify the product configuration.

[Configurator Options Input](#)

Input representation of the request to get the product configuration options that's passed to the configurator.

[Configurator Update Nodes Input](#)

Input representation of the request to update the nodes in a product configuration.

[Configurator Updated Node Input](#)

Input representation of the nodes to be updated in a product configuration.

[Product Quantity Set Configurator Input](#)

Input representation of the request to set the quantity of a product.

[User Context Input](#)

Input representation of the request to get the context details of a user, which are used for qualification rules.

Configuration Get Instance Input

Input representation of the request to get a product configuration instance.

JSON example

```
{
  "contextId": "008d27d7-e004-4906-a949-ee7d7c323c77"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
contextId	String	Transaction context ID of the product configuration instance that's to be fetched.	Required	60.0

Configuration Load Instance Input

Input representation of the request to load a product configuration instance.

JSON example

```
{
  "configuratorOptions":
    {
      "addDefaultConfiguration": true,
      "executeConfigurationRules": true,
      "executePricing": true,
      "qualifyAllProductsInTransaction": true,
      "validateAmendRenewCancel": true,
      "validateProductCatalog": true
    },
  "qualificationContext": {
    "accountId": "001DU000001nHUGYA2"
  },
  "transactionId": "0Q0DU0000000XoN0AU"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
configurator Options	Configurator Options Input	List of the configurator options to execute.	Optional	60.0
context MappingId	String	ID of the context mapping record.	Optional	60.0
qualification Context	User Context Input	Context details that are used for the qualification rules.	Optional	60.0
transactionId	String	Transaction ID of the header entity that's used to create a session. For example, a Quote or an Order.	Required	60.0

Configuration Save Input

Input representation of the details to save a configuration.

JSON example

```

{
  "data":
  Built-in
  "description": "This configuration is saved for reuse.",
  "name": "Favorite Configuration",
  "referenceRecordId": "01txx0000006iCFAAY"
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
data	String	JSON object that contains the details of the sales transaction, formatted as a string.	Optional	63.0
description	String	Description of the saved configuration.	Optional	63.0
name	String	Name of the saved configuration.	Optional	63.0
referenceRecordId	String	ID of the record for which the configuration must be saved.	Required	63.0

Configuration Update Input

Input representation of the details to update a configuration.

JSON example

```

{
  "data":
  Built-in
  "description": "This configuration is updated.",
  "name": "Updated Configuration"
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
data	String	JSON object that contains the details of the sales transaction, formatted as a string.	Required	63.0

Name	Type	Description	Required or Optional	Available Version
description	String	Description of the configuration.	Required	63.0
name	String	Name of the configuration.	Required	63.0

Configuration Save Instance Input

Input representation of the request to save a product configuration instance.

JSON example

```
{
  "contextId": "008d27d7-e004-4906-a949-ee7d7c323c77"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
contextId	String	Transaction context ID of the product configuration instance that's to be saved.	Required	60.0

Configuration Set Instance Input

Input representation of the request to set a product configuration instance.

JSON example

```
{
  "configuratorOptions": {
    "addDefaultConfiguration": true,
    "executeConfigurationRules": true,
    "executePricing": false,
    "qualifyAllProductsInTransaction": false,
    "validateAmendRenewCancel": false,
    "validateProductCatalog": false
  },
  "contextMappingId": "11jEk000017YdyUIAS",
  "qualificationContext": {
    "accountId": "001DU000001nHUGYA2"
  },
  "transaction":
  "001DU000001nHUGYA2"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
configurator Options	Configurator Options Input	List of the configurator options to execute.	Optional	60.0
context MappingId	String	ID of the context mapping record.	Required	60.0
qualification Context	User Context Input	Context details that are used for the qualification rules.	Optional	60.0
transaction	String	Transaction JSON payload representing an object in an external system that's used to create a session.	Required	60.0

Configurator Add Nodes Input

Input representation of the request to add nodes within a root node.

JSON example

```
{
  "configuratorOptions": {
    "executePricing": true,
    "returnProductCatalogData": true,
    "qualifyAllProductsInTransaction": true,
    "validateProductCatalog": true,
    "validateAmendRenewCancel": true,
    "executeConfigurationRules": true,
    "addDefaultConfiguration": true
  },
  "qualificationContext": {
    "accountId": "001xx0000000001AAA",
    "contactId": "003xx000000000D7AAI"
  },
  "contextId": "008d27d7-e004-4906-a949-ee7d7c323c77",
  "addedNodes": [
    {
      "path": [
        "0Q0xx0000004EvcCAE",
        "ref_d3a3f8d2_e031_4517_ae28_69ce16cb6589"
      ],
      "addedObject": {
        "id": "ref_d3a3f8d2_e031_4517_ae28_69ce16cb6589",
        "SalesTransactionItemSource": "ref_d3a3f8d2_e031_4517_ae28_69ce16cb6589",
        "SalesTransactionItemParent": "0Q0xx0000004EvcCAE",
        "PricebookEntry": "01luxx00000090VuAAI",
        "ProductSellingModel": "0jPxx00000001KHEAY",
        "UnitPrice": 15.26,
        "Quantity": 1,
        "Product": "01txx00000061fHAAQ",

```

```

        "businessObjectType": "QuoteLineItem"
    }
},
{
    "path": [
        "0Q0xx0000004EvcCAE",
        "ref_d3a3f8d2_e031_4517_ae28_69ce16cb6589",
        "ref_d85b036d_d305_4bb6_aba8_a1dff645a664"
    ],
    "addedObject": {
        "id": "ref_d85b036d_d305_4bb6_aba8_a1dff645a664",
        "MainItem": "0QLxx0000004QdRGAU",
        "AssociatedItem": "ref_d3a3f8d2_e031_4517_ae28_69ce16cb6589",
        "ProductRelatedComponent": "0dSxx00000001p6EAA",
        "ProductRelationshipType": null,
        "AssociatedItemPricing": "NotIncludedInBundlePrice",
        "AssociatedQuantScaleMethod": "Proportional",
        "businessObjectType": "QuoteLineRelationship"
    }
}
]
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
addedNodes	Configurator Added Node Input[]	List of the nodes to be added.	Required	60.0
configurator Options	Configurator Options Input	List of the configuration options to execute.	Optional	60.0
contextId	String	ID of the context object that's being considered.	Required	60.0
qualification Context	User Context Input	Context details that are used for the qualification rules.	Optional	60.0

Configurator Added Node Input

Input representation of the nodes to be added to a product configuration.

JSON example

```

{
  "addedNodes": [
    {
      "path": [
        "0Q0xx0000004EvcCAE",
        "ref_d3a3f8d2_e031_4517_ae28_69ce16cb6589"
      ],
      "addedObject": {

```



```

    "id": "ref_d3a3f8d2_e031_4517_ae28_69ce16cb6589",
    "SalesTransactionItemSource": "ref_d3a3f8d2_e031_4517_ae28_69ce16cb6589",
    "SalesTransactionItemParent": "0Q0xx0000004EvcCAE",
    "PricebookEntry": "0luxx00000090VuAAI",
    "ProductSellingModel": "0jPxx00000001KHEAY",
    "UnitPrice": 15.26,
    "Quantity": 1,
    "Product": "0ltxx00000061fHAAQ",
    "businessObjectType": "QuoteLineItem"
  }
},
{
  "path": [
    "0Q0xx0000004EvcCAE",
    "ref_d3a3f8d2_e031_4517_ae28_69ce16cb6589",
    "ref_d85b036d_d305_4bb6_aba8_aldff645a664"
  ],
  "addedObject": {
    "id": "ref_d85b036d_d305_4bb6_aba8_aldff645a664",
    "MainItem": "0QLxx0000004QdRGAU",
    "AssociatedItem": "ref_d3a3f8d2_e031_4517_ae28_69ce16cb6589",
    "ProductRelatedComponent": "0dSxx00000001p6EAA",
    "ProductRelationshipType": null,
    "AssociatedItemPricing": "NotIncludedInBundlePrice",
    "AssociatedQuantScaleMethod": "Proportional",
    "businessObjectType": "QuoteLineRelationship"
  }
}
]
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
addedObject	Map<String, Object>	Details of the object that's being added. This property supports fields of objects from the Sales Transaction context definition, including custom objects and fields in your extended context definition.	Required	60.0
path	String[]	Path to the node that's being added. The path includes the unique ID of the context node in the data structure. This ID must match the ID of the sales transaction item source such as a quote line or an order line item. Keep these considerations in mind when setting the path value. <ul style="list-style-type: none"> If the businessObjectType property value is QuoteLineItem, 	Required	60.0

Name	Type	Description	Required or Optional	Available Version
		<p>the path must contain 2 IDs. The first ID is the quote ID, and the second ID is the quote line item ID.</p> <ul style="list-style-type: none"> If the <code>businessObjectType</code> property value is <code>QuoteLineItem</code>, the path must contain <code>SalesTransactionItemSource</code> and <code>SalesTransactionItemParent</code>. If the <code>businessObjectType</code> property value is <code>QuoteLineItemRelationship</code>, the path must contain 3 IDs. The first ID is the quote ID. The second ID is the quote line item ID. The third ID is the quote line item relationship ID. 		

Configurator Delete Nodes Input

Input representation of the request to delete nodes from a product configuration.

JSON example

```
{
  "configuratorOptions": {
    "executePricing": true,
    "returnProductCatalogData": true,
    "qualifyAllProductsInTransaction": true,
    "validateProductCatalog": true,
    "validateAmendRenewCancel": true,
    "executeConfigurationRules": true,
    "addDefaultConfiguration": true
  },
  "qualificationContext": {
    "accountId": "001xx0000000001AAA",
    "contactId": "003xx000000000D7AAI"
  },
  "contextId": "008d27d7-e004-4906-a949-ee7d7c323c77",
  "deletedNodes": [
    {
      "path": ["0Q0DE000000ISHJs81", "0QLDE000000IBXw4AO"]
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
configuratorOptions	Configurator Options Input	List of the configuration options to execute.	Optional	60.0
contextId	String	ID of the context object that's being considered.	Required	60.0
deletedNodes	Configurator Deleted Node Input[]	List of the nodes to be deleted.	Required	60.0
qualificationContext	User Context Input	Context details that are used for the qualification rules.	Optional	60.0

Configurator Deleted Node Input

Input representation of the nodes to be deleted from a product configuration.

JSON example

```

"deletedNodes": [
  {
    "path": ["0Q0DE000000ISHJs81", "0QLDE000000IBXw4AO"]
  }
]

```

Properties

Name	Type	Description	Required or Optional	Available Version
path	String[]	Path to the node that's being deleted.	Required	60.0

Configurator Input

Input representation of the request to modify the product configuration.

JSON example

This example shows a sample to initiate a context based on a transaction ID.

```

{
  "transactionLineId": "0QLDE000000IBXw4AO",
  "transactionId": "0Q0xx0000000001GAA",
  "correlationId": "c95246d4-102c-4ecd-a263-f74ac525d1e5",
  "configuratorOptions": {
    "executePricing": true,
    "returnProductCatalogData": true
  },
}

```

```

    "qualificationContext": {
      "accountId": "001xx0000000001AAA",
      "contactId": "003xx000000000D7AAI"
    }
  }
}

```

This example shows a sample to add, update, or delete a node in an existing context.

```

{
  "transactionLineId": "0QLDE000000IBXw4AO",
  "transactionId": "0Q0DE000000ISHJs81",
  "correlationId": "c95246d4-102c-4ecd-a263-f74ac525d1e5",
  "configuratorOptions": {
    "executePricing": true,
    "returnProductCatalogData": true,
    "qualifyAllProductsInTransaction": true,
    "validateProductCatalog": true,
    "validateAmendRenewCancel": true,
    "executeConfigurationRules": true,
    "addDefaultConfiguration": true
  },
  "contextResponseType": "Full",
  "qualificationContext": {
    "accountId": "001xx0000000001AAA",
    "contactId": "003xx000000000D7AAI"
  },
  "transactionContextId": "008d27d7-e004-4906-a949-ee7d7c323c77",
  "addedNodes": [
    {
      "path": ["0Q0DE000000ISHJs81", "sti2_id"],
      "addedObject": {
        "id": "ref_sti2_id",
        "SalesTransactionSource": "sti2_id",
        "PricebookEntry": "01uxx0000000001AAA",
        "ProductSellingModel": "0jPxx0000000001AAA",
        "businessObjectType": "QuoteLineItem",
        "Quantity": 10,
        "UnitPrice": 2.0,
        "Product": "01txx0000000001AAA"
      }
    },
    {
      "path": ["0Q0DE000000ISHJs81", "0QLDE000000IBXw4AO", "ref_stir1_id"],
      "addedObject": {
        "id": "ref_stir1_id",
        "businessObjectType": "QuoteLineItemRelationship",
        "MainItem": "0QLDE000000IBXw4AO",
        "AssociatedItem": "ref_sti2_id",
        "ProductRelatedComponent": "0dSxx0000000001AAA",
        "ProductRelationshipType": "0yoxx0000000001AAA",
        "AssociatedItemPricing": "IncludedInBundlePrice"
      }
    }
  ],
}

```

```

    "updatedNodes": [
      {
        "path": ["0Q0DE000000ISHJs81", "0QLDE000000IBXw4AO"],
        "updatedAttributes": {
          "Quantity": 5
        }
      }
    ],
    "deletedNodes": [
      {
        "path": ["0Q0DE000000ISHJs81", "0QLDE000000IBXw4AO"]
      }
    ]
  }

```

Properties

Name	Type	Description	Required or Optional	Available Version
addedNodes	Configurator Added Node Input[]	List of added context nodes that's passed to the product configurator.	Optional	60.0
configurator Options	Configurator Options Input[]	Options to pass to the configurator.	Optional	60.0
context ResponseType	String	Specifies the type of transaction context response. Valid values are: <ul style="list-style-type: none"> • Delta—Returns the sales transaction items that are added or updated. • Full—Returns all sales transaction items in a transaction. • None—Returns empty transaction context response. • Product—Returns the sales transaction items related to the product that's being configured. 	Required for large sales transactions with more than 1000 line items and less than 15K line items.	65.0
correlationId	String	ID that's specified for traceability of logs.	Optional	60.0
deletedNodes	Configurator Deleted Node Input[]	List of deleted context nodes that's passed to the product configurator.	Optional	60.0
qualification Context	User Context Input[]	Details such as account ID, contact ID, and context ID that are used for executing qualification rules.	Optional	60.0
transaction ContextId	String	ID of the transaction context.	Optional	60.0

Name	Type	Description	Required or Optional	Available Version
transactionId	String	ID of the sales transaction that's being configured such as a quote or an order.	Required	60.0
transactionLineId	String	ID of the top-level line item that's being configured.	Optional	60.0
updatedNodes	Configurator Updated Node Input[]	List of updated context nodes that's passed to the product configurator.	Optional	60.0

SEE ALSO:

[Salesforce Help: Context Service](#)

[Developer Documentation: Context Service](#)

Configurator Options Input

Input representation of the request to get the product configuration options that's passed to the configurator.

JSON example

```

"configuratorOptions":
  {
    "addDefaultConfiguration": true,
    "executeConfigurationRules": true,
    "executePricing": true,
    "qualifyAllProductsInTransaction": true,
    "validateAmendRenewCancel": true,
    "validateProductCatalog": true
  }

```

Properties

Name	Type	Description	Required or Optional	Available Version
addDefaultConfiguration	Boolean	Indicates whether to add the default configurations (<code>true</code>) or not (<code>false</code>).	Optional	60.0
executeConfigurationRules	Boolean	Indicates whether to execute the configuration rules (<code>true</code>) or not (<code>false</code>).	Optional	60.0
executePricing	Boolean	Indicates whether to execute pricing (<code>true</code>) or not (<code>false</code>).	Optional	60.0
pricingProcedure	String	Name of the pricing procedure to use during the API calls to Salesforce Pricing Management.	Optional	60.0

Name	Type	Description	Required or Optional	Available Version
qualifyAllProductsInTransaction	Boolean	Indicates whether to run the qualification rules on all the products in the context (<code>true</code>) or not (<code>false</code>).	Optional	60.0
returnProductCatalogData	Boolean	Indicates whether to return the product catalog data (<code>true</code>) or not (<code>false</code>). Exclude this property or specify the property value as <code>false</code> if you're using the API without the Product Configurator UI.	Optional	60.0
validateAmendRenewCancel	Boolean	Indicates whether to run the amend, renew, cancel-related validations (<code>true</code>) or not (<code>false</code>).	Optional	60.0
validateProductCatalog	Boolean	Indicates whether to run the validations against the product catalog (<code>true</code>) or not (<code>false</code>).	Optional	60.0

Configurator Update Nodes Input

Input representation of the request to update the nodes in a product configuration.

JSON example

```
{
  "configuratorOptions": {
    "executePricing": true,
    "returnProductCatalogData": true,
    "qualifyAllProductsInTransaction": true,
    "validateProductCatalog": true,
    "validateAmendRenewCancel": true,
    "executeConfigurationRules": true,
    "addDefaultConfiguration": true
  },
  "qualificationContext": {
    "accountId": "001xx0000000001AAA",
    "contactId": "003xx000000000D7AAI"
  },
  "contextId": "008d27d7-e004-4906-a949-ee7d7c323c77",
  "updatedNodes": [
    {
      "path": ["0Q0DE000000ISHJs81", "0QLDE000000IBXw4AO"],
      "updatedAttributes": {
        "Quantity": 5
      }
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
configurator Options	Configurator Options Input	List of the configuration options to execute.	Optional	60.0
contextId	String	ID of the context object that's being considered.	Required	60.0
qualification Context	User Context Input	Context details that are used for the qualification rules.	Optional	60.0
updatedNodes	Configurator Updated Node Input[]	List of the nodes to be updated.	Required	60.0

Configurator Updated Node Input

Input representation of the nodes to be updated in a product configuration.

JSON example

```

"updatedNodes": [
  {
    "path": ["0Q0DE000000ISHJs81", "0QLDE000000IBXw4AO"],
    "updatedAttributes": {
      "Quantity": 5
    }
  }
]

```

Properties

Name	Type	Description	Required or Optional	Available Version
path	String[]	Path to the node that's being updated.	Required	60.0
updated Attributes	Map<String, Object>	Details of the object that's being updated. This property supports fields of objects from the Sales Transaction context definition, including custom objects and fields in your extended context definition.	Required	60.0

Product Quantity Set Configurator Input

Input representation of the request to set the quantity of a product.

JSON example

```
{
  "configuratorOptions": {
    "executePricing": true,
    "returnProductCatalogData": true,
    "qualifyAllProductsInTransaction": true,
    "validateProductCatalog": true,
    "validateAmendRenewCancel": true,
    "executeConfigurationRules": true,
    "addDefaultConfiguration": true
  },
  "qualificationContext": {
    "accountId": "001xx0000000001AAA",
    "contactId": "003xx000000000D7AAI"
  },
  "contextId": "008d27d7-e004-4906-a949-ee7d7c323c77",
  "quantity": 20,
  "transactionLinePath": "Quote.QuoteLineItem.Quantity"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
configuratorOptions	Configurator Options Input	List of the configuration options to execute.	Optional	60.0
contextId	String	ID of the context object that's being considered.	Required	60.0
qualificationContext	User Context Input	Context details that are used for the qualification rules.	Optional	60.0
quantity	Integer	Value of the product quantity.	Required	60.0
transactionLinePath	String[]	Path to the line item where the update to the quantity is applied. For example, Quote.QuoteLineItem.Quantity.	Required	60.0

User Context Input

Input representation of the request to get the context details of a user, which are used for qualification rules.

JSON example

```
"qualificationContext": {
  "accountId": "001DU000001nHUGYA2",
  "contactId": "003xx000000000D7AAI"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
accountId	String	ID of the account in a user context.	Optional	60.0
contactId	String	ID of the contact in a user context.	Optional	60.0
contextId	String	ID of the context that represents the created session.	Optional	60.0

Response Bodies

Learn more about the available Product Configurator API response bodies.

[Configuration Details](#)

Output representation of the product configuration details.

[Configuration Get Instance](#)

Output representation of the request to retrieve the configuration instance.

[Configuration Load Instance](#)

Output representation of the details of the context or session that are returned with a load configuration request.

[Configuration Save Details](#)

Output representation of the details of a saved configuration.

[Configuration Record Save](#)

Output representation of the details of a saved configuration.

[Configuration List](#)

Output representation of the details of the saved configuration.

[Configuration Save Instance](#)

Output representation of the response that's returned with a save configuration request.

[Configuration Set Instance](#)

Output representation of the details of the context or session that are returned with a set configuration request.

[Configurator Add Nodes](#)

Output representation of the configuration request details to add nodes.

[Configurator Additional Fields](#)

Output representation of the additional fields of a product configuration.

[Configurator Attribute](#)

Output representation of the attribute in a product configuration.

[Configurator Attribute Category](#)

Output representation of the attribute category in a product configuration.

[Configurator Attribute Picklist](#)

Output representation of the attribute picklist in a product configuration.

[Configurator Attribute Picklist Value](#)

Output representation of the values of an attribute picklist in a product configuration.

[Configurator Delete Nodes](#)

Output representation of the details of the configuration request to delete nodes.

[Configurator Message](#)

Output representation of the messages of a product configurator.

[Configurator Price](#)

Output representation of the pricing details in a product configuration.

[Configurator Pricing Model](#)

Output representation of the details of a pricing model in a product configuration.

[Configurator Product Catalog](#)

Output representation of the product catalog.

[Configurator Product Classification](#)

Output representation of the product classification in a product configuration.

[Configurator Product Component Group](#)

Output representation of the product component group in a product classification.

[Configurator Product Recommendations](#)

Output representation of the details of the product recommendations.

[Configurator Product Related Component](#)

Output representation of the product related component in a product configuration.

[Configurator Product Selling Model](#)

Output representation of the product selling model in a product configuration.

[Configurator Product Selling Model Option](#)

Output representation of the product selling model option in a product configuration.

[Configurator Qualification Context](#)

Output representation of the qualification context in a product configuration.

[Configurator UI Treatment](#)

Output representation of the details of the UI treatments of a product configurator. The details include the product configuration rule actions to override the disable or hide behavior in the UI for product options, product attributes, and attribute picklist values.

[Configurator Unit Of Measure](#)

Output representation of the details of the unit of measure record.

[Configurator Update Nodes](#)

Output representation of the configuration request details to update nodes.

[Configuration Update](#)

Output representation of the details of the updated configuration.

[Error Response](#)

Output representation of the details of the error.

[Product Quantity Set Configurator](#)

Output representation of the request details to set product quantity.

Configuration Details

Output representation of the product configuration details.

JSON example

```
{
  "catalogProducts": {
    "additionalFields": [],
    "attributeCategories": [
      {
        "attributes": [
          {
            "attributeCategoryId": "0v3xx000000001AAA",
            "attributeNameOverride": "Load Capacity",
            "code": "CAP",
            "dataType": "NUMBER",
            "defaultValue": "1500",
            "description": "Server racks are designed to support a specific load capacity, commonly measured in kilograms (kg) or pounds (lbs). Typical load capacities range from 500 kg (1102 lbs) to 1500 kg (3307 lbs) depending on the model.",
            "id": "0tjxx00000001DpAAI",
            "isCloneable": false,
            "isConfigurable": true,
            "isHidden": false,
            "isPriceImpacting": false,
            "isReadOnly": false,
            "isRequired": false,
            "label": "Load Capacity",
            "name": "Load Capacity"
          },
          {
            "attributeCategoryId": "0v3xx000000001AAA",
            "attributeNameOverride": "Expansion Slots",
            "code": "SLOTCAP",
            "dataType": "NUMBER",
            "defaultValue": "12",
            "id": "0tjxx00000001H3AAI",
            "isCloneable": false,
            "isConfigurable": true,
            "isHidden": false,
            "isPriceImpacting": false,
            "isReadOnly": false,
            "isRequired": true,
            "label": "Expansion Slots",
            "name": "Expansion Slots"
          },
          {
            "attributeCategoryId": "0v3xx000000001AAA",
            "attributeNameOverride": "Memory",
            "attributePicklist": {
              "id": "0v5xx000000001AAA",
              "values": [
                {
                  "code": "MEM",
```

```

        "displayValue": "25",
        "id": "0v6xx000000001AAA",
        "isBooleanValue": false,
        "name": "25Mem",
        "sequence": 0,
        "textValue": "25"
    },
    {
        "code": "50MEM",
        "displayValue": "50",
        "id": "0v6xx000000001eAAA",
        "isBooleanValue": false,
        "name": "50Mem",
        "sequence": 1,
        "textValue": "50"
    },
    {
        "code": "100MEM",
        "displayValue": "100",
        "id": "0v6xx000000003FAAQ",
        "isBooleanValue": false,
        "name": "100Mem",
        "sequence": 2,
        "textValue": "100"
    }
]
},
"dataType": "MULTIPICKLIST",
"defaultValue": "25",
"id": "0tjxx00000001IfAAI",
"isCloneable": false,
"isConfigurable": true,
"isHidden": false,
"isPriceImpacting": false,
"isReadOnly": false,
"isRequired": true,
"label": "Memory",
"name": "Memory"
}
],
"code": "SPEC",
"name": "Server Rack Specifications"
}
],
"description": "Introducing the Cisco Server Rack, a sleek and robust solution designed to streamline your data center infrastructure. With its scalable design and advanced cable management features, it ensures optimal performance, efficiency, and easy maintenance for your critical network equipment.",
"displayUrl":
"https://www.cisco.com/content/dam/en/us/products/servers-unified-computing/ucs-c240-m4-rack-server/product-large.jpg",
"id": "01txx0000006jkuAAA",
"isActive": true,
"isAssetizable": true,

```

```

    "isConfigurable": true,
    "isSoldOnlyWithOtherProds": false,
    "name": "Cisco Server Rack NX44",
    "nodeType": "bundleProduct",
    "prices": [],
    "productClassification": {
      "id": "11Bxx000002CC02EAG"
    },
    "productCode": "RACK",
    "productComponentGroups": [
      {
        "classifications": [],
        "code": "SERVICE",
        "components": [
          {
            "additionalFields": [],
            "attributeCategories": [],
            "description": "Introducing the Cisco Rack Server NX44 Service, a
comprehensive protection plan designed to safeguard your valuable data infrastructure.
With extended coverage and rapid response times, this warranty ensures peace of mind
and uninterrupted performance for your critical business operations.",
            "id": "01txx0000006jmWAAQ",
            "isActive": true,
            "isAssetizable": true,
            "isComponentRequired": false,
            "isConfigurable": false,
            "isDefaultComponent": false,
            "isQuantityEditable": false,
            "isSoldOnlyWithOtherProds": false,
            "name": "Cisco Rack Server Service - 1 Year",
            "nodeType": "simpleProduct",
            "prices": [],
            "productClassification": {},
            "productCode": "SERVICE",
            "productComponentGroups": [],
            "productRelatedComponent": {
              "childProductId": "01txx0000006jmWAAQ",
              "childSellingModelId": "0jPxx000000004rEAA",
              "doesBundlePriceIncludeChild": true,
              "id": "0dSxx000000001dEAA",
              "isComponentRequired": false,
              "isDefaultComponent": false,
              "isQuantityEditable": false,
              "parentProductId": "01txx0000006jkuAAA",
              "parentSellingModelId": "0jPxx000000004rEAA",
              "productComponentGroupId": "0y7xx000000001dAAA",
              "productRelationshipTypeId": "0yoxx00000001IfAAI",
              "quantity": 1,
              "quantityScaleMethod": "Proportional"
            },
          },
          {
            "productSellingModelOptions": [
              {
                "id": "0iOxx000000009hEAA",
                "productId": "01txx0000006jmWAAQ",

```

```

        "productSellingModel": {
          "id": "0jPxx000000004rEAA",
          "name": "Termed Annually",
          "pricingTerm": 1,
          "pricingTermUnit": "Annual",
          "sellingModelType": "TermDefined",
          "status": "Active"
        },
        "productSellingModelId": "0jPxx000000004rEAA"
      },
      {
        "id": "0iOxx00000000PpEAI",
        "productId": "01txx0000006jmWAAQ",
        "productSellingModel": {
          "id": "0jPxx0000000085EAA",
          "name": "Evergreen Annually",
          "pricingTerm": 1,
          "pricingTermUnit": "Annual",
          "sellingModelType": "Evergreen",
          "status": "Active"
        },
        "productSellingModelId": "0jPxx0000000085EAA"
      }
    ]
  }
},
"description": "The services available for the Cisco Server Rack NX44 product
provide comprehensive coverage and support for optimal performance and reliability,
ensuring peace of mind for your data center infrastructure.",
"id": "0y7xx000000001dAAA",
"maxBundleComponents": 1,
"minBundleComponents": 0,
"name": "Services",
"parentProductId": "01txx0000006jkuAAA",
"sequence": 1
},
{
  "classifications": [],
  "code": "WARRANTY",
  "components": [
    {
      "additionalFields": [],
      "attributeCategories": [],
      "description": "Introducing the Cisco Rack Server NX44 Warranty, a
comprehensive protection plan designed to safeguard your valuable data infrastructure.
With extended coverage and rapid response times, this warranty ensures peace of mind
and uninterrupted performance for your critical business operations.",
      "id": "01txx0000006jjIAAQ",
      "isActive": true,
      "isAssetizable": true,
      "isComponentRequired": false,
      "isConfigurable": false,
      "isDefaultComponent": true,
      "isQuantityEditable": true,

```

```

"isSoldOnlyWithOtherProds": false,
"name": "Cisco Rack Server Warranty - 1 Year",
"nodeType": "simpleProduct",
"prices": [],
"productClassification": {},
"productCode": "WARRANTY",
"productComponentGroups": [],
"productRelatedComponent": {
  "childProductId": "01txx0000006jjIAAQ",
  "childSellingModelId": "0jPxx000000001dEAA",
  "doesBundlePriceIncludeChild": false,
  "id": "0dSxx0000000001EAA",
  "isComponentRequired": false,
  "isDefaultComponent": true,
  "isQuantityEditable": true,
  "maxQuantity": 1,
  "parentProductId": "01txx0000006jkuAAA",
  "parentSellingModelId": "0jPxx000000001dEAA",
  "productComponentGroupId": "0y7xx0000000001AAA",
  "productRelationshipTypeId": "0yoxx00000001IfAAI",
  "quantity": 1,
  "quantityScaleMethod": "Proportional",
  "sequence": 0
},
"productSellingModelOptions": [
  {
    "id": "0iOxx000000001dEAA",
    "productId": "01txx0000006jjIAAQ",
    "productSellingModel": {
      "id": "0jPxx000000001dEAA",
      "name": "One Time",
      "sellingModelType": "OneTime",
      "status": "Active"
    },
    "productSellingModelId": "0jPxx000000001dEAA"
  },
  {
    "id": "0iOxx00000000H1EAI",
    "productId": "01txx0000006jjIAAQ",
    "productSellingModel": {
      "id": "0jPxx000000003FEAQ",
      "name": "Termed Monthly",
      "pricingTerm": 1,
      "pricingTermUnit": "Months",
      "sellingModelType": "TermDefined",
      "status": "Active"
    },
    "productSellingModelId": "0jPxx000000003FEAQ"
  },
  {
    "id": "0iOxx00000000JNEAY",
    "productId": "01txx0000006jjIAAQ",
    "productSellingModel": {
      "id": "0jPxx000000004rEAA",

```



```

        "name": "Termed Annually",
        "pricingTerm": 1,
        "pricingTermUnit": "Annual",
        "sellingModelType": "TermDefined",
        "status": "Active"
    },
    "productSellingModelId": "0jPxx000000004rEAA"
},
{
    "id": "0iOxx00000000KzEAI",
    "productId": "01txx0000006jjIAAQ",
    "productSellingModel": {
        "id": "0jPxx0000000085EAA",
        "name": "Evergreen Annually",
        "pricingTerm": 1,
        "pricingTermUnit": "Annual",
        "sellingModelType": "Evergreen",
        "status": "Active"
    },
    "productSellingModelId": "0jPxx0000000085EAA"
},
{
    "id": "0iOxx00000000MbEAI",
    "productId": "01txx0000006jjIAAQ",
    "productSellingModel": {
        "id": "0jPxx000000006TEAQ",
        "name": "Evergreen Monthly",
        "pricingTerm": 1,
        "pricingTermUnit": "Months",
        "sellingModelType": "Evergreen",
        "status": "Active"
    },
    "productSellingModelId": "0jPxx000000006TEAQ"
}
]
}
],
"description": "The warranties available for the Cisco Server Rack NX44 product
provide comprehensive coverage and support for optimal performance and reliability,
ensuring peace of mind for your data center infrastructure.",
    "id": "0y7xx0000000001AAA",
    "maxBundleComponents": 1,
    "minBundleComponents": 0,
    "name": "Warranties",
    "parentProductId": "01txx0000006jkuAAA",
    "sequence": 0
}
],
"productSellingModelOptions": [
    {
        "id": "0iOxx000000003FEAQ",
        "productId": "01txx0000006jkuAAA",
        "productSellingModel": {
            "id": "0jPxx000000001dEAA",

```

```

        "name": "One Time",
        "sellingModelType": "OneTime",
        "status": "Active"
    },
    "productSellingModelId": "0jPxx000000001dEAA"
},
{
    "id": "0iOxx000000004rEAA",
    "productId": "01txx0000006jkuAAA",
    "productSellingModel": {
        "id": "0jPxx000000003FEAQ",
        "name": "Termed Monthly",
        "pricingTerm": 1,
        "pricingTermUnit": "Months",
        "sellingModelType": "TermDefined",
        "status": "Active"
    },
    "productSellingModelId": "0jPxx000000003FEAQ"
},
{
    "id": "0iOxx000000006TEAQ",
    "productId": "01txx0000006jkuAAA",
    "productSellingModel": {
        "id": "0jPxx000000004rEAA",
        "name": "Termed Annually",
        "pricingTerm": 1,
        "pricingTermUnit": "Annual",
        "sellingModelType": "TermDefined",
        "status": "Active"
    },
    "productSellingModelId": "0jPxx000000004rEAA"
}
],
"productType": "Bundle"
},
"uiTreatments": [
    {
        "details": {
            "attributeId": "0tjxx0000000007AAA",
            "prcId": "0dSxx0000000007EAA",
            "stiId": "0QLxx0000004CU0GAM",
            "attributePicklistValueId": "0v6xx0000000005AAA"
        },
        "uiTreatmentScope": "Bundle",
        "uiTreatmentTarget": "Attribute_Picklist_Value",
        "uiTreatmentType": "Hide"
    },
    {
        "details": {
            "stiId": "ref_f0f2da7b_c431_482d_bf4b_599052f3a2e1"
        },
        "uiTreatmentScope": "Product",
        "uiTreatmentTarget": "Component",
        "uiTreatmentType": "Disable"
    }
]

```

```

    }
  ],
  "errors": [],
  "success": true,
  "productRecommendations": [
    {
      "referenceId": "CORE_BUNDLE_001",
      "productIds": [
        "01t000000001234",
        "01t000000005678"
      ]
    }
  ],
  "transactionContext": {
    "SalesTransaction": [
      {
        "Status": "Draft",
        "Account": "001xx000003GeIxAAK",
        "BillingCity": "San Francisco",
        "Subtotal": 152500,
        "LastPricedDate": "2023-08-22T05:55:39Z",
        "businessObjectType": "Quote",
        "TotalAmount": 152500,
        "ShippingStreet": "415 Mission St",
        "SalesTransactionItem": [
          {
            "ProrationPolicy": null,
            "Discount": null,
            "ProductSellingModel": "0jPxx000000001dEAA",
            "Product": "01txx0000006jkuAAA",
            "businessObjectType": "QuoteLineItem",
            "BasisTransactionItem": null,
            "PartnerUnitPrice": null,
            "StartingUnitPriceSource": "System",
            "ListPrice": 150000,
            "ItemTotalAdjustmentAmount": 0,
            "SalesTransactionItemSource": "0QLxx0000004CQmGAM",
            "SubscriptionTerm": null,
            "StartDate": null,
            "NetTotalPrice": 150000,
            "TotalLineAmount": 150000,
            "PeriodBoundaryStartMonth": null,
            "ListPriceTotal": 150000,
            "PartnerDiscountPercent": null,
            "id": "0QLxx0000004CQmGAM",
            "PriceWaterFall": {
              "currencyCode": "USD",
              "executionEndTimestamp": "2023-09-18T20:11:15.016Z",
              "executionId": "ruepwmHn2ZFvnQo5bjot",
              "executionStartTimestamp": "2023-09-18T20:11:14.906Z",
              "lineItemId": "0QLxx0000004CQmGAM",
              "output": {
                "NetUnitPrice": 150000,
                "Subtotal": 0
              }
            }
          }
        ]
      }
    ]
  }
}

```

```

    },
    "success": true,
    "waterfall": [
      {
        "fieldToTagNameMapping": {
          "NetUnitPrice": "ItemUnitPrice",
          "AdjustmentValue": "ItemAdjustmentValue",
          "Subtotal": "ItemTotalAdjustmentAmount",
          "Quantity": "ItemQuantity",
          "LineItemId": "SalesTransactionItemSource",
          "InputUnitPrice": "ItemUnitPrice"
        },
        "inputParameters": {
          "Quantity": 1,
          "LineItemId": "0QLxx0000004CQmGAM",
          "InputUnitPrice": 150000,
          "AdjustmentType": "Amount"
        },
        "outputParameters": {
          "NetUnitPrice": 150000,
          "Subtotal": 0
        },
        "pricingElement": {
          "adjustments": [
            {
              "AdjustmentType": "Amount"
            }
          ],
          "elementType": "MANUALDISCOUNT",
          "name": "ManualDiscount"
        },
        "sequence": 1
      }
    ]
  },
  "BillingFrequency": null,
  "SalesTransactionItemParent": "0Q0xx0000004CAeCAM",
  "StartingPriceTotal": 150000,
  "Quantity": 1,
  "PeriodBoundary": null,
  "SalesTransactionItemAttribute": [
    {
      "AttributeKey": "0tjxx00000001H3AAI",
      "AttributeValue": "30.0",
      "AttributePicklistValue": null,
      "IsPriceImpacting": true,
      "businessObjectType": "QuoteLineItemAttribute",
      "AttributeName": "Expansion Slots",
      "AttributeDefinitionCode": "SLOTCAP",
      "id": "0zuxx0000000001AAA",
      "SalesTransactionItemAttrParent": "0QLxx0000004CQmGAM"
    }
  ],
  "EndDate": null,

```

```

"DiscountAmount": null,
"PricebookEntry": "01luxx0000009154AAA",
"PricingTermCount": 1,
"NetUnitPrice": 150000,
"UnitPrice": 150000,
"StartingUnitPrice": 150000,
"SalesTrxnItemRelationship": [
  {
    "ProductRelationshipType": "0yoxx00000001IfAAI",
    "MainItemRole": "Bundle",
    "AssociatedItem": "0QLxx0000004CQnGAM",
    "ProductRelatedComponent": "0dSxx0000000001EAA",
    "MainItem": "0QLxx0000004CQmGAM",
    "AssociatedQuantScaleMethod": "Proportional",
    "businessObjectType": "QuoteLineRelationship",
    "AssociatedItemRole": "BundleComponent",
    "SalesTrnItemRelationshipParent": "0Q0xx0000004CAeCAM",
    "id": "0yQxx000000001dEAA",
    "AssociatedItemPricing": "NotIncludedInBundlePrice"
  }
],
"TotalPrice": 150000,
"PeriodBoundaryDay": null
},
{
  "ProrationPolicy": null,
  "Discount": null,
  "ProductSellingModel": "0jPxx0000000001dEAA",
  "Product": "01txx0000006jjIAAQ",
  "businessObjectType": "QuoteLineItem",
  "BasisTransactionItem": null,
  "PartnerUnitPrice": null,
  "StartingUnitPriceSource": "System",
  "ListPrice": 2000,
  "ItemTotalAdjustmentAmount": 0,
  "SalesTransactionItemSource": "0QLxx0000004CQnGAM",
  "SubscriptionTerm": null,
  "StartDate": null,
  "NetTotalPrice": 2000,
  "TotalLineAmount": 2000,
  "PeriodBoundaryStartMonth": null,
  "ListPriceTotal": 2000,
  "PartnerDiscountPercent": null,
  "id": "0QLxx0000004CQnGAM",
  "PriceWaterFall": {
    "currencyCode": "USD",
    "executionEndTimestamp": "023-09-18T20:11:15.016Z",
    "executionId": "ruepwmHn2ZFvnQo5bjot",
    "executionStartTimestamp": "2023-09-18T20:11:14.906Z",
    "lineItemId": "0QLxx0000004CQnGAM",
    "output": {
      "NetUnitPrice": 2000,
      "Subtotal": 0
    }
  }
},

```

```

    "success": true,
    "waterfall": [
      {
        "fieldToTagNameMapping": {
          "NetUnitPrice": "ItemUnitPrice",
          "AdjustmentValue": "ItemAdjustmentValue",
          "Subtotal": "ItemTotalAdjustmentAmount",
          "Quantity": "ItemQuantity",
          "LineItemId": "SalesTransactionItemSource",
          "InputUnitPrice": "ItemUnitPrice"
        },
        "inputParameters": {
          "Quantity": 1,
          "LineItemId": "0QLxx0000004CQnGAM",
          "InputUnitPrice": 2000,
          "AdjustmentType": "Amount"
        },
        "outputParameters": {
          "NetUnitPrice": 2000,
          "Subtotal": 0
        },
        "pricingElement": {
          "adjustments": [
            {}
          ],
          "elementType": "MANUALDISCOUNT",
          "name": "ManualDiscount"
        },
        "sequence": 1
      }
    ],
    "BillingFrequency": null,
    "SalesTransactionItemParent": "0Q0xx0000004CAeCAM",
    "StartingPriceTotal": 2000,
    "Quantity": 1,
    "PeriodBoundary": null,
    "EndDate": null,
    "DiscountAmount": null,
    "PricebookEntry": "01luxx000000913SAAQ",
    "PricingTermCount": 1,
    "NetUnitPrice": 2000,
    "UnitPrice": 2000,
    "StartingUnitPrice": 2000,
    "TotalPrice": 2000,
    "PeriodBoundaryDay": null
  },
  "BillingCountry": "US",
  "BillingStreet": "415 Mission St",
  "Pricebook": "01sxx0000005uDZAAAY",
  "ShippingPostalCode": "94105",
  "SalesTransactionSource": "0Q0xx0000004CAeCAM",
  "ShippingCountry": "US",

```

```

        "ShippingCity": "San Francisco",
        "ShippingState": "CA",
        "BillingPostalCode": "94105",
        "id": "0Q0xx0000004CAeCAM",
        "BillToContact": null,
        "Contract": null,
        "BillingState": "CA"
    }
]
},
"transactionContextId": "cda87acd-45ed-4913-903e-9dd33cec85a6",
"transactionContextMappingId": "11jxx0000004LwOAAU"
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
catalog Products	Configurator Product Catalog[]	Structure that contains the product catalog data.	Small, 61.0	61.0
errors	ConnectApiErrorResponse	List of errors that contains a message and an error code.	Small, 60.0	60.0
messages	Map<String, Configurator Message >>	Messages from the validation, Business Rules Engine (BRE), or Salesforce Pricing calls.	Small, 60.0	60.0
product Recommendations	Configurator Product Recommendations	List of product recommendations.	Small, 65.0	65.0
success	Boolean	Indicates whether the request is successful (<code>true</code>) or not (<code>false</code>).	Small, 60.0	60.0
transaction Context	Map<String, Object>	Serialized JSON representation of the transaction context.	Small, 60.0	60.0
transaction ContextId	String	ID of the transaction context.	Small, 60.0	60.0
transactionContext MappingId	String	ID of the context mapping.	Small, 60.0	60.0
transaction Qualification	Map<String, Configurator Qualification Context >	Map of the product IDs to the qualification context.	Small, 60.0	60.0
uiTreatments	Configurator UI Treatment []	Details of the UI treatments that specify the product configuration rule actions to override the disable or hide behavior in the UI for product options, product attributes, and attribute picklist values.	Small, 62.0	62.0

Configuration Get Instance

Output representation of the request to retrieve the configuration instance.

Property Name	Type	Description	Filter Group and Version	Available Version
errors	Error Response	List of errors, which contains an error code and a message.	Small, 60.0	60.0
success	Boolean	Indicates whether the call was successful (<code>true</code>) not (<code>false</code>).	Small, 60.0	60.0
transaction	Map<String, Object>	Transaction JSON payload representing an object in an external system that's used to create a session.	Small, 60.0	60.0

Configuration Load Instance

Output representation of the details of the context or session that are returned with a load configuration request.

JSON Example

```
{
  "configuratorMessages": {},
  "configuratorUITreatments": [
    {
      "details": {
        "attributeId": "0tjxx0000000007AAA",
        "prcId": "0dSxx0000000007EAA",
        "stiId": "0QLxx0000004CU0GAM",
        "attributePicklistValueId": "0v6xx0000000005AAA"
      },
      "uiTreatmentScope": "Bundle",
      "uiTreatmentTarget": "Attribute_Picklist_Value",
      "uiTreatmentType": "Hide"
    },
    {
      "details": {
        "stiId": "ref_f0f2da7b_c431_482d_bf4b_599052f3a2e1"
      },
      "uiTreatmentScope": "Product",
      "uiTreatmentTarget": "Component",
      "uiTreatmentType": "Disable"
    }
  ],
  "contextId": "831f07b01cf0cbd2d046adf5350420f85f0611b4b1e22e183921a063857a1377",
  "errors": [],
  "productQualifications": {
    "01tDU000000EOTCYA4": {
      "isQualified": true
    }
  }
},
```



```
"success": true
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
configurator Messages	Map<String, <Configurator Message>>	Map of the product IDs to the list of configurator messages. Configurator messages are results from any validations, Business Rules Engines (BRE) calls, or Salesforce Pricing calls.	Small, 60.0	60.0
configurator UITreatments	Configurator UITreatment[]	Details of the UI treatments that specify the product configuration rule actions to override the disable or hide behavior in the UI for product options, product attributes, and attribute picklist values.	Small, 62.0	62.0
contextId	String	ID of the transaction context.	Small, 60.0	60.0
errors	Error Response	List of errors, which contains an error code and a message.	Small, 60.0	60.0
product Qualifications	Map<String, Configurator Qualification Context>	Map of the product IDs to the execution results from qualification rules.	Small, 60.0	60.0
success	Boolean	Indicates whether the call was successful (<code>true</code>) not (<code>false</code>).	Small, 60.0	60.0

Configuration Save Details

Output representation of the details of a saved configuration.

JSON example

```
{
  "savedConfigurations": [
    {
      "data":
      Built-in
      "description": "This configuration is for cline XYZ",
      "id": "1Nyxx0000004CFUCA2",
      "name": "Client XYZ Favorite",
      "referenceRecordId": "01txx0000006iCFAAY"
    },
    {
```

```

    "data":
    Built-in
    "description": "This configuration is for cline XYZ",
    "id": "1Nyxx0000004CH6CAM",
    "name": "Client XYZ Favorite",
    "referenceRecordId": "01ttx0000006iCFAAY"
  }
]
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
data	String	JSON object that contains the details of the sales transaction, formatted as a string.	Small, 63.0	63.0
description	String	Description of the saved configuration.	Small, 63.0	63.0
id	String	ID of the saved configuration.	Small, 63.0	63.0
name	String	Name of the saved configuration.	Small, 63.0	63.0
referenceRecordId	String	ID of the record that the saved configuration belongs to.	Small, 63.0	63.0

Configuration Record Save

Output representation of the details of a saved configuration.

JSON example

This example shows a sample when the save operation is successful.

```

{
  "errors": [],
  "id": "1Nyxx0000004CNYCA2"
}

```

This example shows a sample when the save operation has errors.

```

{
  "errors": [{
    "code": "INTERNAL_SERVER_ERROR",
    "message": "INVALID_REFERENCEOBJECTID"
  }]
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
errors	Error Response	List of errors that contains a message and an error code.	Small, 63.0	63.0
id	String	ID of the configuration that's saved. This property isn't shown if the operation has errors.	Small, 63.0	63.0

Configuration List

Output representation of the details of the saved configuration.

JSON example

```
{
  "errors": [],
  "savedConfigurations": [
    {
      "data":
        Built-in
        "description": "This configuration is saved for reuse.",
        "id": "1Nyxx0000004CFUCA2",
        "name": "Favorite Configuration",
        "referenceRecordId": "01txx0000006iCFAAY"
    },
    {
      "data":
        Built-in
        "description": "This configuration is saved for reuse.",
        "id": "1Nyxx0000004CH6CAM",
        "name": "Configuration 2",
        "referenceRecordId": "01txx0000006iCFAAY"
    }
  ],
  "success": true
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
errors	Error Response	List of errors that contains a message and an error code.	Small, 63.0	63.0
saved Configurations	Configuration Save Details	Configuration details associated with the referenceRecordID request parameter.	Small, 63.0	63.0
success	Boolean	Indicates whether the operation is successful (<code>true</code>) or not (<code>false</code>).	Small, 63.0	63.0

Configuration Save Instance

Output representation of the response that's returned with a save configuration request.

Property Name	Type	Description	Filter Group and Version	Available Version
errors	Error Response	List of errors, which contains an error code and a message.	Small, 60.0	60.0
success	Boolean	Indicates whether the call was successful (<code>true</code>) not (<code>false</code>).	Small, 60.0	60.0

Configuration Set Instance

Output representation of the details of the context or session that are returned with a set configuration request.

JSON Example

```
{
  "configuratorMessages": {},
  "configuratorUITreatments": [
    {
      "details": {
        "attributeId": "0tjxx0000000007AAA",
        "prcId": "0dSxx0000000007EAA",
        "stiId": "0QLxx0000004CU0GAM",
        "attributePicklistValueId": "0v6xx0000000005AAA"
      },
      "uiTreatmentScope": "Bundle",
      "uiTreatmentTarget": "Attribute_Picklist_Value",
      "uiTreatmentType": "Hide"
    },
    {
      "details": {
        "stiId": "ref_f0f2da7b_c431_482d_bf4b_599052f3a2e1"
      },
      "uiTreatmentScope": "Product",
      "uiTreatmentTarget": "Component",
      "uiTreatmentType": "Disable"
    }
  ]
}
```

```

    }
  ],
  "contextId": "831f07b01cf0cbd2d046adf5350420f85f0611b4b1e22e183921a063857a1377",
  "errors": [],
  "productQualifications": {
    "01tDU000000EOTCYA4": {
      "isQualified": true
    }
  },
  "success": true
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
configurator Messages	Map<String, <Configurator Message>>	Map of the product IDs to the list of configurator messages. Configurator messages are results from any validations, Business Rules Engines (BRE) calls, or Salesforce Pricing calls.	Small, 60.0	60.0
configurator UITreatments	Configurator UI Treatment[]	Details of the UI treatments that specify the product configuration rule actions to override the disable or hide behavior in the UI for product options, product attributes, and attribute picklist values.	Small, 62.0	62.0
contextId	String	ID of the transaction context.	Small, 60.0	60.0
errors	Error Response	List of errors, which contains an error code and a message.	Small, 60.0	60.0
product Qualifications	Map<String, Configurator Qualification Context>	Map of the product IDs to the execution results from qualification rules.	Small, 60.0	60.0
success	Boolean	Indicates whether the call was successful (<code>true</code>) not (<code>false</code>).	Small, 60.0	60.0

Configurator Add Nodes

Output representation of the configuration request details to add nodes.

JSON Example

```

{
  "configuratorMessages": {},
  "configuratorUITreatments": [
    {
      "details": {
        "attributeId": "0tjxx0000000007AAA",
        "prcId": "0dSxx0000000007EAA",

```

```

    "stiId": "0QLxx0000004CU0GAM",
    "attributePicklistValueId": "0v6xx000000005AAA"
  },
  "uiTreatmentScope": "Bundle",
  "uiTreatmentTarget": "Attribute_Picklist_Value",
  "uiTreatmentType": "Hide"
},
{
  "details": {
    "stiId": "ref_f0f2da7b_c431_482d_bf4b_599052f3a2e1"
  },
  "uiTreatmentScope": "Product",
  "uiTreatmentTarget": "Component",
  "uiTreatmentType": "Disable"
}
],
"errors": [],
"productQualifications": {
  "01tDU000000EOTCYA4": {
    "isQualified": true
  }
},
"success": true
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
configurator Messages	Map<String, Configurator Message >	Map of the product IDs to the list of configurator messages. Configurator messages are results from any validations, Business Rules Engines (BRE) calls, or Salesforce Pricing calls.	Small, 60.0	60.0
configurator UITreatments	Configurator UI Treatment []	Details of the UI treatments that specify the product configuration rule actions to override the disable or hide behavior in the UI for product options, product attributes, and attribute picklist values.	Small, 62.0	62.0
errors	Error Response	List of errors, which contains an error code and a message.	Small, 60.0	60.0
product Qualifications	Map<String, Configurator Qualification Context >	Map of the product IDs to the qualification rule execution results.	Small, 60.0	60.0
success	Boolean	Indicates whether the call was successful (<code>true</code>) not (<code>false</code>).	Small, 60.0	60.0

Configurator Additional Fields

Output representation of the additional fields of a product configuration.

Property Name	Type	Description	Filter Group and Version	Available Version
fieldApiName	String	API name of the field.	Small, 60.0	60.0
fieldName	String	Name of the field.	Small, 60.0	60.0
value	String	Value of the field.	Small, 60.0	60.0

Configurator Attribute

Output representation of the attribute in a product configuration.

JSON example

```

"attributeCategories": [
  {
    "attributes": [
      {
        "attributeCategoryId": "0v3xx000000001AAA",
        "attributeNameOverride": "Load Capacity",
        "code": "CAP",
        "dataType": "NUMBER",
        "defaultValue": "1500",
        "description": "Server racks are designed to support a specific load capacity, commonly measured in kilograms (kg) or pounds (lbs). Typical load capacities range from 500 kg (1102 lbs) to 1500 kg (3307 lbs) depending on the model.",
        "id": "0tjxx00000001DpAAI",
        "isCloneable": false,
        "isConfigurable": true,
        "isHidden": false,
        "isPriceImpacting": false,
        "isReadOnly": false,
        "isRequired": false,
        "label": "Load Capacity",
        "name": "Load Capacity"
      },
      {
        "attributeCategoryId": "0v3xx000000001AAA",
        "attributeNameOverride": "Expansion Slots",
        "code": "SLOTCAP",
        "dataType": "NUMBER",
        "defaultValue": "12",
        "id": "0tjxx00000001H3AAI",
        "isCloneable": false,
        "isConfigurable": true,
        "isHidden": false,
        "isPriceImpacting": false,
        "isReadOnly": false,
        "isRequired": true,

```

```

    "label": "Expansion Slots",
    "name": "Expansion Slots"
  },
  {
    "attributeCategoryId": "0v3xx0000000001AAA",
    "attributeNameOverride": "Memory",
    "attributePicklist": {
      "id": "0v5xx0000000001AAA",
      "values": [
        {
          "code": "MEM",
          "displayValue": "25",
          "id": "0v6xx0000000001AAA",
          "isBooleanValue": false,
          "name": "25Mem",
          "sequence": 0,
          "textValue": "25"
        },
        {
          "code": "50MEM",
          "displayValue": "50",
          "id": "0v6xx0000000001eAAA",
          "isBooleanValue": false,
          "name": "50Mem",
          "sequence": 1,
          "textValue": "50"
        },
        {
          "code": "100MEM",
          "displayValue": "100",
          "id": "0v6xx0000000003FAAQ",
          "isBooleanValue": false,
          "name": "100Mem",
          "sequence": 2,
          "textValue": "100"
        }
      ]
    },
    "dataType": "MULTIPICKLIST",
    "defaultValue": "25",
    "id": "0tjxx000000001IfAAI",
    "isCloneable": false,
    "isConfigurable": true,
    "isHidden": false,
    "isPriceImpacting": false,
    "isReadOnly": false,
    "isRequired": true,
    "label": "Memory",
    "name": "Memory"
  }
],
"code": "SPEC",
"name": "Server Rack Specifications"
}

```



```

    ],
    "description": "Introducing the Cisco Server Rack, a sleek and robust solution
designed to streamline your data center infrastructure. With its scalable design and
advanced cable management features, it ensures optimal performance, efficiency, and easy
maintenance for your critical network equipment.",
    "displayUrl":
"https://www.cisco.com/content/dam/en/us/products/servers-unified-computing/ucs-c240-m4-rack-server/product-large.jpg",

    "id": "01txx0000006jkuAAA",
    "isActive": true,
    "isAssetizable": true,
    "isConfigurable": true,
    "isSoldOnlyWithOtherProds": false,
    "name": "Cisco Server Rack NX44",
    "nodeType": "bundleProduct",
    "prices": [],
    "productClassification": {
      "id": "11Bxx000002CC02EAG"
    },
    "productCode": "RACK",
    "productComponentGroups": [
      {
        "classifications": [],
        "code": "SERVICE",
        "components": [
          {
            "additionalFields": [],
            "attributeCategories": [],
            "description": "Introducing the Cisco Rack Server NX44 Service, a
comprehensive protection plan designed to safeguard your valuable data infrastructure.
With extended coverage and rapid response times, this warranty ensures peace of mind
and uninterrupted performance for your critical business operations.",
            "id": "01txx0000006jmWAAQ",
            "isActive": true,
            "isAssetizable": true,
            "isComponentRequired": false,
            "isConfigurable": false,
            "isDefaultComponent": false,
            "isQuantityEditable": false,
            "isSoldOnlyWithOtherProds": false,
            "name": "Cisco Rack Server Service - 1 Year",
            "nodeType": "simpleProduct",
            "prices": [],
            "productClassification": {},
            "productCode": "SERVICE",
            "productComponentGroups": [],
            "productRelatedComponent": {
              "childProductId": "01txx0000006jmWAAQ",
              "childSellingModelId": "0jPxx000000004rEAA",
              "doesBundlePriceIncludeChild": true,
              "id": "0dSxx000000001dEAA",
              "isComponentRequired": false,
              "isDefaultComponent": false,
              "isQuantityEditable": false,

```

```

    "parentProductId": "01txx0000006jkuAAA",
    "parentSellingModelId": "0jPxx000000004rEAA",
    "productComponentGroupId": "0y7xx000000001dAAA",
    "productRelationshipTypeId": "0yoxx00000001IfAAI",
    "quantity": 1,
    "quantityScaleMethod": "Proportional"
  },
  "productSellingModelOptions": [
    {
      "id": "0iOxx000000009hEAA",
      "productId": "01txx0000006jmWAAQ",
      "productSellingModel": {
        "id": "0jPxx000000004rEAA",
        "name": "Termed Annually",
        "pricingTerm": 1,
        "pricingTermUnit": "Annual",
        "sellingModelType": "TermDefined",
        "status": "Active"
      },
      "productSellingModelId": "0jPxx000000004rEAA"
    },
    {
      "id": "0iOxx00000000PpEAI",
      "productId": "01txx0000006jmWAAQ",
      "productSellingModel": {
        "id": "0jPxx0000000085EAA",
        "name": "Evergreen Annually",
        "pricingTerm": 1,
        "pricingTermUnit": "Annual",
        "sellingModelType": "Evergreen",
        "status": "Active"
      },
      "productSellingModelId": "0jPxx0000000085EAA"
    }
  ]
}
],
"description": "The services available for the Cisco Server Rack NX44 product
provide comprehensive coverage and support for optimal performance and reliability,
ensuring peace of mind for your data center infrastructure.",
"id": "0y7xx000000001dAAA",
"maxBundleComponents": 1,
"minBundleComponents": 0,
"name": "Services",
"parentProductId": "01txx0000006jkuAAA",
"sequence": 1
},
{
  "classifications": [],
  "code": "WARRANTY",
  "components": [
    {
      "additionalFields": [],
      "attributeCategories": [],

```

```

    "description": "Introducing the Cisco Rack Server NX44 Warranty, a
comprehensive protection plan designed to safeguard your valuable data infrastructure.
With extended coverage and rapid response times, this warranty ensures peace of mind
and uninterrupted performance for your critical business operations.",
    "id": "01txx0000006jjIAAQ",
    "isActive": true,
    "isAssetizable": true,
    "isComponentRequired": false,
    "isConfigurable": false,
    "isDefaultComponent": true,
    "isQuantityEditable": true,
    "isSoldOnlyWithOtherProds": false,
    "name": "Cisco Rack Server Warranty - 1 Year",
    "nodeType": "simpleProduct",
    "prices": [],
    "productClassification": {},
    "productCode": "WARRANTY",
    "productComponentGroups": [],
    "productRelatedComponent": {
      "childProductId": "01txx0000006jjIAAQ",
      "childSellingModelId": "0jPxx000000001dEAA",
      "doesBundlePriceIncludeChild": false,
      "id": "0dSxx0000000001EAA",
      "isComponentRequired": false,
      "isDefaultComponent": true,
      "isQuantityEditable": true,
      "maxQuantity": 1,
      "parentProductId": "01txx0000006jkuAAA",
      "parentSellingModelId": "0jPxx000000001dEAA",
      "productComponentGroupId": "0y7xx0000000001AAA",
      "productRelationshipTypeId": "0yoxx000000001IfAAI",
      "quantity": 1,
      "quantityScaleMethod": "Proportional",
      "sequence": 0
    },
    "productSellingModelOptions": [
      {
        "id": "0iOxx000000001dEAA",
        "productId": "01txx0000006jjIAAQ",
        "productSellingModel": {
          "id": "0jPxx000000001dEAA",
          "name": "One Time",
          "sellingModelType": "OneTime",
          "status": "Active"
        },
        "productSellingModelId": "0jPxx000000001dEAA"
      },
      {
        "id": "0iOxx00000000H1EAI",
        "productId": "01txx0000006jjIAAQ",
        "productSellingModel": {
          "id": "0jPxx000000003FEAQ",
          "name": "Termed Monthly",
          "pricingTerm": 1,

```

```

        "pricingTermUnit": "Months",
        "sellingModelType": "TermDefined",
        "status": "Active"
    },
    "productSellingModelId": "0jPxx000000003FEAQ"
},
{
    "id": "0iOxx00000000JNEAY",
    "productId": "01txx0000006jjIAAQ",
    "productSellingModel": {
        "id": "0jPxx000000004rEAA",
        "name": "Termed Annually",
        "pricingTerm": 1,
        "pricingTermUnit": "Annual",
        "sellingModelType": "TermDefined",
        "status": "Active"
    },
    "productSellingModelId": "0jPxx000000004rEAA"
},
{
    "id": "0iOxx00000000KzEAI",
    "productId": "01txx0000006jjIAAQ",
    "productSellingModel": {
        "id": "0jPxx0000000085EAA",
        "name": "Evergreen Annually",
        "pricingTerm": 1,
        "pricingTermUnit": "Annual",
        "sellingModelType": "Evergreen",
        "status": "Active"
    },
    "productSellingModelId": "0jPxx0000000085EAA"
},
{
    "id": "0iOxx00000000MbEAI",
    "productId": "01txx0000006jjIAAQ",
    "productSellingModel": {
        "id": "0jPxx000000006TEAQ",
        "name": "Evergreen Monthly",
        "pricingTerm": 1,
        "pricingTermUnit": "Months",
        "sellingModelType": "Evergreen",
        "status": "Active"
    },
    "productSellingModelId": "0jPxx000000006TEAQ"
}
]
}
],
    "description": "The warranties available for the Cisco Server Rack NX44 product
provide comprehensive coverage and support for optimal performance and reliability,
ensuring peace of mind for your data center infrastructure.",
    "id": "0y7xx0000000001AAA",
    "maxBundleComponents": 1,
    "minBundleComponents": 0,

```

```

    "name": "Warranties",
    "parentProductId": "01txx0000006jkuAAA",
    "sequence": 0
  }
],
"productSellingModelOptions": [
  {
    "id": "0iOxx000000003FEAQ",
    "productId": "01txx0000006jkuAAA",
    "productSellingModel": {
      "id": "0jPxx000000001dEAA",
      "name": "One Time",
      "sellingModelType": "OneTime",
      "status": "Active"
    },
    "productSellingModelId": "0jPxx000000001dEAA"
  },
  {
    "id": "0iOxx000000004rEAA",
    "productId": "01txx0000006jkuAAA",
    "productSellingModel": {
      "id": "0jPxx000000003FEAQ",
      "name": "Termed Monthly",
      "pricingTerm": 1,
      "pricingTermUnit": "Months",
      "sellingModelType": "TermDefined",
      "status": "Active"
    },
    "productSellingModelId": "0jPxx000000003FEAQ"
  },
  {
    "id": "0iOxx000000006TEAQ",
    "productId": "01txx0000006jkuAAA",
    "productSellingModel": {
      "id": "0jPxx000000004rEAA",
      "name": "Termed Annually",
      "pricingTerm": 1,
      "pricingTermUnit": "Annual",
      "sellingModelType": "TermDefined",
      "status": "Active"
    },
    "productSellingModelId": "0jPxx000000004rEAA"
  }
],
"productType": "Bundle"
},
"errors": [],
"success": true,
"transactionContext": {
  "SalesTransaction": [
    {
      "Status": "Draft",
      "Account": "001xx000003GeIXAAK",
      "BillingCity": "San Francisco",

```

```

"Subtotal": 152500,
"LastPricedDate": "2023-08-22T05:55:39Z",
"businessObjectType": "Quote",
"TotalAmount": 152500,
"ShippingStreet": "415 Mission St",
"SalesTransactionItem": [
  {
    "ProrationPolicy": null,
    "Discount": null,
    "ProductSellingModel": "0jPxx000000001dEAA",
    "Product": "01txx0000006jkuAAA",
    "businessObjectType": "QuoteLineItem",
    "BasisTransactionItem": null,
    "PartnerUnitPrice": null,
    "StartingUnitPriceSource": "System",
    "ListPrice": 150000,
    "ItemTotalAdjustmentAmount": 0,
    "SalesTransactionItemSource": "0QLxx0000004CQmGAM",
    "SubscriptionTerm": null,
    "StartDate": null,
    "NetTotalPrice": 150000,
    "TotalLineAmount": 150000,
    "PeriodBoundaryStartMonth": null,
    "ListPriceTotal": 150000,
    "PartnerDiscountPercent": null,
    "id": "0QLxx0000004CQmGAM",
    "PriceWaterFall": "{
      "currencyCode": "USD",
      "executionEndTimestamp": "2023-09-18T20:11:15.016Z",
      "executionId": "ruepwmHn2ZFvnQo5bjot",
      "executionStartTimestamp": "2023-09-18T20:11:14.906Z",
      "lineItemId": "0QLxx0000004CQmGAM",
      "output": {
        "NetUnitPrice": 150000.0,
        "Subtotal": 0.0
      },
      "success": true,
      "waterfall": [
        {
          "fieldToTagNameMapping": {
            "NetUnitPrice": "ItemUnitPrice",
            "AdjustmentValue": "ItemAdjustmentValue",
            "Subtotal": "ItemTotalAdjustmentAmount",
            "Quantity": "ItemQuantity",
            "LineItemId": "SalesTransactionItemSource",
            "InputUnitPrice": "ItemUnitPrice"
          },
          "inputParameters": {
            "Quantity": 1.0,
            "LineItemId": "0QLxx0000004CQmGAM",
            "InputUnitPrice": 150000.0,
            "AdjustmentType": "Amount"
          },
          "outputParameters": {

```

```

        "NetUnitPrice":150000.0,
        "Subtotal":0.0
    },
    "pricingElement":{
        "adjustments":[
            {
                "AdjustmentType":"Amount"
            }
        ],
        "elementType":"MANUALDISCOUNT",
        "name":"ManualDiscount"
    },
    "sequence":1
}
}],
"BillingFrequency": null,
"SalesTransactionItemParent": "0Q0xx0000004CAeCAM",
"StartingPriceTotal": 150000,
"Quantity": 1,
"PeriodBoundary": null,
"SalesTransactionItemAttribute": [
    {
        "AttributeKey": "0tjxx00000001H3AAI",
        "AttributeValue": "30.0",
        "AttributePicklistValue": null,
        "IsPriceImpacting": true,
        "businessObjectType": "QuoteLineItemAttribute",
        "AttributeName": "Expansion Slots",
        "AttributeDefinitionCode": "SLOTCAP",
        "id": "0zuxx0000000001AAA",
        "SalesTransactionItemAttrParent": "0QLxx0000004CQmGAM"
    }
],
"EndDate": null,
"DiscountAmount": null,
"PricebookEntry": "0luxx0000009154AAA",
"PricingTermCount": 1,
"NetUnitPrice": 150000,
"UnitPrice": 150000,
"StartingUnitPrice": 150000,
"SalesTrxnItemRelationship": [
    {
        "ProductRelationshipType": "0yoxx00000001IfAAI",
        "MainItemRole": "Bundle",
        "AssociatedItem": "0QLxx0000004CQnGAM",
        "ProductRelatedComponent": "0dSxx0000000001EAA",
        "MainItem": "0QLxx0000004CQmGAM",
        "AssociatedQuantScaleMethod": "Proportional",
        "businessObjectType": "QuoteLineRelationship",
        "AssociatedItemRole": "BundleComponent",
        "SalesTrnItemRelationshipParent": "0Q0xx0000004CAeCAM",
        "id": "0yQxx000000001dEAA",
        "AssociatedItemPricing": "NotIncludedInBundlePrice"
    }
]

```

```

    }
  ],
  "TotalPrice": 150000,
  "PeriodBoundaryDay": null
},
{
  "ProrationPolicy": null,
  "Discount": null,
  "ProductSellingModel": "0jPxx000000001dEAA",
  "Product": "01txx0000006jjIAAQ",
  "businessObjectType": "QuoteLineItem",
  "BasisTransactionItem": null,
  "PartnerUnitPrice": null,
  "StartingUnitPriceSource": "System",
  "ListPrice": 2000,
  "ItemTotalAdjustmentAmount": 0,
  "SalesTransactionItemSource": "0QLxx0000004CQnGAM",
  "SubscriptionTerm": null,
  "StartDate": null,
  "NetTotalPrice": 2000,
  "TotalLineAmount": 2000,
  "PeriodBoundaryStartMonth": null,
  "ListPriceTotal": 2000,
  "PartnerDiscountPercent": null,
  "id": "0QLxx0000004CQnGAM",
  "PriceWaterFall": "{
    "currencyCode": "USD",
    "executionEndTimestamp": "2023-09-18T20:11:15.016Z",
    "executionId": "ruepwmHn2ZFvnQo5bjot",
    "executionStartTimestamp": "2023-09-18T20:11:14.906Z",
    "lineItemId": "0QLxx0000004CQnGAM",
    "output": {
      "NetUnitPrice": 2000.0,
      "Subtotal": 0.0
    }
  },
  "success": true,
  "waterfall": [
    {
      "fieldToTagNameMapping": {
        "NetUnitPrice": "ItemUnitPrice",
        "AdjustmentValue": "ItemAdjustmentValue",
        "Subtotal": "ItemTotalAdjustmentAmount",
        "Quantity": "ItemQuantity",
        "LineItemId": "SalesTransactionItemSource",
        "InputUnitPrice": "ItemUnitPrice"
      }
    },
    "inputParameters": {
      "Quantity": 1.0,
      "LineItemId": "0QLxx0000004CQnGAM",
      "InputUnitPrice": 2000.0,
      "AdjustmentType": "Amount"
    }
  ],
  "outputParameters": {
    "NetUnitPrice": 2000.0,

```



```

        "Subtotal":0.0
      },
      "pricingElement":{
        "adjustments":[
          {}
        ],
        "elementType":"MANUALDISCOUNT",
        "name":"ManualDiscount"
      },
      "sequence":1
    }
  ]
  }",
  "BillingFrequency": null,
  "SalesTransactionItemParent": "0Q0xx0000004CAeCAM",
  "StartingPriceTotal": 2000,
  "Quantity": 1,
  "PeriodBoundary": null,
  "EndDate": null,
  "DiscountAmount": null,
  "PricebookEntry": "01luxx000000913SAAQ",
  "PricingTermCount": 1,
  "NetUnitPrice": 2000,
  "UnitPrice": 2000,
  "StartingUnitPrice": 2000,
  "TotalPrice": 2000,
  "PeriodBoundaryDay": null
}
],
"BillingCountry": "US",
"BillingStreet": "415 Mission St",
"Pricebook": "01sxx0000005uDZAAAY",
"ShippingPostalCode": "94105",
"SalesTransactionSource": "0Q0xx0000004CAeCAM",
"ShippingCountry": "US",
"ShippingCity": "San Francisco",
"ShippingState": "CA",
"BillingPostalCode": "94105",
"id": "0Q0xx0000004CAeCAM",
"BillToContact": null,
"Contract": null,
"BillingState": "CA"
}
]

```

Property Name	Type	Description	Filter Group and Version	Available Version
attribute CategoryId	String	ID of the attribute category.	Small, 60.0	60.0
attribute NameOverride	String	Name override value of the attribute.	Small, 60.0	60.0

Property Name	Type	Description	Filter Group and Version	Available Version
attribute Picklist	Configurator Attribute Picklist[]	Picklist values of the attribute.	Small, 60.0	60.0
code	String	Code of the attribute.	Small, 60.0	60.0
dataType	String	Data type of the attribute.	Small, 60.0	60.0
default HelpText	String	Default help text value of the attribute.	Small, 60.0	60.0
defaultValue	String	Default value of the attribute.	Small, 60.0	60.0
description	String	Description of the attribute.	Small, 60.0	60.0
displayType	String	Display type of the attribute.	Small, 60.0	60.0
id	String	ID of the attribute.	Small, 60.0	60.0
isCloneable	Boolean	Indicates if the attribute is cloneable (<code>true</code>) or not (<code>false</code>).	Small, 60.0	60.0
is Configurable	Boolean	Indicates if the attribute is configurable (<code>true</code>) or not (<code>false</code>).	Small, 60.0	60.0
isEncrypted	Boolean	Indicates if the attribute is encrypted (<code>true</code>) or not (<code>false</code>).	Small, 60.0	60.0
isHidden	Boolean	Indicates if the attribute is hidden (<code>true</code>) or not (<code>false</code>).	Small, 60.0	60.0
isPrice Impacting	Boolean	Indicates if this is a price impacting attribute (<code>true</code>) or not (<code>false</code>).	Small, 60.0	60.0
isReadOnly	Boolean	Indicates if the attribute is read-only (<code>true</code>) or not (<code>false</code>).	Small, 60.0	60.0
isRequired	Boolean	Indicates if the attribute is required (<code>true</code>) or not (<code>false</code>).	Small, 60.0	60.0
label	String	Label of the attribute.	Small, 60.0	60.0
maximumValue	String	Maximum value for the product attribute.	Small, 60.0	60.0
minimumValue	String	Minimum value for the product attribute.	Small, 60.0	60.0
name	String	Name of the attribute.	Small, 60.0	60.0
sequence	Integer	Sequence values of the attribute.	Small, 60.0	60.0
status	String	Status of the attribute.	Small, 60.0	60.0
stepValue	String	Step value for the attribute.	Small, 60.0	60.0
unitOfMeasure	Configurator Unit Of Measure[]	Details about the unit of measure associated with an attribute.	Small, 63.0	63.0

Property Name	Type	Description	Filter Group and Version	Available Version
userValue	String	User value of the attribute.	Small, 60.0	60.0
valueDecoder	String	Value decoder for the attribute.	Small, 60.0	60.0
value Description	String	Value description of the attribute.	Small, 60.0	60.0

Configurator Attribute Category

Output representation of the attribute category in a product configuration.

JSON example

```

"attributeCategories": [
  {
    "attributes": [
      {
        "attributeCategoryId": "0v3xx000000001AAA",
        "attributeNameOverride": "Load Capacity",
        "code": "CAP",
        "dataType": "NUMBER",
        "defaultValue": "1500",
        "description": "Server racks are designed to support a specific load capacity, commonly measured in kilograms (kg) or pounds (lbs). Typical load capacities range from 500 kg (1102 lbs) to 1500 kg (3307 lbs) depending on the model.",
        "id": "0tjxx00000001DpAAI",
        "isCloneable": false,
        "isConfigurable": true,
        "isHidden": false,
        "isPriceImpacting": false,
        "isReadOnly": false,
        "isRequired": false,
        "label": "Load Capacity",
        "name": "Load Capacity"
      },
      {
        "attributeCategoryId": "0v3xx000000001AAA",
        "attributeNameOverride": "Expansion Slots",
        "code": "SLOTCAP",
        "dataType": "NUMBER",
        "defaultValue": "12",
        "id": "0tjxx00000001H3AAI",
        "isCloneable": false,
        "isConfigurable": true,
        "isHidden": false,
        "isPriceImpacting": false,
        "isReadOnly": false,
        "isRequired": true,
        "label": "Expansion Slots",
        "name": "Expansion Slots"
      }
    ]
  }
]

```

```

    },
    {
      "attributeCategoryId": "0v3xx0000000001AAA",
      "attributeNameOverride": "Memory",
      "attributePicklist": {
        "id": "0v5xx0000000001AAA",
        "values": [
          {
            "code": "MEM",
            "displayValue": "25",
            "id": "0v6xx0000000001AAA",
            "isBooleanValue": false,
            "name": "25Mem",
            "sequence": 0,
            "textValue": "25"
          },
          {
            "code": "50MEM",
            "displayValue": "50",
            "id": "0v6xx000000001eAAA",
            "isBooleanValue": false,
            "name": "50Mem",
            "sequence": 1,
            "textValue": "50"
          },
          {
            "code": "100MEM",
            "displayValue": "100",
            "id": "0v6xx000000003FAAQ",
            "isBooleanValue": false,
            "name": "100Mem",
            "sequence": 2,
            "textValue": "100"
          }
        ]
      },
      "dataType": "MULTIPICKLIST",
      "defaultValue": "25",
      "id": "0tjxx00000001IfAAI",
      "isCloneable": false,
      "isConfigurable": true,
      "isHidden": false,
      "isPriceImpacting": false,
      "isReadOnly": false,
      "isRequired": true,
      "label": "Memory",
      "name": "Memory"
    }
  ],
  {
    "code": "SPEC",
    "name": "Server Rack Specifications"
  }
],
"description": "Introducing the Cisco Server Rack, a sleek and robust solution

```

```

designed to streamline your data center infrastructure. With its scalable design and
advanced cable management features, it ensures optimal performance, efficiency, and easy
maintenance for your critical network equipment.",
  "displayUrl":
"https://www.cisco.com/content/dam/en/us/products/servers-unified-computing/ucs-c240-m4-rack-server/product-large.jpg",

  "id": "01txx0000006jkuAAA",
  "isActive": true,
  "isAssetizable": true,
  "isConfigurable": true,
  "isSoldOnlyWithOtherProds": false,
  "name": "Cisco Server Rack NX44",
  "nodeType": "bundleProduct",
  "prices": [],
  "productClassification": {
    "id": "11Bxx000002CC02EAG"
  },
  "productCode": "RACK",
  "productComponentGroups": [
    {
      "classifications": [],
      "code": "SERVICE",
      "components": [
        {
          "additionalFields": [],
          "attributeCategories": [],
          "description": "Introducing the Cisco Rack Server NX44 Service, a
comprehensive protection plan designed to safeguard your valuable data infrastructure.
With extended coverage and rapid response times, this warranty ensures peace of mind
and uninterrupted performance for your critical business operations.",
          "id": "01txx0000006jmWAAQ",
          "isActive": true,
          "isAssetizable": true,
          "isComponentRequired": false,
          "isConfigurable": false,
          "isDefaultComponent": false,
          "isQuantityEditable": false,
          "isSoldOnlyWithOtherProds": false,
          "name": "Cisco Rack Server Service - 1 Year",
          "nodeType": "simpleProduct",
          "prices": [],
          "productClassification": {},
          "productCode": "SERVICE",
          "productComponentGroups": [],
          "productRelatedComponent": {
            "childProductId": "01txx0000006jmWAAQ",
            "childSellingModelId": "0jPxx000000004rEAA",
            "doesBundlePriceIncludeChild": true,
            "id": "0dSxx000000001dEAA",
            "isComponentRequired": false,
            "isDefaultComponent": false,
            "isQuantityEditable": false,
            "parentProductId": "01txx0000006jkuAAA",
            "parentSellingModelId": "0jPxx000000004rEAA",

```

```

        "productComponentGroupId": "0y7xx000000001dAAA",
        "productRelationshipTypeId": "0yoxx00000001IfAAI",
        "quantity": 1,
        "quantityScaleMethod": "Proportional"
    },
    "productSellingModelOptions": [
        {
            "id": "0iOxx000000009hEAA",
            "productId": "01txx0000006jmWAAQ",
            "productSellingModel": {
                "id": "0jPxx000000004rEAA",
                "name": "Termed Annually",
                "pricingTerm": 1,
                "pricingTermUnit": "Annual",
                "sellingModelType": "TermDefined",
                "status": "Active"
            },
            "productSellingModelId": "0jPxx000000004rEAA"
        },
        {
            "id": "0iOxx00000000PpEAI",
            "productId": "01txx0000006jmWAAQ",
            "productSellingModel": {
                "id": "0jPxx0000000085EAA",
                "name": "Evergreen Annually",
                "pricingTerm": 1,
                "pricingTermUnit": "Annual",
                "sellingModelType": "Evergreen",
                "status": "Active"
            },
            "productSellingModelId": "0jPxx0000000085EAA"
        }
    ]
}
],
"description": "The services available for the Cisco Server Rack NX44 product
provide comprehensive coverage and support for optimal performance and reliability,
ensuring peace of mind for your data center infrastructure.",
"id": "0y7xx000000001dAAA",
"maxBundleComponents": 1,
"minBundleComponents": 0,
"name": "Services",
"parentProductId": "01txx0000006jkuAAA",
"sequence": 1
},
{
    "classifications": [],
    "code": "WARRANTY",
    "components": [
        {
            "additionalFields": [],
            "attributeCategories": [],
            "description": "Introducing the Cisco Rack Server NX44 Warranty, a
comprehensive protection plan designed to safeguard your valuable data infrastructure.

```

With extended coverage and rapid response times, this warranty ensures peace of mind and uninterrupted performance for your critical business operations.",

```

    "id": "01txx0000006jjIAAQ",
    "isActive": true,
    "isAssetizable": true,
    "isComponentRequired": false,
    "isConfigurable": false,
    "isDefaultComponent": true,
    "isQuantityEditable": true,
    "isSoldOnlyWithOtherProds": false,
    "name": "Cisco Rack Server Warranty - 1 Year",
    "nodeType": "simpleProduct",
    "prices": [],
    "productClassification": {},
    "productCode": "WARRANTY",
    "productComponentGroups": [],
    "productRelatedComponent": {
      "childProductId": "01txx0000006jjIAAQ",
      "childSellingModelId": "0jPxx000000001dEAA",
      "doesBundlePriceIncludeChild": false,
      "id": "0dSxx0000000001EAA",
      "isComponentRequired": false,
      "isDefaultComponent": true,
      "isQuantityEditable": true,
      "maxQuantity": 1,
      "parentProductId": "01txx0000006jkuAAA",
      "parentSellingModelId": "0jPxx000000001dEAA",
      "productComponentGroupId": "0y7xx0000000001AAA",
      "productRelationshipTypeId": "0yoxx00000001IfAAI",
      "quantity": 1,
      "quantityScaleMethod": "Proportional",
      "sequence": 0
    },
    "productSellingModelOptions": [
      {
        "id": "0iOxx000000001dEAA",
        "productId": "01txx0000006jjIAAQ",
        "productSellingModel": {
          "id": "0jPxx000000001dEAA",
          "name": "One Time",
          "sellingModelType": "OneTime",
          "status": "Active"
        },
        "productSellingModelId": "0jPxx000000001dEAA"
      },
      {
        "id": "0iOxx00000000HlEAI",
        "productId": "01txx0000006jjIAAQ",
        "productSellingModel": {
          "id": "0jPxx000000003FEAQ",
          "name": "Termed Monthly",
          "pricingTerm": 1,
          "pricingTermUnit": "Months",
          "sellingModelType": "TermDefined",

```

```

        "status": "Active"
      },
      "productSellingModelId": "0jPxx000000003FEAQ"
    },
    {
      "id": "0iOxx00000000JNEAY",
      "productId": "01txx0000006jjIAAQ",
      "productSellingModel": {
        "id": "0jPxx000000004rEAA",
        "name": "Termed Annually",
        "pricingTerm": 1,
        "pricingTermUnit": "Annual",
        "sellingModelType": "TermDefined",
        "status": "Active"
      },
      "productSellingModelId": "0jPxx000000004rEAA"
    },
    {
      "id": "0iOxx00000000KzEAI",
      "productId": "01txx0000006jjIAAQ",
      "productSellingModel": {
        "id": "0jPxx0000000085EAA",
        "name": "Evergreen Annually",
        "pricingTerm": 1,
        "pricingTermUnit": "Annual",
        "sellingModelType": "Evergreen",
        "status": "Active"
      },
      "productSellingModelId": "0jPxx0000000085EAA"
    },
    {
      "id": "0iOxx00000000MbEAI",
      "productId": "01txx0000006jjIAAQ",
      "productSellingModel": {
        "id": "0jPxx000000006TEAQ",
        "name": "Evergreen Monthly",
        "pricingTerm": 1,
        "pricingTermUnit": "Months",
        "sellingModelType": "Evergreen",
        "status": "Active"
      },
      "productSellingModelId": "0jPxx000000006TEAQ"
    }
  ]
}
],
  "description": "The warranties available for the Cisco Server Rack NX44 product
provide comprehensive coverage and support for optimal performance and reliability,
ensuring peace of mind for your data center infrastructure.",
  "id": "0y7xx0000000001AAA",
  "maxBundleComponents": 1,
  "minBundleComponents": 0,
  "name": "Warranties",
  "parentProductId": "01txx0000006jkuAAA",

```



```

    "sequence": 0
  }
],
"productSellingModelOptions": [
  {
    "id": "0iOxx000000003FEAQ",
    "productId": "01txx0000006jkuAAA",
    "productSellingModel": {
      "id": "0jPxx000000001dEAA",
      "name": "One Time",
      "sellingModelType": "OneTime",
      "status": "Active"
    },
    "productSellingModelId": "0jPxx000000001dEAA"
  },
  {
    "id": "0iOxx000000004rEAA",
    "productId": "01txx0000006jkuAAA",
    "productSellingModel": {
      "id": "0jPxx000000003FEAQ",
      "name": "Termed Monthly",
      "pricingTerm": 1,
      "pricingTermUnit": "Months",
      "sellingModelType": "TermDefined",
      "status": "Active"
    },
    "productSellingModelId": "0jPxx000000003FEAQ"
  },
  {
    "id": "0iOxx000000006TEAQ",
    "productId": "01txx0000006jkuAAA",
    "productSellingModel": {
      "id": "0jPxx000000004rEAA",
      "name": "Termed Annually",
      "pricingTerm": 1,
      "pricingTermUnit": "Annual",
      "sellingModelType": "TermDefined",
      "status": "Active"
    },
    "productSellingModelId": "0jPxx000000004rEAA"
  }
],
"productType": "Bundle"
},
"errors": [],
"success": true,
"transactionContext": {
  "SalesTransaction": [
    {
      "Status": "Draft",
      "Account": "001xx000003GeIxAAK",
      "BillingCity": "San Francisco",
      "Subtotal": 152500,
      "LastPricedDate": "2023-08-22T05:55:39Z",

```

```

"businessObjectType": "Quote",
"TotalAmount": 152500,
"ShippingStreet": "415 Mission St",
"SalesTransactionItem": [
  {
    "ProrationPolicy": null,
    "Discount": null,
    "ProductSellingModel": "0jPxx000000001dEAA",
    "Product": "01txx0000006jkuAAA",
    "businessObjectType": "QuoteLineItem",
    "BasisTransactionItem": null,
    "PartnerUnitPrice": null,
    "StartingUnitPriceSource": "System",
    "ListPrice": 150000,
    "ItemTotalAdjustmentAmount": 0,
    "SalesTransactionItemSource": "0QLxx0000004CQmGAM",
    "SubscriptionTerm": null,
    "StartDate": null,
    "NetTotalPrice": 150000,
    "TotalLineAmount": 150000,
    "PeriodBoundaryStartMonth": null,
    "ListPriceTotal": 150000,
    "PartnerDiscountPercent": null,
    "id": "0QLxx0000004CQmGAM",
    "PriceWaterFall": "{
      "currencyCode": "USD",
      "executionEndTimestamp": "2023-09-18T20:11:15.016Z",
      "executionId": "ruepwmHn2ZFvnQo5bjot",
      "executionStartTimestamp": "2023-09-18T20:11:14.906Z",
      "lineItemId": "0QLxx0000004CQmGAM",
      "output": {
        "NetUnitPrice": 150000.0,
        "Subtotal": 0.0
      },
      "success": true,
      "waterfall": [
        {
          "fieldToTagNameMapping": {
            "NetUnitPrice": "ItemUnitPrice",
            "AdjustmentValue": "ItemAdjustmentValue",
            "Subtotal": "ItemTotalAdjustmentAmount",
            "Quantity": "ItemQuantity",
            "LineItemId": "SalesTransactionItemSource",
            "InputUnitPrice": "ItemUnitPrice"
          },
          "inputParameters": {
            "Quantity": 1.0,
            "LineItemId": "0QLxx0000004CQmGAM",
            "InputUnitPrice": 150000.0,
            "AdjustmentType": "Amount"
          },
          "outputParameters": {
            "NetUnitPrice": 150000.0,
            "Subtotal": 0.0
          }
        }
      ]
    }
  }
]

```

```

    },
    "pricingElement":{
      "adjustments":[
        {
          "AdjustmentType":"Amount"
        }
      ],
      "elementType":"MANUALDISCOUNT",
      "name":"ManualDiscount"
    },
    "sequence":1
  }
]
}]",
"BillingFrequency": null,
"SalesTransactionItemParent": "0Q0xx0000004CAeCAM",
"StartingPriceTotal": 150000,
"Quantity": 1,
"PeriodBoundary": null,
"SalesTransactionItemAttribute": [
  {
    "AttributeKey": "0tjxx00000001H3AAI",
    "AttributeValue": "30.0",
    "AttributePicklistValue": null,
    "IsPriceImpacting": true,
    "businessObjectType": "QuoteLineItemAttribute",
    "AttributeName": "Expansion Slots",
    "AttributeDefinitionCode": "SLOTCAP",
    "id": "0zuxx0000000001AAA",
    "SalesTransactionItemAttrParent": "0QLxx0000004CQmGAM"
  }
],
"EndDate": null,
"DiscountAmount": null,
"PricebookEntry": "0luxx0000009154AAA",
"PricingTermCount": 1,
"NetUnitPrice": 150000,
"UnitPrice": 150000,
"StartingUnitPrice": 150000,
"SalesTrxnItemRelationship": [
  {
    "ProductRelationshipType": "0yoxx00000001IfAAI",
    "MainItemRole": "Bundle",
    "AssociatedItem": "0QLxx0000004CQnGAM",
    "ProductRelatedComponent": "0dSxx0000000001EAA",
    "MainItem": "0QLxx0000004CQmGAM",
    "AssociatedQuantScaleMethod": "Proportional",
    "businessObjectType": "QuoteLineRelationship",
    "AssociatedItemRole": "BundleComponent",
    "SalesTrnItemRelationshipParent": "0Q0xx0000004CAeCAM",
    "id": "0yQxx000000001dEAA",
    "AssociatedItemPricing": "NotIncludedInBundlePrice"
  }
]
],

```

```

    "TotalPrice": 150000,
    "PeriodBoundaryDay": null
  },
  {
    "ProrationPolicy": null,
    "Discount": null,
    "ProductSellingModel": "0jPxx000000001dEAA",
    "Product": "01txx0000006jjIAAQ",
    "businessObjectType": "QuoteLineItem",
    "BasisTransactionItem": null,
    "PartnerUnitPrice": null,
    "StartingUnitPriceSource": "System",
    "ListPrice": 2000,
    "ItemTotalAdjustmentAmount": 0,
    "SalesTransactionItemSource": "0QLxx0000004CQnGAM",
    "SubscriptionTerm": null,
    "StartDate": null,
    "NetTotalPrice": 2000,
    "TotalLineAmount": 2000,
    "PeriodBoundaryStartMonth": null,
    "ListPriceTotal": 2000,
    "PartnerDiscountPercent": null,
    "id": "0QLxx0000004CQnGAM",
    "PriceWaterFall": "{
      "currencyCode": "USD",
      "executionEndTimestamp": "023-09-18T20:11:15.016Z",
      "executionId": "ruepwmHn2ZFvnQo5bjot",
      "executionStartTimestamp": "2023-09-18T20:11:14.906Z",
      "lineItemId": "0QLxx0000004CQnGAM",
      "output": {
        "NetUnitPrice": 2000.0,
        "Subtotal": 0.0
      }
    },
    "success": true,
    "waterfall": [
      {
        "fieldToTagNameMapping": {
          "NetUnitPrice": "ItemUnitPrice",
          "AdjustmentValue": "ItemAdjustmentValue",
          "Subtotal": "ItemTotalAdjustmentAmount",
          "Quantity": "ItemQuantity",
          "LineItemId": "SalesTransactionItemSource",
          "InputUnitPrice": "ItemUnitPrice"
        }
      },
      "inputParameters": {
        "Quantity": 1.0,
        "LineItemId": "0QLxx0000004CQnGAM",
        "InputUnitPrice": 2000.0,
        "AdjustmentType": "Amount"
      }
    },
    "outputParameters": {
      "NetUnitPrice": 2000.0,
      "Subtotal": 0.0
    }
  },

```

```

    "pricingElement":{
      "adjustments":[
        {}
      ],
      "elementType":"MANUALDISCOUNT",
      "name":"ManualDiscount"
    },
    "sequence":1
  }
]
}
",
"BillingFrequency": null,
"SalesTransactionItemParent": "0Q0xx0000004CAeCAM",
"StartingPriceTotal": 2000,
"Quantity": 1,
"PeriodBoundary": null,
"EndDate": null,
"DiscountAmount": null,
"PricebookEntry": "01luxx000000913SAAQ",
"PricingTermCount": 1,
"NetUnitPrice": 2000,
"UnitPrice": 2000,
"StartingUnitPrice": 2000,
"TotalPrice": 2000,
"PeriodBoundaryDay": null
}
],
"BillingCountry": "US",
"BillingStreet": "415 Mission St",
"Pricebook": "01sxx0000005uDZAAAY",
"ShippingPostalCode": "94105",
"SalesTransactionSource": "0Q0xx0000004CAeCAM",
"ShippingCountry": "US",
"ShippingCity": "San Francisco",
"ShippingState": "CA",
"BillingPostalCode": "94105",
"id": "0Q0xx0000004CAeCAM",
"BillToContact": null,
"Contract": null,
"BillingState": "CA"
}
]

```

Property Name	Type	Description	Filter Group and Version	Available Version
attributes	Configurator Attribute[]	Attributes of the attribute category.	Small, 60.0	60.0
code	String	Code of the attribute category.	Small, 60.0	60.0
description	String	Description of the attribute category.	Small, 60.0	60.0
id	String	ID of the attribute category.	Small, 60.0	60.0

Property Name	Type	Description	Filter Group and Version	Available Version
name	String	Name of the attribute category.	Small, 60.0	60.0
status	String	Status of the attribute category.	Small, 60.0	60.0
totalSize	Integer	Total size of the attribute category.	Small, 60.0	60.0
usageType	String	Usage type of the attribute category.	Small, 60.0	60.0

Configurator Attribute Picklist

Output representation of the attribute picklist in a product configuration.

Property Name	Type	Description	Filter Group and Version	Available Version
description	String	Description of the attribute picklist.	Small, 60.0	60.0
id	String	ID of the attribute picklist.	Small, 60.0	60.0
name	String	Name of the attribute picklist.	Small, 60.0	60.0
status	String	Status of the attribute picklist.	Small, 60.0	60.0
values	Configurator Attribute Picklist Value[]	Values of the attribute picklist.	Small, 60.0	60.0

Configurator Attribute Picklist Value

Output representation of the values of an attribute picklist in a product configuration.

Property Name	Type	Description	Filter Group and Version	Available Version
code	String	Code of the attribute value.	Small, 60.0	60.0
description	String	Description of the attribute value.	Small, 60.0	60.0
displayValue	String	Display value of the attribute value.	Small, 60.0	60.0
id	String	ID of the attribute value.	Small, 60.0	60.0
isBoolean Value	Boolean	Indicates if this attribute value is a boolean value (<code>true</code>) or not (<code>false</code>).	Small, 60.0	60.0
label	String	Label of the attribute value.	Small, 60.0	60.0
name	String	Name of the attribute value.	Small, 60.0	60.0
sequence	Integer	Sequence of the attribute value.	Small, 60.0	60.0
status	String	Status of the attribute value.	Small, 60.0	60.0

Property Name	Type	Description	Filter Group and Version	Available Version
textValue	String	Text value of the attribute value.	Small, 60.0	60.0

Configurator Delete Nodes

Output representation of the details of the configuration request to delete nodes.

JSON Example

```
{
  "configuratorMessages": {},
  "configuratorUITreatments": [
    {
      "details": {
        "attributeId": "0tjxx0000000007AAA",
        "prcId": "0dSxx0000000007EAA",
        "stiId": "0QLxx0000004CU0GAM",
        "attributePicklistValueId": "0v6xx0000000005AAA"
      },
      "uiTreatmentScope": "Bundle",
      "uiTreatmentTarget": "Attribute_Picklist_Value",
      "uiTreatmentType": "Hide"
    },
    {
      "details": {
        "stiId": "ref_f0f2da7b_c431_482d_bf4b_599052f3a2e1"
      },
      "uiTreatmentScope": "Product",
      "uiTreatmentTarget": "Component",
      "uiTreatmentType": "Disable"
    }
  ],
  "errors": [],
  "productQualifications": {
    "01tDU000000EOTCYA4": {
      "isQualified": true
    }
  },
  "success": true
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
configurator Messages	Map<String, Configurator Message >	Map of the product IDs to the list of configurator messages. Configurator messages are results from any validations, Business Rules Engine (BRE) calls, or Salesforce Pricing calls.	Small, 60.0	60.0

Property Name	Type	Description	Filter Group and Version	Available Version
configuratorUITreatments	Configurator UI Treatment[]	Details of the UI treatments that specify the product configuration rule actions to override the disable or hide behavior in the UI for product options, product attributes, and attribute picklist values.	Small, 62.0	62.0
errors	Error Response	List of errors, which contains an error code and a message.	Small, 60.0	60.0
productQualifications	Map<String, Configurator Qualification Context >	Map of the product IDs to the qualification rule execution results.	Small, 60.0	60.0
success	Boolean	Indicates whether the call was successful (<code>true</code>) not (<code>false</code>).	Small, 60.0	60.0

Configurator Message

Output representation of the messages of a product configurator.

Property Name	Type	Description	Filter Group and Version	Available Version
category	String	Category or type of the error message. Valid values are: <ul style="list-style-type: none"> <code>ArcResolutionService</code> <code>ArcValidationService</code> <code>BundleValidation</code> <code>ConfigurationRules</code> <code>Pricing</code> 	Small, 60.0	60.0
message	String	Message that contains the error details.	Small, 60.0	60.0
messageType	String	Type of error message. Valid values are: <ul style="list-style-type: none"> <code>Error</code> <code>Info</code> <code>Warning</code> 	Small, 60.0	60.0
primaryRecordId	String	Primary record ID that contains the error.	Small, 60.0	60.0
relatedRecordId	String	Related record ID for the error, if any.	Small, 60.0	60.0

Configurator Price

Output representation of the pricing details in a product configuration.

Property Name	Type	Description	Filter Group and Version	Available Version
currency IsoCode	String	Currency ISO code of the price book entry.	Small, 60.0	60.0
effectiveFrom	String	Date from when the price book entry is effective.	Small, 60.0	60.0
effectiveTo	String	Date until when the price book entry is effective.	Small, 60.0	60.0
isDefault	Boolean	Indicates if this price book entry is the default pricing model (<code>true</code>) or not (<code>false</code>).	Small, 60.0	60.0
isSelected	Boolean	Indicates if this price book entry is selected (<code>true</code>) or not (<code>false</code>).	Small, 60.0	60.0
pricebook EntryId	String	ID of the price book entry.	Small, 60.0	60.0
pricebookId	String	Pricebook2 ID of the price book entry.	Small, 60.0	60.0
pricingModel	Configurator Pricing Model[]	Pricing model details of the price book entry.	Small, 60.0	60.0
unitPrice	Double	Unit price of the price book entry.	Small, 60.0	60.0

Configurator Pricing Model

Output representation of the details of a pricing model in a product configuration.

Property Name	Type	Description	Filter Group and Version	Available Version
frequency	String	Frequency of the pricing model.	Small, 60.0	60.0
id	String	ID of the pricing model.	Small, 60.0	60.0
name	String	Name of the pricing model.	Small, 60.0	60.0
occurrence	Integer	Occurrence of the pricing model.	Small, 60.0	60.0
pricing ModelType	String	Type of the pricing model.	Small, 60.0	60.0
unitOfMeasure	String	Unit of measure for the pricing model.	Small, 60.0	60.0

Configurator Product Catalog

Output representation of the product catalog.

JSON example

```

"catalogProducts": {
  "additionalFields": [],
  "attributeCategories": [
    {
      "attributes": [
        {
          "attributeCategoryId": "0v3xx000000001AAA",
          "attributeNameOverride": "Load Capacity",
          "code": "CAP",
          "dataType": "NUMBER",
          "defaultValue": "1500",
          "description": "Server racks are designed to support a specific load capacity, commonly measured in kilograms (kg) or pounds (lbs). Typical load capacities range from 500 kg (1102 lbs) to 1500 kg (3307 lbs) depending on the model.",
          "id": "0tjxx00000001DpAAI",
          "isCloneable": false,
          "isConfigurable": true,
          "isHidden": false,
          "isPriceImpacting": false,
          "isReadOnly": false,
          "isRequired": false,
          "label": "Load Capacity",
          "name": "Load Capacity"
        },
        {
          "attributeCategoryId": "0v3xx000000001AAA",
          "attributeNameOverride": "Expansion Slots",
          "code": "SLOTCAP",
          "dataType": "NUMBER",
          "defaultValue": "12",
          "id": "0tjxx00000001H3AAI",
          "isCloneable": false,
          "isConfigurable": true,
          "isHidden": false,
          "isPriceImpacting": false,
          "isReadOnly": false,
          "isRequired": true,
          "label": "Expansion Slots",
          "name": "Expansion Slots"
        },
        {
          "attributeCategoryId": "0v3xx000000001AAA",
          "attributeNameOverride": "Memory",
          "attributePicklist": {
            "id": "0v5xx000000001AAA",
            "values": [
              {
                "code": "MEM",

```

```

        "displayValue": "25",
        "id": "0v6xx000000001AAA",
        "isBooleanValue": false,
        "name": "25Mem",
        "sequence": 0,
        "textValue": "25"
    },
    {
        "code": "50MEM",
        "displayValue": "50",
        "id": "0v6xx000000001eAAA",
        "isBooleanValue": false,
        "name": "50Mem",
        "sequence": 1,
        "textValue": "50"
    },
    {
        "code": "100MEM",
        "displayValue": "100",
        "id": "0v6xx000000003FAAQ",
        "isBooleanValue": false,
        "name": "100Mem",
        "sequence": 2,
        "textValue": "100"
    }
]
},
"dataType": "MULTIPICKLIST",
"defaultValue": "25",
"id": "0tjxx00000001IfAAI",
"isCloneable": false,
"isConfigurable": true,
"isHidden": false,
"isPriceImpacting": false,
"isReadOnly": false,
"isRequired": true,
"label": "Memory",
"name": "Memory"
}
],
"code": "SPEC",
"name": "Server Rack Specifications"
}
],
"description": "Introducing the Cisco Server Rack, a sleek and robust solution designed to streamline your data center infrastructure. With its scalable design and advanced cable management features, it ensures optimal performance, efficiency, and easy maintenance for your critical network equipment.",
"displayUrl":
"https://www.cisco.com/content/dam/en/us/products/servers-unified-computing/ucs-c240-m4-rack-server/product-large.jpg",
"id": "01txx0000006jkuAAA",
"isActive": true,
"isAssetizable": true,

```

```

    "isConfigurable": true,
    "isSoldOnlyWithOtherProds": false,
    "name": "Cisco Server Rack NX44",
    "nodeType": "bundleProduct",
    "prices": [],
    "productClassification": {
      "id": "11Bxx000002CC02EAG"
    },
    "productCode": "RACK",
    "productComponentGroups": [
      {
        "classifications": [],
        "code": "SERVICE",
        "components": [
          {
            "additionalFields": [],
            "attributeCategories": [],
            "description": "Introducing the Cisco Rack Server NX44 Service, a
comprehensive protection plan designed to safeguard your valuable data infrastructure.
With extended coverage and rapid response times, this warranty ensures peace of mind
and uninterrupted performance for your critical business operations.",
            "id": "01txx0000006jmWAAQ",
            "isActive": true,
            "isAssetizable": true,
            "isComponentRequired": false,
            "isConfigurable": false,
            "isDefaultComponent": false,
            "isQuantityEditable": false,
            "isSoldOnlyWithOtherProds": false,
            "name": "Cisco Rack Server Service - 1 Year",
            "nodeType": "simpleProduct",
            "prices": [],
            "productClassification": {},
            "productCode": "SERVICE",
            "productComponentGroups": [],
            "productRelatedComponent": {
              "childProductId": "01txx0000006jmWAAQ",
              "childSellingModelId": "0jPxx000000004rEAA",
              "doesBundlePriceIncludeChild": true,
              "id": "0dSxx000000001dEAA",
              "isComponentRequired": false,
              "isDefaultComponent": false,
              "isQuantityEditable": false,
              "parentProductId": "01txx0000006jkuAAA",
              "parentSellingModelId": "0jPxx000000004rEAA",
              "productComponentGroupId": "0y7xx000000001dAAA",
              "productRelationshipTypeId": "0yoxx00000001IfAAI",
              "quantity": 1,
              "quantityScaleMethod": "Proportional"
            },
            "productSellingModelOptions": [
              {
                "id": "0iOxx000000009hEAA",
                "productId": "01txx0000006jmWAAQ",

```

```

        "productSellingModel": {
          "id": "0jPxx000000004rEAA",
          "name": "Termed Annually",
          "pricingTerm": 1,
          "pricingTermUnit": "Annual",
          "sellingModelType": "TermDefined",
          "status": "Active"
        },
        "productSellingModelId": "0jPxx000000004rEAA"
      },
      {
        "id": "0iOxx00000000PpEAI",
        "productId": "01txx0000006jmWAAQ",
        "productSellingModel": {
          "id": "0jPxx0000000085EAA",
          "name": "Evergreen Annually",
          "pricingTerm": 1,
          "pricingTermUnit": "Annual",
          "sellingModelType": "Evergreen",
          "status": "Active"
        },
        "productSellingModelId": "0jPxx0000000085EAA"
      }
    ]
  }
},
"description": "The services available for the Cisco Server Rack NX44 product
provide comprehensive coverage and support for optimal performance and reliability,
ensuring peace of mind for your data center infrastructure.",
"id": "0y7xx000000001dAAA",
"maxBundleComponents": 1,
"minBundleComponents": 0,
"name": "Services",
"parentProductId": "01txx0000006jkuAAA",
"sequence": 1
},
{
  "classifications": [],
  "code": "WARRANTY",
  "components": [
    {
      "additionalFields": [],
      "attributeCategories": [],
      "description": "Introducing the Cisco Rack Server NX44 Warranty, a
comprehensive protection plan designed to safeguard your valuable data infrastructure.
With extended coverage and rapid response times, this warranty ensures peace of mind
and uninterrupted performance for your critical business operations.",
      "id": "01txx0000006jjIAAQ",
      "isActive": true,
      "isAssetizable": true,
      "isComponentRequired": false,
      "isConfigurable": false,
      "isDefaultComponent": true,
      "isQuantityEditable": true,

```

```

"isSoldOnlyWithOtherProds": false,
"name": "Cisco Rack Server Warranty - 1 Year",
"nodeType": "simpleProduct",
"prices": [],
"productClassification": {},
"productCode": "WARRANTY",
"productComponentGroups": [],
"productRelatedComponent": {
  "childProductId": "01txx0000006jjIAAQ",
  "childSellingModelId": "0jPxx000000001dEAA",
  "doesBundlePriceIncludeChild": false,
  "id": "0dSxx0000000001EAA",
  "isComponentRequired": false,
  "isDefaultComponent": true,
  "isQuantityEditable": true,
  "maxQuantity": 1,
  "parentProductId": "01txx0000006jkuAAA",
  "parentSellingModelId": "0jPxx000000001dEAA",
  "productComponentGroupId": "0y7xx0000000001AAA",
  "productRelationshipTypeId": "0yoxx00000001IfAAI",
  "quantity": 1,
  "quantityScaleMethod": "Proportional",
  "sequence": 0
},
"productSellingModelOptions": [
  {
    "id": "0iOxx000000001dEAA",
    "productId": "01txx0000006jjIAAQ",
    "productSellingModel": {
      "id": "0jPxx000000001dEAA",
      "name": "One Time",
      "sellingModelType": "OneTime",
      "status": "Active"
    },
    "productSellingModelId": "0jPxx000000001dEAA"
  },
  {
    "id": "0iOxx00000000H1EAI",
    "productId": "01txx0000006jjIAAQ",
    "productSellingModel": {
      "id": "0jPxx000000003FEAQ",
      "name": "Termed Monthly",
      "pricingTerm": 1,
      "pricingTermUnit": "Months",
      "sellingModelType": "TermDefined",
      "status": "Active"
    },
    "productSellingModelId": "0jPxx000000003FEAQ"
  },
  {
    "id": "0iOxx00000000JNEAY",
    "productId": "01txx0000006jjIAAQ",
    "productSellingModel": {
      "id": "0jPxx000000004rEAA",

```

```

        "name": "Termed Annually",
        "pricingTerm": 1,
        "pricingTermUnit": "Annual",
        "sellingModelType": "TermDefined",
        "status": "Active"
    },
    "productSellingModelId": "0jPxx000000004rEAA"
},
{
    "id": "0iOxx00000000KzEAI",
    "productId": "01txx0000006jjIAAQ",
    "productSellingModel": {
        "id": "0jPxx0000000085EAA",
        "name": "Evergreen Annually",
        "pricingTerm": 1,
        "pricingTermUnit": "Annual",
        "sellingModelType": "Evergreen",
        "status": "Active"
    },
    "productSellingModelId": "0jPxx0000000085EAA"
},
{
    "id": "0iOxx00000000MbEAI",
    "productId": "01txx0000006jjIAAQ",
    "productSellingModel": {
        "id": "0jPxx000000006TEAQ",
        "name": "Evergreen Monthly",
        "pricingTerm": 1,
        "pricingTermUnit": "Months",
        "sellingModelType": "Evergreen",
        "status": "Active"
    },
    "productSellingModelId": "0jPxx000000006TEAQ"
}
]
}
],
"description": "The warranties available for the Cisco Server Rack NX44 product
provide comprehensive coverage and support for optimal performance and reliability,
ensuring peace of mind for your data center infrastructure.",
    "id": "0y7xx0000000001AAA",
    "maxBundleComponents": 1,
    "minBundleComponents": 0,
    "name": "Warranties",
    "parentProductId": "01txx0000006jkuAAA",
    "sequence": 0
}
],
"productSellingModelOptions": [
    {
        "id": "0iOxx000000003FEAQ",
        "productId": "01txx0000006jkuAAA",
        "productSellingModel": {
            "id": "0jPxx000000001dEAA",

```

```

    "name": "One Time",
    "sellingModelType": "OneTime",
    "status": "Active"
  },
  "productSellingModelId": "0jPxx000000001dEAA"
},
{
  "id": "0iOxx000000004rEAA",
  "productId": "01txx0000006jkuAAA",
  "productSellingModel": {
    "id": "0jPxx000000003FEAQ",
    "name": "Termed Monthly",
    "pricingTerm": 1,
    "pricingTermUnit": "Months",
    "sellingModelType": "TermDefined",
    "status": "Active"
  },
  "productSellingModelId": "0jPxx000000003FEAQ"
},
{
  "id": "0iOxx000000006TEAQ",
  "productId": "01txx0000006jkuAAA",
  "productSellingModel": {
    "id": "0jPxx000000004rEAA",
    "name": "Termed Annually",
    "pricingTerm": 1,
    "pricingTermUnit": "Annual",
    "sellingModelType": "TermDefined",
    "status": "Active"
  },
  "productSellingModelId": "0jPxx000000004rEAA"
}
],
"productType": "Bundle"
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
additional Fields	Configurator Additional Fields[]	Additional fields for this product.	Small, 60.0	60.0
attribute Categories	Configurator Attribute Category[]	List of attribute categories. The categories that aren't categorized are specified in the uncategorized entry in this list.	Small, 60.0	60.0
availability Date	String	Availability date of this product.	Small, 60.0	60.0
description	String	Description of this product.	Small, 60.0	60.0
discontinued Date	String	Date when this product is discontinued.	Small, 60.0	60.0
displayUrl	String	Display URL of this product.	Small, 60.0	60.0

Property Name	Type	Description	Filter Group and Version	Available Version
endOfLifeDate	String	End of life date for this product.	Small, 60.0	60.0
id	String	ID of the product.	Small, 60.0	60.0
isActive	Boolean	Indicates whether this product is active (<code>true</code>) or not (<code>false</code>).	Small, 60.0	60.0
isAssetizable	Boolean	Indicates whether this product is assetizable (<code>true</code>) or not (<code>false</code>).	Small, 60.0	60.0
isComponent Required	Boolean	Indicates whether the component is required (<code>true</code>) or not (<code>false</code>).	Small, 60.0	60.0
isConfigurable	Boolean	Indicates whether the component is configurable (<code>true</code>) or not (<code>false</code>).	Small, 60.0	60.0
isDefault Component	Boolean	Indicates whether the component is a default component (<code>true</code>) or not (<code>false</code>).	Small, 60.0	60.0
isQuantity Editable	Boolean	Indicates whether the quantity of the component is editable (<code>true</code>) or not (<code>false</code>).	Small, 60.0	60.0
isSoldOnly WithOtherProds	Boolean	Indicates whether this product is sold only with other products (<code>true</code>) or not (<code>false</code>).	Small, 60.0	60.0
name	String	Name of the product.	Small, 60.0	60.0
nodeType	String	Node type of the product.	Small, 60.0	60.0
prices	Configurator Price[]	List of prices from the product catalog.	Small, 60.0	60.0
product Classification	Configurator Product Classification[]	Classification details of the product.	Small, 60.0	60.0
productCode	String	Code of the product.	Small, 60.0	60.0
product ComponentGroups	Configurator Product Component Group[]	List of product component groups for this product.	Small, 60.0	60.0
product RelatedComponent	Configurator Product Related Component[]	Details of the product related component of this product.	Small, 60.0	60.0
productSelling ModelOptions	Configurator Product Selling Model Option[]	List of product selling model options for this product.	Small, 60.0	60.0
productType	String	Type of product.	Small, 60.0	60.0
qualification Context	Configurator Qualification Context[]	Details of the qualification context of the product.	Small, 60.0	60.0

Property Name	Type	Description	Filter Group and Version	Available Version
status	String	Status of the product.	Small, 60.0	60.0
unitOfMeasure	Configurator Unit Of Measure[]	Details about the unit of measure associated with a product.	Small, 63.0	63.0

Configurator Product Classification

Output representation of the product classification in a product configuration.

JSON example

```
"productClassification": {
  "id": "11Bxx000002CC02EAG"
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
id	String	ID of the product classification.	Small, 60.0	60.0

Configurator Product Component Group

Output representation of the product component group in a product classification.

JSON example

```
"productComponentGroups": [
  {
    "classifications": [],
    "code": "SERVICE",
    "components": [
      {
        "additionalFields": [],
        "attributeCategories": [],
        "description": "Introducing the Cisco Rack Server NX44 Service, a comprehensive protection plan designed to safeguard your valuable data infrastructure. With extended coverage and rapid response times, this warranty ensures peace of mind and uninterrupted performance for your critical business operations.",
        "id": "01txx0000006jmWAAQ",
        "isActive": true,
        "isAssetizable": true,
        "isComponentRequired": false,
        "isConfigurable": false,
        "isDefaultComponent": false,
        "isQuantityEditable": false,
        "isSoldOnlyWithOtherProds": false,
        "name": "Cisco Rack Server Service - 1 Year",
        "nodeType": "simpleProduct",

```

```

    "prices": [],
    "productClassification": {},
    "productCode": "SERVICE",
    "productComponentGroups": [],
    "productRelatedComponent": {
      "childProductId": "01txx0000006jmWAAQ",
      "childSellingModelId": "0jPxx000000004rEAA",
      "doesBundlePriceIncludeChild": true,
      "id": "0dSxx000000001dEAA",
      "isComponentRequired": false,
      "isDefaultComponent": false,
      "isQuantityEditable": false,
      "parentProductId": "01txx0000006jkuAAA",
      "parentSellingModelId": "0jPxx000000004rEAA",
      "productComponentGroupId": "0y7xx000000001dAAA",
      "productRelationshipTypeId": "0yoxx00000001IfAAI",
      "quantity": 1,
      "quantityScaleMethod": "Proportional"
    },
    "productSellingModelOptions": [
      {
        "id": "0iOxx000000009hEAA",
        "productId": "01txx0000006jmWAAQ",
        "productSellingModel": {
          "id": "0jPxx000000004rEAA",
          "name": "Termed Annually",
          "pricingTerm": 1,
          "pricingTermUnit": "Annual",
          "sellingModelType": "TermDefined",
          "status": "Active"
        },
        "productSellingModelId": "0jPxx000000004rEAA"
      },
      {
        "id": "0iOxx00000000PpEAI",
        "productId": "01txx0000006jmWAAQ",
        "productSellingModel": {
          "id": "0jPxx0000000085EAA",
          "name": "Evergreen Annually",
          "pricingTerm": 1,
          "pricingTermUnit": "Annual",
          "sellingModelType": "Evergreen",
          "status": "Active"
        },
        "productSellingModelId": "0jPxx0000000085EAA"
      }
    ]
  },
  "description": "The services available for the Cisco Server Rack NX44 product
provide comprehensive coverage and support for optimal performance and reliability,
ensuring peace of mind for your data center infrastructure.",
  "id": "0y7xx000000001dAAA",
  "maxBundleComponents": 1,

```

```

    "minBundleComponents": 0,
    "name": "Services",
    "parentProductId": "01txx0000006jkuAAA",
    "sequence": 1
  },
  {
    "classifications": [],
    "code": "WARRANTY",
    "components": [
      {
        "additionalFields": [],
        "attributeCategories": [],
        "description": "Introducing the Cisco Rack Server NX44 Warranty, a
comprehensive protection plan designed to safeguard your valuable data infrastructure.
With extended coverage and rapid response times, this warranty ensures peace of mind
and uninterrupted performance for your critical business operations.",
        "id": "01txx0000006jjIAAQ",
        "isActive": true,
        "isAssetizable": true,
        "isComponentRequired": false,
        "isConfigurable": false,
        "isDefaultComponent": true,
        "isQuantityEditable": true,
        "isSoldOnlyWithOtherProds": false,
        "name": "Cisco Rack Server Warranty - 1 Year",
        "nodeType": "simpleProduct",
        "prices": [],
        "productClassification": {},
        "productCode": "WARRANTY",
        "productComponentGroups": [],
        "productRelatedComponent": {
          "childProductId": "01txx0000006jjIAAQ",
          "childSellingModelId": "0jPxx000000001dEAA",
          "doesBundlePriceIncludeChild": false,
          "id": "0dSxx0000000001EAA",
          "isComponentRequired": false,
          "isDefaultComponent": true,
          "isQuantityEditable": true,
          "maxQuantity": 1,
          "parentProductId": "01txx0000006jkuAAA",
          "parentSellingModelId": "0jPxx000000001dEAA",
          "productComponentGroupId": "0y7xx0000000001AAA",
          "productRelationshipTypeId": "0yoxxx00000001IfAAI",
          "quantity": 1,
          "quantityScaleMethod": "Proportional",
          "sequence": 0
        },
      },
      {
        "productSellingModelOptions": [
          {
            "id": "0iOxx000000001dEAA",
            "productId": "01txx0000006jjIAAQ",
            "productSellingModel": {
              "id": "0jPxx000000001dEAA",
              "name": "One Time",
            }
          }
        ]
      }
    ]
  }

```

```

        "sellingModelType": "OneTime",
        "status": "Active"
    },
    "productSellingModelId": "0jPxx000000001dEAA"
},
{
    "id": "0iOxx00000000HlEAI",
    "productId": "01txx0000006jjIAAQ",
    "productSellingModel": {
        "id": "0jPxx000000003FEAQ",
        "name": "Termed Monthly",
        "pricingTerm": 1,
        "pricingTermUnit": "Months",
        "sellingModelType": "TermDefined",
        "status": "Active"
    },
    "productSellingModelId": "0jPxx000000003FEAQ"
},
{
    "id": "0iOxx00000000JNEAY",
    "productId": "01txx0000006jjIAAQ",
    "productSellingModel": {
        "id": "0jPxx000000004rEAA",
        "name": "Termed Annually",
        "pricingTerm": 1,
        "pricingTermUnit": "Annual",
        "sellingModelType": "TermDefined",
        "status": "Active"
    },
    "productSellingModelId": "0jPxx000000004rEAA"
},
{
    "id": "0iOxx00000000KzEAI",
    "productId": "01txx0000006jjIAAQ",
    "productSellingModel": {
        "id": "0jPxx0000000085EAA",
        "name": "Evergreen Annually",
        "pricingTerm": 1,
        "pricingTermUnit": "Annual",
        "sellingModelType": "Evergreen",
        "status": "Active"
    },
    "productSellingModelId": "0jPxx0000000085EAA"
},
{
    "id": "0iOxx00000000MbEAI",
    "productId": "01txx0000006jjIAAQ",
    "productSellingModel": {
        "id": "0jPxx000000006TEAQ",
        "name": "Evergreen Monthly",
        "pricingTerm": 1,
        "pricingTermUnit": "Months",
        "sellingModelType": "Evergreen",
        "status": "Active"
    }
}

```

```

        },
        "productSellingModelId": "0jPxx000000006TEAQ"
    }
]
}
],
"description": "The warranties available for the Cisco Server Rack NX44 product
provide comprehensive coverage and support for optimal performance and reliability,
ensuring peace of mind for your data center infrastructure.",
"id": "0y7xx0000000001AAA",
"maxBundleComponents": 1,
"minBundleComponents": 0,
"name": "Warranties",
"parentProductId": "01txx0000006jkuAAA",
"sequence": 0
}
]

```

Property Name	Type	Description	Filter Group and Version	Available Version
classifications	Configurator Product Classification[]	List of classifications for this product component group.	Small, 60.0	60.0
code	String	Code of the product component group.	Small, 60.0	60.0
components	Configurator Product Catalog[]	Components within the product component group.	Small, 60.0	60.0
description	String	Description of the product component group.	Small, 60.0	60.0
id	String	ID of the product component group.	Small, 60.0	60.0
maxBundleComponents	Integer	Maximum number of bundle components within the product component group.	Small, 60.0	60.0
minBundleComponents	Integer	Minimum number of bundle components within the product component group.	Small, 60.0	60.0
name	String	Name of the product component group.	Small, 60.0	60.0
parentProductId	String	Parent Product2 ID of the product component group.	Small, 60.0	60.0
sequence	Integer	Sequence of the product component group.	Small, 60.0	60.0

Configurator Product Recommendations

Output representation of the details of the product recommendations.

JSON Example

```

{
  "productRecommendations": [

```

```

{
  "referenceId": "CORE_BUNDLE_001",
  "productIds": [
    "01t000000001234",
    "01t000000005678"
  ]
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
productIds	String[]	List of recommended product IDs.	Small, 65.0	65.0
referenceId	String	Reference ID for the recommendation.	Small, 65.0	65.0

Configurator Product Related Component

Output representation of the product related component in a product configuration.

JSON example

```

"productRelatedComponent": {
  "childProductId": "01txx0000006jmWAAQ",
  "childSellingModelId": "0jPxx000000004rEAA",
  "doesBundlePriceIncludeChild": true,
  "id": "0dSxx000000001dEAA",
  "isComponentRequired": false,
  "isDefaultComponent": false,
  "isQuantityEditable": false,
  "parentProductId": "01txx0000006jkuAAA",
  "parentSellingModelId": "0jPxx000000004rEAA",
  "productComponentGroupId": "0y7xx000000001dAAA",
  "productRelationshipTypeId": "0yoxx00000001IfAAI",
  "quantity": 1,
  "quantityScaleMethod": "Proportional",
  "quoteVisibility": "Quote Document Only"
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
child ProductId	String	ID of the child product in the bundle.	Small, 60.0	60.0
childSelling ModelId	String	ID of the child product selling model record.	Small, 60.0	60.0
doesBundle Price IncludeChild	Boolean	Indicates whether the price of the bundle includes the child product (<code>true</code>) or not (<code>false</code>).	Small, 60.0	60.0

Property Name	Type	Description	Filter Group and Version	Available Version
id	String	ID of the product related component.	Small, 60.0	60.0
isComponent Required	Boolean	Indicates whether the component is required in the bundle (<code>true</code>) or not (<code>false</code>).	Small, 60.0	60.0
isDefault Component	Boolean	Indicates whether to select the component in the bundle group by default (<code>true</code>) or not (<code>false</code>).	Small, 60.0	60.0
isQuantity Editable	Boolean	Indicates whether to allow changes to the quantity of the component in the bundle (<code>true</code>) or not (<code>false</code>).	Small, 60.0	60.0
maxQuantity	Double	Maximum quantity of the product in the opportunity, quote, or order line item.	Small, 60.0	60.0
minQuantity	Double	Minimum quantity of the product in the opportunity, quote, or order line item.	Small, 60.0	60.0
parent ProductId	String	ID of the parent product.	Small, 60.0	60.0
parentSelling ModelId	String	ID of the parent product selling model record.	Small, 60.0	60.0
product Classification Id	String	ID of the product classification record.	Small, 60.0	60.0
product Component GroupId	String	ID of the product component group.	Small, 60.0	60.0
product Relationship TypeId	String	ID of the product relationship type record.	Small, 60.0	60.0
quantity	Double	Quantity of the child products.	Small, 60.0	60.0
quantityScale Method	String	Method to scale the quantity of the child product in relation to the quantity of the parent. Valid values are: <ul style="list-style-type: none"> • <code>Constant</code> • <code>Proportional</code> 	Small, 60.0	60.0
quote Visibility	String	Specifies whether a quote line item must be shown on the transaction line editor or quote document. Valid values are: <ul style="list-style-type: none"> • <code>Always</code> 	Small, 64.0	64.0

Property Name	Type	Description	Filter Group and Version	Available Version
		<ul style="list-style-type: none"> Transaction Line Editor Only—Specifies whether to show a quote line item on quote editor only. Quote Document Only—Specifies whether to show a quote line item on quote proposal only. Never <p>The API returns this property only if the CoreCPQ permission set is available.</p>		
sequence	Integer	Order in which the child products are displayed.	Small, 60.0	60.0

Configurator Product Selling Model

Output representation of the product selling model in a product configuration.

JSON example

```

"productSellingModel": {
  "id": "0jPxx000000085EAA",
  "name": "Evergreen Annually",
  "pricingTerm": 1,
  "pricingTermUnit": "Annual",
  "sellingModelType": "Evergreen",
  "status": "Active"
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
id	String	ID of the product selling model.	Small, 60.0	60.0
name	String	Name of the product selling model.	Small, 60.0	60.0
pricingTerm	Integer	Pricing term of the product selling model.	Small, 60.0	60.0
pricingTermUnit	String	Pricing term unit of the product selling model.	Small, 60.0	60.0
sellingModelType	String	Selling model type of the product selling model.	Small, 60.0	60.0
status	String	Status of the product selling model.	Small, 60.0	60.0

Configurator Product Selling Model Option

Output representation of the product selling model option in a product configuration.

JSON example

```

"productSellingModelOptions": [
  {
    "id": "0iOxx00000009hEAA",
    "productId": "01txx0000006jmWAAQ",
    "productSellingModel": {
      "id": "0jPxx000000004rEAA",
      "name": "Termed Annually",
      "pricingTerm": 1,
      "pricingTermUnit": "Annual",
      "sellingModelType": "TermDefined",
      "status": "Active"
    },
    "productSellingModelId": "0jPxx000000004rEAA"
  },
  {
    "id": "0iOxx00000000PpEAI",
    "productId": "01txx0000006jmWAAQ",
    "productSellingModel": {
      "id": "0jPxx0000000085EAA",
      "name": "Evergreen Annually",
      "pricingTerm": 1,
      "pricingTermUnit": "Annual",
      "sellingModelType": "Evergreen",
      "status": "Active"
    },
    "productSellingModelId": "0jPxx0000000085EAA"
  }
]

```

Property Name	Type	Description	Filter Group and Version	Available Version
id	String	ID of the product selling model option.	Small, 60.0	60.0
productId	String	ID of the product that's associated with the product selling model option.	Small, 60.0	60.0
productSellingModel	Configurator Product Selling Model[]	Product selling model that's associated with the product selling model option.	Small, 60.0	60.0
productSellingModelId	String	ID of the product selling model that's associated with the product selling model option.	Small, 60.0	60.0

Configurator Qualification Context

Output representation of the qualification context in a product configuration.

Property Name	Type	Description	Filter Group and Version	Available Version
isQualified	Boolean	Indicates whether the product is qualified (true) or not (false).	Small, 60.0	60.0
reason	String	Reason for the qualification of this product.	Small, 60.0	60.0

Configurator UI Treatment

Output representation of the details of the UI treatments of a product configurator. The details include the product configuration rule actions to override the disable or hide behavior in the UI for product options, product attributes, and attribute picklist values.

JSON Example

```
[
  {
    "details": {
      "attributeId": "0tjxx0000000007AAA",
      "prcId": "0dSxx0000000007EAA",
      "stiId": "0QLxx0000004CU0GAM",
      "attributePicklistValueId": "0v6xx0000000005AAA"
    },
    "uiTreatmentScope": "Bundle",
    "uiTreatmentTarget": "Attribute_Picklist_Value",
    "uiTreatmentType": "Hide"
  },
  {
    "details": {
      "stiId": "ref_f0f2da7b_c431_482d_bf4b_599052f3a2e1"
    },
    "uiTreatmentScope": "Product",
    "uiTreatmentTarget": "Component",
    "uiTreatmentType": "Disable"
  }
]
```

Property Name	Type	Description	Filter Group and Version	Available Version
details	Map<String, Object>	Key-value pair that specifies the items to apply the rules on, which includes these details. <ul style="list-style-type: none"> ID of the sales transaction item ID of the product-related component ID of the attribute ID of the attribute picklist value 	Small, 62.0	62.0
uiTreatment Scope	String	Type of the UI treatment to be performed. Valid values are:	Small, 62.0	62.0

Property Name	Type	Description	Filter Group and Version	Available Version
		<ul style="list-style-type: none"> <code>Product</code>—UI treatment is applicable to a certain product only. <code>Bundle</code>—UI treatment is applicable to the whole bundle. 		
<code>uiTreatmentTarget</code>	String	Target of the UI treatment. Valid values are: <ul style="list-style-type: none"> <code>Component</code>—Represents a product option or bundle component. <code>Quantity</code>—Represents a quantity field. <code>Attribute</code>—Represents a certain attribute of the product. <code>Attribute_Picklist_Value</code>—Represents one of the picklist values of a product attribute. 	Small, 62.0	62.0
<code>uiTreatmentType</code>	String	Type of UI treatment to be performed. Valid values are: <ul style="list-style-type: none"> <code>Hide</code>—Hide the associated target. <code>Disable</code>—Disable the associated target. 	Small, 62.0	62.0

Configurator Unit Of Measure

Output representation of the details of the unit of measure record.

JSON Example

```
{
  "unitOfMeasure": {
    "id": "0hEXR00000000BJ2AY",
    "name": "Litres",
    "roundingMethod": "Down",
    "scale": 2,
    "unitCode": "Ltrs"
  }
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
<code>id</code>	String	ID of the unit of measure record.	Small, 63.0	63.0
<code>name</code>	String	Name of the unit of measure record.	Small, 63.0	63.0

Property Name	Type	Description	Filter Group and Version	Available Version
rounding Method	String	Rounding method associated with the unit of measure record.	Small, 63.0	63.0
scale	Integer	Scale associated with the unit of measure record.	Small, 63.0	63.0
unitCode	String	Unit code associated with the unit of measure record.	Small, 63.0	63.0

Configurator Update Nodes

Output representation of the configuration request details to update nodes.

JSON Example

```
{
  "configuratorMessages": {},
  "configuratorUITreatments": [
    {
      "details": {
        "attributeId": "0tjxx0000000007AAA",
        "prcId": "0dSxx0000000007EAA",
        "stiId": "0QLxx0000004CU0GAM",
        "attributePicklistValueId": "0v6xx0000000005AAA"
      },
      "uiTreatmentScope": "Bundle",
      "uiTreatmentTarget": "Attribute_Picklist_Value",
      "uiTreatmentType": "Hide"
    },
    {
      "details": {
        "stiId": "ref_f0f2da7b_c431_482d_bf4b_599052f3a2e1"
      },
      "uiTreatmentScope": "Product",
      "uiTreatmentTarget": "Component",
      "uiTreatmentType": "Disable"
    }
  ],
  "errors": [],
  "productQualifications": {
    "01tDU000000EOTCYA4": {
      "isQualified": true
    }
  },
  "success": true
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
configurator Messages	Map<String, Configurator Message>	Map of the product IDs to the list of configurator messages. Configurator messages are results from any validations, Business Rules Engines (BRE) calls, or Salesforce Pricing calls.	Small, 60.0	60.0
configurator UITreatments	Configurator UITreatment[]	Details of the UI treatments that specify the product configuration rule actions to override the disable or hide behavior in the UI for product options, product attributes, and attribute picklist values.	Small, 62.0	62.0
errors	Error Response	List of errors, which contains an error code and a message.	Small, 60.0	60.0
product Qualifications	Map<String, Configurator Qualification Context>	Map of the product IDs to the qualification rule execution results.	Small, 60.0	60.0
success	Boolean	Indicates whether the call was successful (<code>true</code>) not (<code>false</code>).	Small, 60.0	60.0

Configuration Update

Output representation of the details of the updated configuration.

JSON example

This example shows a sample when the update operation is successful.

```
{
  "errors": [],
  "success": true
}
```

This example shows a sample when the update operation has errors.

```
{
  "errors": [
    {
      "code": "INTERNAL_SERVER_ERROR",
      "message": "INVALID_REFERENCEOBJECTID"
    }
  ],
  "success": false
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
errors	Error Response	List of errors that contains a message and an error code.	Small, 63.0	63.0
success	Boolean	Indicates whether the update operation is successful (<code>true</code>) or not (<code>false</code>)	Small, 63.0	63.0

Error Response

Output representation of the details of the error.

JSON example

```
{
  "errors": [
    {
      "code": "BAD_REQUEST",
      "message": "MISSING_REFERENCEOBJECTID"
    }
  ]
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
code	String	Code of the error.	Small, 63.0	63.0
message	String	Description of the error.	Small, 63.0	63.0

Product Quantity Set Configurator

Output representation of the request details to set product quantity.

JSON Example

```
{
  "configuratorMessages": {},
  "configuratorUITreatments": [
    {
      "details": {
        "attributeId": "0tjxx0000000007AAA",
        "prcId": "0dSxx0000000007EAA",
        "stiId": "0QLxx0000004CU0GAM",
        "attributePicklistValueId": "0v6xx0000000005AAA"
      },
      "uiTreatmentScope": "Bundle",
      "uiTreatmentTarget": "Attribute_Picklist_Value",
      "uiTreatmentType": "Hide"
    },
    {
      "details": {
```

```

    "stiId": "ref_f0f2da7b_c431_482d_bf4b_599052f3a2e1"
  },
  "uiTreatmentScope": "Product",
  "uiTreatmentTarget": "Component",
  "uiTreatmentType": "Disable"
}
],
"errors": [],
"productQualifications": {
  "01tDU000000EOTCYA4": {
    "isQualified": true
  }
},
"success": true
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
configurator Messages	Map<String, Configurator Message >	Map of the product IDs to the list of configurator messages. Configurator messages are results from any validations, Business Rules Engines (BRE) calls, or Salesforce Pricing calls.	Small, 60.0	60.0
configurator UITreatments	Configurator UI Treatment []	Details of the UI treatments that specify the product configuration rule actions to override the disable or hide behavior in the UI for product options, product attributes, and attribute picklist values.	Small, 62.0	62.0
errors	Error Response	List of errors, which contains an error code and a message.	Small, 60.0	60.0
product Qualifications	Map<String, Configurator Qualification Context >	Map of the product IDs to the qualification rule execution results.	Small, 60.0	60.0
success	Boolean	Indicates whether the call was successful (<code>true</code>) not (<code>false</code>).	Small, 60.0	60.0

Product Configurator Standard Invocable Actions

Learn more about the standard invocable actions available with Product Configurator.

[Run Config Rules Action](#)

Run rules for a specific quote or order based on a context ID or transaction ID, and process other steps that are part of the configuration directly within a Flow. This action decouples rule execution from configurations to enable independent execution of rules and for easier retrieval of responses.

SEE ALSO:

[Actions Developer Guide: Overview](#)

[REST API Developer Guide: Invocable Actions Standard](#)

Run Config Rules Action

Run rules for a specific quote or order based on a context ID or transaction ID, and process other steps that are part of the configuration directly within a Flow. This action decouples rule execution from configurations to enable independent execution of rules and for easier retrieval of responses.

This action is available in API version 65.0 and later.

Supported REST HTTP Methods

URI

`/services/data/v65.0/actions/standard/runConfigRules`

Formats

JSON, XML

HTTP Methods

POST

Authentication

Authorization: Bearer *token*

Inputs

Input	Details
transactionContextId	<p>Type</p> <p>string</p> <p>Description</p> <p>Unique identifier for the transaction context.</p>
transactionId	<p>Type</p> <p>string</p> <p>Description</p> <p>Required.</p> <p>Unique identifier for the transaction.</p>

Outputs

Output	Details
configRuleResult	<p>Type</p> <p>Apex-defined</p> <p>Description</p> <p>An <code>runtime_industries_cpq.ConfigRuleResult</code> record that contains the configuration rule execution results including validation messages, product recommendations, visibility rules, and errors from rule processing.</p>
transactionContextId	<p>Type</p> <p>string</p> <p>Description</p> <p>Unique identifier for the transaction context.</p>

Example

POST

This example shows a sample request to run rules for the specified quote based on the transaction context ID and transaction ID.

```
{
  "inputs": [
    {
      "transactionContextId": "008d27d7-e004-4906-a949-ee7d7c323c77",
      "transactionId": "0Q0DU0000005tJh0AI"
    }
  ]
}
```

This example shows a sample successful response.

```
[
  {
    "actionName": "runConfigRules",
    "errors": null,
    "invocationId": null,
    "isSuccess": true,
    "outcome": null,
    "outputValues": {
      "transactionContextId":
"0000000p18dq18g0029175793402786243c3d5ea94c241f09c11388ac1b865f9",
      "configRuleResult": {
        "visibilityRules": [
          {
            "stiId": "0QLxx0000004CU0GAM",
            "prcId": "PRC1",
            "attributeId": "Color",
            "attributePicklistValueId": "Red",

```

```

        "target": "Attribute",
        "scope": "Product",
        "type": "Hide"
    },
    {
        "stiId": "0QLxx0000004CU0GAM",
        "prcId": "PRC2",
        "attributeId": "Size",
        "attributePicklistValueId": "Large",
        "target": "Attribute",
        "scope": "Bundle",
        "type": "Disable"
    }
],
"transactionContextId":
"0000000p18dq18g0029175793402786243c3d5ea94c241f09c11388ac1b865f9",
"productRecommendationRules": [
    {
        "referenceId": "CORE_BUNDLE_001",
        "productIds": [
            "01t000000001234",
            "01t000000005678"
        ]
    }
],
"messageRules": [
    {
        "stiId": "0QLxx0000004CU0GAM",
        "severity": "INFO",
        "messages": [
            "Product configuration validated successfully"
        ]
    },
    {
        "stiId": "0QLxx0000004CU0GAM",
        "severity": "INFO",
        "messages": [
            "All required attributes are configured"
        ]
    },
    {
        "stiId": "0QLxx0000004CU0GAM",
        "severity": "INFO",
        "messages": [
            "Bundle compatibility check passed"
        ]
    }
],
"errors": []
}
},
"sortOrder": -1,
"version": 1

```

```
}  
]
```

Here's a sample input to call this invocable action by using `transactionContextId` property from Apex code.

```
// Create the invocable action with namespace  
Invocable.Action action = Invocable.Action.createStandardAction('runConfigRules');  
  
// Set input parameters using setInvocationParameter  
String contextId = '008d27d7-e004-4906-a949-ee7d7c323c77';  
System.debug('Setting transactionContextId parameter with value: ' + contextId);  
  
// Use the exact parameter name format from the debug output  
action.setInvocationParameter('transactionContextId', contextId);  
  
// Debug the action parameters  
System.debug('Action parameters: ' + action);  
  
// Execute the action  
System.debug('Invoking action...');  
List<Invocable.Action.Result> results = action.invoke();  
  
System.debug('Number of results: ' + results.size());
```

Product Configurator Metadata API Types

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

[Flow for Product Configurator](#)

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.

[ProductConfiguratorSettings](#)

Represents the settings for Product Configurator.

SEE ALSO:

[Metadata API Developer Guide: Understanding Metadata API](#)

Flow for Product Configurator

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

FlowActionCall

Product Configurator exposes additional `actionType` values for the `FlowActionCall` Metadata type.

Field Name	Field Type	Description
<code>actionType</code>	InvokableActionType (enumeration of type string)	<p>Required.</p> <p>The action type. Additional valid values only for Product Configurator include:</p> <ul style="list-style-type: none"> <code>runConfigRules</code>—Run rules for a specific quote or order based on a context ID or transaction ID, and process other steps that are part of the configuration directly within a Flow. This action decouples rule execution from configurations to enable independent execution of rules and for easier retrieval of responses.

ProductConfiguratorSettings

Represents the settings for Product Configurator.

Parent Type and Manifest Access

This type extends the [Metadata](#) metadata type and inherits its `fullName` field.

In the package manifest, all the settings metadata types for the org are accessed using the “Settings” name. See [Settings](#) for more details.

File Suffix and Directory Location

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

Version

`ProductConfiguratorSettings` components are available in API version 60.0 and later.

Fields

Field Name	Description
<code>enableProductConfigurator</code>	<p>Field Type boolean</p> <p>Description Indicates whether to enable Product Configurator at run time to customize product components and attributes during the sales process (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>

Declarative Metadata Sample Definition

Here's an example of a ProductConfiguratorSettings component.

```
<?xml version="1.0" encoding="UTF-8"?>
<ProductConfiguratorSettings xmlns="http://soap.sforce.com/2006/04/metadata">
  <enableProductConfigurator>true</enableProductConfigurator>
</ProductConfiguratorSettings>
```

Here's 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>ProductConfigurator</members>
    <name>Settings</name>
  </types>
  <version>65.0</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](#).

CHAPTER 7 Transaction Management

In this chapter ...

- [Transaction Management Standard Objects](#)
- [Transaction Management Fields on Standard Objects](#)
- [Transaction Management Tooling API Objects](#)
- [Transaction Management Platform Event](#)
- [Transaction Management Business APIs](#)
- [Transaction Management Apex Reference](#)
- [Transaction Management Standard Invocable Actions](#)
- [Transaction Management Metadata API Types](#)

Configure, price, and sell products with Transaction Management in Revenue Cloud. Transaction Management supports subscription lifecycles and ensures end-to-end integrity of your quotes and orders.

SEE ALSO:

[Salesforce Help: Permissions for Quote and Order Capture](#)

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions of Revenue Cloud where Transaction Management is enabled

Transaction Management Standard Objects

The Transaction Management data model provides objects and fields to manage transactions.

[Asset](#)

Represents an item of commercial value, such as a product sold by your company or a competitor, that a customer has purchased.

[AssetAction](#)

Represents a change made to a lifecycle-managed asset. The fields can't be edited. This object is available in API version 50.0 and later.

[AssetActionSource](#)

Represents an optional way to record what transactions caused changes to lifecycle-managed assets. Use it to trace financial and other information about asset actions. This object supports Salesforce order products and work order line items, and transaction IDs from other systems. The fields can't be edited. This object is available in API version 50.0 and later.

[AssetContractRelationship](#)

Represents a relationship between an asset and a contract. This object is available in API version 60.0 and later.

[AssetDowntimePeriod](#)

Represents a period during which an asset is not able to perform as expected. Downtime periods include planned activities, such as maintenance, and unplanned events, such as mechanical breakdown. This object is available in API version 49.0 and later.

[AssetOwnerSharingRule](#)

Represents the rules for sharing an Asset with users other than the owner. This object is available in API version 33.0 and later.

[AssetRateCardEntry](#)

Stores the negotiated rate card entries that are associated with an asset in Revenue Cloud. This object is available in API version 62.0 and later.

[AssetRelationship](#)

Represents a non-hierarchical relationship between assets due to an asset modification; for example, a replacement, upgrade, or other circumstance. In Subscription Management and Revenue Lifecycle Management, this object represents an asset or assets grouped in a bundle or set. This object is available in API version 41.0 and later.

[AssetShare](#)

Represents a sharing entry on an Asset. This object is available in API version 33.0 and later.

[AssetStatePeriod](#)

Represents a time span when an asset has the same quantity, amount, and monthly recurring revenue (MRR). An asset has as many asset state periods as there are changes to it (asset actions) during its lifecycle. The dashboard and related pages show the current asset state period. The fields can't be edited. This object is available in API version 50.0 and later.

[AssetStatePeriodAttribute](#)

Represents a virtual object that holds the key-value pair of the asset attribute in a specified asset state period. This object is a child object of AssetStatePeriod. This object is available in API version 60.0 and later.

[AssetTag](#)

Associates a word or short phrase with an Asset.

[AssetTokenEvent](#)

The documentation has moved to [AssetTokenEvent](#) in the *Platform Events Developer Guide*.

[AssetWarranty](#)

Defines the warranty terms applicable to an asset along with any exclusions and extensions. This object is available in API version 50.0 and later.

[ApprovalSubmission](#)

Represents the instance of an approval request that's submitted for a record of the related object. This object is available in API version 62.0 and later.

[BindingObjUsageRsrcPlcy](#)

Represents the policies that are used for the usage resource that's associated with an asset or a binding object. This object is available in API version 65.0 and later.

[ContractItemPrice](#)

Represents an object that's used to capture a price for a product on a contract. This object is available in API version 61.0 and later.

[ContractItemPriceAdjTier](#)

Represents the tiers of a price adjustment to a product on a contract. This object is available in API version 63.0 and later.

[ContractItemPriceHistory](#)

Represents the history of changes to the values in the fields of a ContractItemPrice object. This object is available in API version 61.0 and later.

[OrderDeliveryMethod](#)

Shows the customizations and options that a buyer selected for their delivery method. This object is available in API version 48.0 and later.

[OrderItemAttribute](#)

Represents a virtual object that stores an attribute specified for an order item. This object is available in API version 60.0 and later.

[OrderItemDetail](#)

Represents the breakdown details of an order product. Revenue Cloud generates these records to capture pricing and quantity changes, such as negative quantity reductions, early renewals, derived pricing or repricing during an amendment, and bundle or product attribute reconfigurations. This object is available in API version 60.0 and later.

[OrderItemRateAdjustment](#)

Represents the negotiated rate adjustment for an order product. This object is available in API version 62.0 and later.

[OrderItemRateCardEntry](#)

Represents the catalog and negotiated rates of a usage metric associated with an order item that's used to charge overage consumption. This object is available in API version 62.0 and later.

[OrderItemUsageRsrcGrant](#)

Represents the negotiated grants for the usage resource that's associated with the usage product added in the order item. This object is available in API version 65.0 and later.

[OrderItemUsageRsrcPlcy](#)

Represents the policies that are used for the usage resource that's associated with the usage product added in the order item. This object is available in API version 65.0 and later.

[SalesTransactionType](#)

Represents the type of the sales transaction. This object is available in API version 61.0 and later.

[QuoteAction](#)

Indicates the type of sales transaction that's being quoted; for example, a renewal sale. This object is available in API version 59.0 and later.

[QuoteLineDetail](#)

Represents the breakdown details of a quote line item. Revenue Cloud generates these records to capture pricing and quantity changes, such as negative quantity reductions, early renewals, derived pricing or repricing during an amendment, and bundle or product attribute reconfigurations. This object is available in API version 60.0 and later.

[QuoteLineGroup](#)

Stores the group information for line items in a quote. It also stores the aggregated line field information (subtotal). It contains a parent-child relationship to quote. This object is available in API version 61.0 and later.

[QuoteLineItemAttribute](#)

Represents a virtual object that stores an attribute specified for a quote line item. This object is available in API version 59.0 and later.

[QuoteLineItemUseRsrcGrant](#)

Represents the negotiated grants for the usage resource that's associated with the usage product added in the quote line item. This object is available in API version 65.0 and later.

[QuoteLineItemUsageRsrcPlcy](#)

Represents the policies that are used for the usage resource that's associated with the usage product added in the quote line item. This object is available in API version 65.0 and later.

[QuoteLineRateAdjustment](#)

Represents the negotiated rate adjustment for a quote line item. This object is available in API version 62.0 and later.

[QuoteLineRateCardEntry](#)

Represents the catalog and negotiated rates of a usage resource associated with a quote line item that's used to charge overage consumption. This object is available in API version 62.0 and later.

SEE ALSO:

[Object Reference for the Salesforce Platform: Overview of Salesforce Objects and Fields](#)

[SOAP API Developer Guide: Introduction to SOAP API](#)

Asset

Represents an item of commercial value, such as a product sold by your company or a competitor, that a customer has purchased.

Supported Calls

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

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description (Required) ID of the Account associated with this asset. Must be a valid account ID. Required if <code>ContactId</code> isn't specified.</p> <p>This field is a relationship field.</p> <p>Relationship Name Account</p> <p>Relationship Type Lookup</p> <p>Refers To Account</p>
Address	<p>Type address</p> <p>Properties Filter, Nillable</p> <p>Description Represents the physical address or geolocation of the asset.</p>
AssetLevel	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The asset's position in an asset hierarchy. If the asset has no parent or child assets, its level is 1. Assets that belong to a hierarchy have a level of 1 for the root asset, 2 for the child assets of the root asset, 3 for their children, and so forth. On assets created before the introduction of this field, the asset level defaults to -1. After the asset record is updated, the asset level is calculated and automatically updated.</p>
AssetProvidedById	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The account that provided the asset, typically a manufacturer.</p> <p>This field is a relationship field.</p> <p>Relationship Name AssetProvidedBy</p> <p>Relationship Type Lookup</p>

Field	Details
	<p>Refers To Account</p>
AssetServicedById	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The account in charge of servicing the asset. This field is a relationship field.</p> <p>Relationship Name AssetServicedBy</p> <p>Relationship Type Lookup</p> <p>Refers To Account</p>
AssetTypeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The asset type associated with the asset. This field is a relationship field. This field is available in API version 62.0 and later for users with the Health Cloud Appointment Management permission set.</p> <p>Relationship Name AssetType</p> <p>Relationship Type Lookup</p> <p>Refers To AssetType</p>
Availability	<p>Type percent</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The percentage of expected uptime where the asset was available for use.</p>

Field	Details
Averagetimetorepair	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Represents the number of hours it typically takes to repair an asset after a failure.</p>
Averagetimebetweenfailure	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Represents the number of hours that typically elapses before the asset is likely to fail again.</p>
Averageuptimeperday	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The average number of hours per day the asset is expected to be available for use.</p>
City	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The city detail for the address.</p>
ConsequenceofFailure	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The business impact associated with the asset's failure. Using this field, you can address the asset's health and take action using Flows. To enable this field, use Object Manager to update the field availability. Make sure that the field is visible for field-level security and for page layout. To learn more, see What Determines Field Access. The picklist values aren't predefined in orgs created before Winter '22 that aren't Field Service enabled. This field is available in API version 53.0 and later.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Insignificant

Field	Details
	<ul style="list-style-type: none"> • Minor • Moderate • Major • Critical
ContactId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Required if AccountId isn't specified. ID of the Contact associated with this asset. Must be a valid contact ID that has an account parent (but doesn't need to match the asset's AccountId). This field is a relationship field.</p> <p>Relationship Name Contact</p> <p>Relationship Type Lookup</p> <p>Refers To Contact</p>
Country	<p>Type String</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The country detail for the address.</p>
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Three-letter ISO 4217 currency code associated with the invoice. The default value is USD. This field is available in API version 55.0 and later. This field is available when CPQ Plus, Salesforce Billing, or Subscription Management is enabled.</p>
CurrentAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	<p>Description Reserved for future use.</p> <p>This field is available in API version 50.0 and later. This field is available when CPQ Plus, Salesforce Billing, or Subscription Management is enabled.</p>
CurrentLifecycleEndDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Represents the end of the period shown as current. System-populated field inherited from the end date of the current asset state period. If that field is empty, as with an evergreen subscription, the Current Lifecycle End Date field is also empty.</p> <p>This field is available in API version 50.0 and later. This field is available when CPQ Plus, Salesforce Billing, or Subscription Management is enabled.</p>
CurrentMrr	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The asset's monthly recurring revenue during the current asset state period. System-populated field inherited from the monthly recurring revenue on the current asset state period. If no asset state period is current, the value is 0. Label is Current Monthly Recurring Revenue.</p> <p>This field is available in API version 50.0 and later. This field is available when CPQ Plus, Salesforce Billing, or Subscription Management is enabled.</p>
CurrentQuantity	<p>Type double</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The asset's quantity during the current asset state period. System-populated field inherited from the quantity on the current asset state period. If no asset state period is current, the value is 0.</p> <p>This field is available in API version 50.0 and later. This field is available when CPQ Plus, Salesforce Billing, or Subscription Management is enabled.</p>
Description	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p>

Field	Details
	<p>Description Description of the asset.</p>
DigitalAssetStatus	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Status of digital tracking of the asset. The default picklist includes the following values:</p> <ul style="list-style-type: none"> • On • Off • Warning • Error
ExternalIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the matching record in an external system. This field is available in API version 49.0 and later.</p>
GeocodeAccuracy	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Accuracy level of the geocode for the address.</p>
HasLifecycleManagement	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description True if this asset is a lifecycle-managed asset, otherwise false. You can't switch an asset to a lifecycle-managed asset or the reverse. This field is system populated. The default value is <i>false</i>. This field is available in API version 50.0 and later. This field is available when CPQ Plus, Salesforce Billing, or Subscription Management is enabled.</p>

Field	Details
InstallDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Date when the asset was installed.</p>
IsCompetitorProduct	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether this Asset represents a product sold by a competitor (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>. Its UI label is Competitor Asset.</p>
IsInternal	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates that the asset is produced or used internally (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>. Its UI label is Internal Asset.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date and time that the asset was last modified. Its UI label is Last Modified Date.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date and time that the asset was last viewed.</p>
Latitude	<p>Type double</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description</p> <p>Used with Longitude to specify the precise geolocation of the address.</p>
LifecycleEndDate	<p>Type</p> <p>dateTime</p> <p>Properties</p> <p>Filter, Nillable, Sort</p> <p>Description</p> <p>Represents the end of the asset's lifecycle. System-populated field inherited from the end date of the final asset state period. If that field is empty, as with an evergreen subscription, the lifecycle has no end date. This field is available in API version 50.0 and later. This field is available when CPQ Plus, Salesforce Billing, or Subscription Management is enabled.</p>
LifecycleStartDate	<p>Type</p> <p>dateTime</p> <p>Properties</p> <p>Filter, Nillable, Sort</p> <p>Description</p> <p>Represents the beginning of the asset's lifecycle. System-populated field inherited from the start date of the earliest asset state period. This field can't be edited. When a new asset action affects the start date of an asset state period, the period is deleted and a new one is generated. This field is available in API version 50.0 and later. This field is available when CPQ Plus, Salesforce Billing, or Subscription Management is enabled.</p>
LocationId	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p>Description</p> <p>The asset's location. Typically, this location is the place where the asset is stored, such as a warehouse or van.</p> <p>If you have access to the location entity, it doesn't necessarily mean you can access the location id field. To access the location, you must have <code>userHasLocation</code> user access.</p>
Longitude	<p>Type</p> <p>double</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p>Description</p> <p>Used with Latitude to specify the precise geolocation of the address.</p>
ManufactureDate	<p>Type</p> <p>date</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date when the asset was manufactured. This field is available from API version 49.0 and later.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description (Required) Name of the asset. Label is Asset Name.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The asset's owner. By default, the asset owner is the user who created the asset record. Its UI label is Asset Owner. This field is a relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To User</p>
ParentId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The asset's parent asset. Its UI label is Parent Asset. This field is a relationship field.</p> <p>Relationship Name Parent</p> <p>Relationship Type Lookup</p> <p>Refers To Asset</p>

Field	Details
PostalCode	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The postal code for the address.</p>
Price	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Price paid for this asset.</p>
PricingSource	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Pricing source to use when amending or renewing an asset. Valid values are:</p> <ul style="list-style-type: none"> • LastTransaction—Last Transaction • PriceBookListPrice—Price Book or List Price <p>Available in API version 60.0 and later.</p>
Product2Id	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description (Optional) ID of the Product2 associated with this asset. Must be a valid Product2 ID. Its UI label is Product. This field is a relationship field.</p> <p>Relationship Name Product2</p> <p>Relationship Type Lookup</p> <p>Refers To Product2</p>

Field	Details
ProductCode	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The product code of the related product.</p>
ProductDescription	<p>Type string</p> <p>Properties Filter, Sort, Nillable</p> <p>Description The product description of the related product.</p>
ProductFamily	<p>Type picklist</p> <p>Properties Filter, Group, Sort, Nillable</p> <p>Description The product family of the related product.</p>
PurchaseDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Date on which this asset was purchased.</p>
Quantity	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Quantity purchased or installed. The Quantity field value isn't set by Customer Asset Lifecycle Management. Instead, you can populate the field as you need.</p>
QuantityIncreasePricingType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p>

Field	Details
	<p>Description</p> <p>Specify which pricing type to use when the quantity of this asset is increased. Its UI label is Pricing Type for Quantity Increase. This field is available in API version 56.0 and later. This field is available when Subscription Management is enabled.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • <code>LastNegotiatedPrice</code>—Available in API version 58.0 and later. • <code>ListPrice</code>
<code>RecordTypeId</code>	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Create, Filter, Group, Sort, Update</p> <p>Description</p> <p>The unique identifier for the asset.</p> <p>This field is a relationship field.</p> <p>Relationship Name</p> <p>RecordType</p> <p>Relationship Type</p> <p>Lookup</p> <p>Refers To</p> <p>RecordType</p>
<code>Reliability</code>	<p>Type</p> <p>percent</p> <p>Properties</p> <p>Filter, Nillable, Sort</p> <p>Description</p> <p>The percentage of expected uptime where the asset wasn't subject to unplanned downtime.</p>
<code>RenewalPricingType</code>	<p>Type</p> <p>picklist</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description</p> <p>The price used when renewing a subscription. Its UI label is Pricing Type for Renewal. This field is available in API version 55.0 and later. This field is available when Subscription Management is enabled.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • <code>LastNegotiatedPrice</code> • <code>ListPrice</code>

Field	Details
RenewalTerm	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description With Renewal Term Unit, defines the default subscription term for renewal quotes. This field is available in API version 55.0 and later. This field is available when Subscription Management is enabled.</p>
RenewalTermUnit	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The unit of time for a subscription term. This field is available in API version 55.0 and later. This field is available when Subscription Management is enabled. Possible values are:</p> <ul style="list-style-type: none"> • <code>Annual</code>—Available in API version 58.0 and later. —UI label is <code>Years</code>. • <code>Months</code>
RootAssetId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description (Read only) The top-level asset in an asset hierarchy. Depending on where an asset lies in the hierarchy, its root could be the same as its parent. Its UI label is Root Asset. This field is a relationship field.</p> <p>Relationship Name RootAsset</p> <p>Relationship Type Lookup</p> <p>Refers To Asset</p>
SalesStoreId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description ID of the RetailStore or WebStore associated with this Asset.</p>

Field	Details
	<p>This field is a polymorphic relationship field.</p> <p>To access this field, your org must have a Salesforce Order Management license or a B2B Commerce License.</p> <p>This field is available in API v60.0 and later.</p> <p>Relationship Name SalesStore</p> <p>Relationship Type Lookup</p> <p>Refers To RetailStore, WebStore</p>
SerialNumber	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Serial number for this asset.</p>
State	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The state detail for the address.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Customizable picklist of values. The default picklist includes the following values:</p> <ul style="list-style-type: none"> • Purchased • Shipped • Installed • Registered • Obsolete
StatusReason	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description</p> <p>The explanation of the device status. This field is available from API version 49.0 and later.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Not Ready • Off • Offline • Online • Paused • Standby
StockKeepingUnit	<p>Type</p> <p>string</p> <p>Properties</p> <p>Filter, Group, Nillable, Sort</p> <p>Description</p> <p>The SKU assigned to the related product.</p>
Street	<p>Type</p> <p>textarea</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p>Description</p> <p>The street detail for the address.</p>
SumDowntime	<p>Type</p> <p>double</p> <p>Properties</p> <p>Filter, Nillable, Sort</p> <p>Description</p> <p>Accumulated downtime (planned and unplanned), determined as follows:</p> <ul style="list-style-type: none"> • When only <code>UptimeRecordStart</code> is set, the sum of all downtime from <code>UptimeRecordStart</code> • When <code>UptimeRecordStart</code> and <code>UptimeRecordEnd</code> are set, the sum of all downtime from <code>UptimeRecordStart</code> to <code>UptimeRecordEnd</code> <p>Otherwise, downtime isn't accumulated.</p>
SumUnplannedDowntime	<p>Type</p> <p>double</p> <p>Properties</p> <p>Filter, Nillable, Sort</p>

Field	Details
	<p>Description Accumulated unplanned downtime, determined as follows:</p> <ul style="list-style-type: none"> • When only <code>UptimeRecordStart</code> is set, the sum of all unplanned downtime from <code>UptimeRecordStart</code> • When <code>UptimeRecordStart</code> and <code>UptimeRecordEnd</code> are set, the sum of all unplanned downtime from <code>UptimeRecordStart</code> to <code>UptimeRecordEnd</code> <p>Otherwise, unplanned downtime isn't accumulated.</p>
<code>TotalLifecycleAmount</code>	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The total amount of revenue for the asset, including revenue from each stage in the asset lifecycle. This field is available when CPQ Plus, Salesforce Billing, or Subscription Management is enabled.</p>
<code>UptimeRecordEnd</code>	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date until which <code>SumDowntime</code> and <code>SumUnplannedDowntime</code> are accumulated.</p>
<code>UptimeRecordStart</code>	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date from which <code>SumDowntime</code> and <code>SumUnplannedDowntime</code> are accumulated.</p>
<code>UsageEndDate</code>	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Date when usage for this asset ends or expires.</p>
<code>Uuid</code>	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description</p> <p>The unique ID for the asset. This field is available in API version 49.0 and later.</p>

Usage

Use this object to track products sold to customers. With asset tracking, a client application can quickly determine which products were previously sold or are currently installed at a specific account. You can also create hierarchies of up to 10,000 assets.

For example, suppose that your company wants to renew and upsell opportunities on products sold in the past. Similarly, your company can track competitive products in a customer environment where products can be replaced or swapped out.

Asset tracking is also useful for product support, providing detailed information to assist with product-specific support issues. For example, the `PurchaseDate` or `SerialNumber` can indicate whether a given product has certain maintenance requirements, including product recalls. Similarly, the `UsageEndDate` can indicate when the asset was removed from service or when a license or warranty expires.

If an application creates an `Asset` record, it must specify a `Name` and either an `AccountId`, `ContactId`, or both.

With REST API, use the `getRelatedListInfo` function to get information about related lists on the asset. Note that when requesting information about `PrimaryAssets`, the response is labeled `Related Assets`, and the response for `RelatedAssets` is labeled `Primary Assets`.

Associated Objects

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

AssetChangeEvent (API version 44.0)

Change events are available for the object.

AssetFeed

Feed tracking is available for the object.

AssetHistory

History is available for tracked fields of the object.

AssetOwnerSharingRule

Sharing rules are available for the object.

AssetShare

Sharing is available for the object.

AssetAction

Represents a change made to a lifecycle-managed asset. The fields can't be edited. This object is available in API version 50.0 and later.

Supported Calls

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

Special Access Rules

To use Customer Asset Lifecycle Management APIs, you must have the Access Customer Asset Lifecycle Management APIs permission and Read access to the Asset, Asset Action, Asset Action Source, and Asset State Period objects.

Fields

Field	Details
ActionDate	<p>Type dateTime</p> <p>Properties Filter, Sort</p> <p>Description The date when an asset action change is recorded. This date can differ from the start date of the related asset state period. For example, suppose that a customer cancels a subscription in June, and the subscription expires in October. The date the customer cancels the subscription (June) is the action date of the asset action. The cancellation's effective date (October) is the start date of the asset state period.</p>
ActualTaxChange	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The rollup of actual tax from all asset action sources. This field is populated by the system. Label is Change in Actual Tax. This field is a calculated field.</p>
AdjustmentAmountChange	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The rollup of adjustment amount from all asset action sources. This field is populated by the system. Label is Change in Adjustment Amount. This field is a calculated field.</p>
Amount	<p>Type currency</p> <p>Properties Filter, Sort</p> <p>Description The delta in the total asset amount resulting from an asset action.</p>

Field	Details
AssetActionNumber	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The ID of the asset action. Label is Name.</p>
AssetId	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description The ID of the related lifecycle-managed asset. Label is Asset. This field is a relationship field.</p> <p>Relationship Name Asset</p> <p>Relationship Type Lookup</p> <p>Refers To Asset</p>
CanRollBack	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates whether the last asset action can be rolled back (<code>true</code>). If this property is set to <code>false</code>, the asset and the last asset action can't be rolled back. The default value is <code>false</code>. This field is available in API version 65.0 and later.</p>
CategoryEnum	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description The business category of the asset action, for use in reporting. Asset action totals are broken out by the picklist values on this required field, and those totals are in turn reflected on assets. The following categories are available. They aren't customizable. Label is Business Category. Possible values are:</p> <ul style="list-style-type: none"> • Cancellations • Cross-Sells

Field	Details
	<ul style="list-style-type: none"> • Downsell • Initial Sale • Other • Renewals • Terms And Conditions Changes • Transfers • Upsells
EstimatedTaxChange	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The rollup of estimated tax from all asset action sources. This field is populated by the system. Label is Change in Estimated Tax. This field is a calculated field.</p>
MrrChange	<p>Type currency</p> <p>Properties Filter, Sort</p> <p>Description The delta in the asset's monthly recurring revenue resulting from an asset action. For example, suppose that the MRR during an asset state period is \$200 and the next asset action adds \$100. Then this field's value is \$100. Label is Change in Monthly Recurring Revenue.</p>
ProductAmountChange	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The rollup of product amount from all asset action sources. This field is populated by the system. Label is Change in Product Amount. This field is a calculated field.</p>
QuantityChange	<p>Type double</p> <p>Properties Filter, Sort</p>

Field	Details
	<p>Description</p> <p>The delta in the asset quantity resulting from an asset action. For example, suppose that the asset quantity during an asset state period is 20 and the next asset action adds 10. Then this field's value is 10. Label is Change in Quantity.</p>
RolledbackAssetAction	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p>Description</p> <p>The last asset action that was rolled back in the current rollback transaction. This field is available in API version 65.0 and later.</p>
SubtotalChange	<p>Type</p> <p>currency</p> <p>Properties</p> <p>Filter, Nillable, Sort</p> <p>Description</p> <p>The rollup of subtotal from all asset action sources. This field is populated by the system. Label is Change in Subtotal.</p> <p>This field is a calculated field.</p>
Subtype	<p>Type</p> <p>picklist</p> <p>Properties</p> <p>Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description</p> <p>The subtype of the action on the asset.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • FieldAmendment • Rollback • StartDateAdjustment • TransferFrom • TransferTo <p>This field is available in API version 65.0 and later.</p>
TotalAmount	<p>Type</p> <p>currency</p> <p>Properties</p> <p>Filter, Nillable, Sort</p>

Field	Details
	<p>Description</p> <p>The sum of the current and previous asset action amount. This field is populated by the system.</p> <p>This field is a calculated field.</p>
TotalCancellationsAmount	<p>Type</p> <p>currency</p> <p>Properties</p> <p>Filter, Nillable, Sort</p> <p>Description</p> <p>The sum of current and previous asset action amounts categorized as Cancellations. This field is populated by the system.</p>
TotalCrossSellsAmount	<p>Type</p> <p>currency</p> <p>Properties</p> <p>Filter, Nillable, Sort</p> <p>Description</p> <p>The sum of current and previous asset action amounts categorized as Cross-Sells. This field is populated by the system.</p>
TotalDownsellsAmount	<p>Type</p> <p>currency</p> <p>Properties</p> <p>Filter, Nillable, Sort</p> <p>Description</p> <p>The sum of current and previous asset action amounts categorized as Downsells. This field is populated by the system.</p>
TotalInitialSaleAmount	<p>Type</p> <p>currency</p> <p>Properties</p> <p>Filter, Nillable, Sort</p> <p>Description</p> <p>The sum of current and previous asset action amounts categorized as Initial Sale. This field is populated by the system.</p>
TotalMrr	<p>Type</p> <p>currency</p> <p>Properties</p> <p>Filter, Nillable, Sort</p>

Field	Details
	<p>Description The sum of the monthly recurring revenue for the current and previous asset action. This field is populated by the system. Label is Total Monthly Recurring Revenue.</p>
TotalOtherAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The sum of current and previous asset action amounts categorized as <code>Other</code>. This field is populated by the system.</p>
TotalQuantity	<p>Type double</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The sum of the changes in quantity for the current and previous asset action. This field is populated by the system.</p>
TotalRenewalsAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The sum of current and previous asset action amounts categorized as <code>Renewals</code>. This field is populated by the system.</p>
TotalTermsAndConditionsAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The sum of current and previous asset action amounts categorized as <code>Terms and Conditions Changes</code>. This field is populated by the system. Label is Total Terms and Conditions Changes Amount.</p>
TotalTransfersAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	<p>Description</p> <p>The sum of current and previous asset action amounts categorized as <code>Transfers</code>. This field is populated by the system.</p>
<code>TotalUpsellsAmount</code>	<p>Type</p> <p>currency</p> <p>Properties</p> <p>Filter, Nillable, Sort</p> <p>Description</p> <p>The sum of current and previous asset action amounts categorized as <code>Upsells</code>. This field is populated by the system.</p>
<code>Type</code>	<p>Type</p> <p>picklist</p> <p>Properties</p> <p>Filter, Group, Restricted picklist, Sort</p> <p>Description</p> <p>The REST API used to generate the asset action. This field is populated by the system.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • <code>Cancel</code> • <code>Change</code> • <code>Convert</code> • <code>Generate</code>

AssetActionSource

Represents an optional way to record what transactions caused changes to lifecycle-managed assets. Use it to trace financial and other information about asset actions. This object supports Salesforce order products and work order line items, and transaction IDs from other systems. The fields can't be edited. This object is available in API version 50.0 and later.

Supported Calls

`createable()`, `deletable()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `search()`, `undeletable()`, `updateable()`.

Special Access Rules

To use Customer Asset Lifecycle Management APIs, you must have the `Access Customer Asset Lifecycle Management APIs` permission and `Read` access to the `Asset`, `Asset Action`, `Asset Action Source`, and `Asset State Period` objects.

Fields

Field	Details
ActualTax	<p>Type currency</p> <p>Properties Createable, Filter, Nillable, Sort, Updateable</p> <p>Description The region-specific tax amount determined at time of the order. This field is not used for price and tax calculations.</p>
AdjustmentAmount	<p>Type currency</p> <p>Properties Createable, Filter, Nillable, Sort, Updateable</p> <p>Description An adjustment to the product amount, such as a discount.</p>
AssetActionId	<p>Type reference</p> <p>Properties Createable, Filter, Group, Sort</p> <p>Description The related asset action, that is, the change caused by an asset action source transaction. This field is a relationship field.</p> <p>Relationship Name AssetAction</p> <p>Relationship Type Lookup</p> <p>Refers To AssetAction</p>
AssetActionSourceNumber	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The ID of the asset action source. Label is Name.</p>
BillingReference	<p>Type string</p>

Field	Details
	<p>Properties Filter, Group, Nillable, Sort</p> <p>Description The ID of the OrderItem or OrderItemDetail record that this AssetActionSource record is created for.</p>
Discount	<p>Type percent</p> <p>Properties Createable, Filter, Group, Nillable, Sort, Updateable</p> <p>Description The discount, expressed as a percentage, that's applied to the asset. This field is available in API version 62.0 and later.</p>
DiscountAmount	<p>Type currency</p> <p>Properties Createable, Filter, Nillable, Sort, Updateable</p> <p>Description The discount, expressed as currency, that's applied to the asset. This field is available in API version 62.0 and later.</p>
EffectiveGrantDate	<p>Type dateTime</p> <p>Properties Createable, Filter, Nillable, Sort, Updateable</p> <p>Description The date when the resources associated with the asset were granted. This field is available in orgs that have Revenue Cloud when Rate Management is enabled. This field is available in API version 62.0 and later.</p>
EndDate	<p>Type dateTime</p> <p>Properties Createable, Filter, Nillable, Sort, Updateable</p> <p>Description The end date of the service or change.</p>
EstimatedTax	<p>Type currency</p>

Field	Details
	<p>Properties Createable, Filter, Nillable, Sort, Updateable</p> <p>Description The estimate of the region-specific tax amount made at time of the transaction.</p>
ExternalReference	<p>Type string</p> <p>Properties Createable, Filter, Group, Nillable, Sort, Updateable</p> <p>Description The ID of an asset action source transaction originating in a system outside of Salesforce.</p>
ExternalReferenceDataSource	<p>Type string</p> <p>Properties Createable, Filter, Group, Nillable, Sort, Updateable</p> <p>Description A system outside of Salesforce that contains asset action source transactions.</p>
LegalEntityId	<p>Type reference</p> <p>Properties Createable, Filter, Group, Nillable, Sort, Updateable</p> <p>Description The ID of the legal entity record associated with the asset action source transaction. This field is a relationship field. This field is available in API version 62.0 and later.</p> <p>Relationship Name LegalEntity</p> <p>Relationship Type Lookup</p> <p>Refers To LegalEntity</p>
ListPrice	<p>Type currency</p> <p>Properties Creatable, Filter, Nillable, Sort, Updateable</p> <p>Description List price for the order product. Value is inherited from the associated PriceBookEntry upon order product creation.</p>

Field	Details
NetUnitPrice	<p>Type currency</p> <p>Properties Createable, Filter, Nillable, Sort, Updateable</p> <p>Description The final adjusted unit price, inclusive of all adjustments, but exclusive of tax. The unit price after all price adjustments are applied.</p>
ObligatedAmount	<p>Type currency</p> <p>Properties Createable, Filter, Nillable, Sort, Updateable</p> <p>Description When a line amount is prorated, this amount shows the service amount that's been consumed.</p>
OriginalLineNumber	<p>Type int</p> <p>Properties Createable, Filter, Group, Nillable, Sort, Updateable</p> <p>Description The number of the original order item detail line. Salesforce uses this information to create a record to amend, renew, or cancel an order. This field is available in API version 64.0 and later.</p> <p>Relationship Name OrderItemDetail</p> <p>Relationship Type Lookup</p> <p>Refers To LineNumber</p>
PeriodBoundary	<p>Type picklist</p> <p>Properties Createable, Filter, Nillable, Sort, Updateable</p> <p>Description Boundary delimiters for periods. It determines when a period starts and/or ends. Valid values are:</p> <ul style="list-style-type: none"> • AlignToCalendar • Anniversary • DayOfPeriod • LastDayOfPeriod

Field	Details
PeriodBoundaryDay	<p>Type int</p> <p>Properties Createable, Filter, Nillable, Sort, Updateable</p> <p>Description The number specifying the day number when Period Boundary is a specific day in a week/month/year. It only applies when PeriodBoundary is set to "day of period."</p>
PeriodBoundaryStartMonth	<p>Type picklist</p> <p>Properties Createable, Filter, Nillable, Sort, Updateable</p> <p>Description Field is populated based on input in the StartDate, PeriodBoundary, and PeriodBoundaryDay when BillingFrequency2 is Annual or by manual user entry. Possible values are: 1-January 2-February 3-March 4-April 5-May 6-June 7-July 8-August 9-September 10-October 11-November 12-December</p>
PricebookEntryId	<p>Type reference</p> <p>Properties Createable, Filter, Group, Nillable, Sort, Updateable</p> <p>Description PricebookEntry is used as a lookup for price information in order to pre-populate OrderItem's ListPrice and UnitPrice.</p>
PricingTermCount	<p>Type double</p> <p>Properties Createable, Filter, Nillable, Sort, Updateable</p>

Field	Details
	<p>Description Number of pricing terms is this subscription product.</p>
ProductAmount	<p>Type currency</p> <p>Properties Createable, Filter, Nillable, Sort, Updateable</p> <p>Description The product amount after the asset action source transaction.</p>
ProductSellingModelId	<p>Type reference</p> <p>Properties Createable, Filter, Group, Nillable, Sort, Updateable</p> <p>Description Specifies the product selling model type. Foreignkey to ProductSellingModel entity.</p>
ProrationPolicyId	<p>Type reference</p> <p>Properties Createable, Filter, Group, Nillable, Sort, Updateable</p> <p>Description The ID of the ProrationPolicy used for pricing.</p>
Quantity	<p>Type double</p> <p>Properties Createable, Filter, Nillable, Sort, Updateable</p> <p>Description The product quantity or the change in product quantity after the asset action source transaction.</p>
ReferenceEntityItemId	<p>Type reference</p> <p>Properties Createable, Filter, Group, Nillable, Sort, Updateable</p> <p>Description The ID of an asset action source transaction originating in Salesforce. The transaction can be an order product or a work order line item. This field is a polymorphic relationship field.</p>

Field	Details
	<p>Relationship Name ReferenceEntityItem</p> <p>Relationship Type Lookup</p> <p>Refers To OrderItem, WorkOrderLineItem</p>
SegmentIdentifier	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The ID of the ramp segment associated with the asset action source transaction. This field is available in API version 62.0 and later.</p>
StartDate	<p>Type dateTime</p> <p>Properties Createable, Filter, Nillable, Sort, Updateable</p> <p>Description The start date of the service or change.</p>
Subtotal	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The sum of the product amount and the adjustment amount. This field is a calculated field.</p>
TaxTreatmentId	<p>Type reference</p> <p>Properties Createable, Filter, Group, Nillable, Sort, Updateable</p> <p>Description Lookup to Tax Treatment entity. It's used to calculate tax.</p>
TotalLineAmount	<p>Type currency</p> <p>Properties Createable, Filter, Nillable, Sort, Updateable</p>

Field	Details
	<p>Description</p> <p>The price of the line before any price adjustments were applied. SalesTransactionItem: ProratedStartingTotal / StartingPriceTotal. Note: TotalPrice is computed using the UnitPrice, which includes discounts (price adjustments), while TotalLineAmount doesn't include price adjustments.</p>
TotalPrice	<p>Type</p> <p>currency</p> <p>Properties</p> <p>Createable, Filter, Nillable, Sort, Updateable</p> <p>Description</p> <p>Calculated by the pricing engine for ARC. Summation of TotalAdjustmentAmount plus TotalLineAmount for this item.</p>
TransactionDate	<p>Type</p> <p>dateTime</p> <p>Properties</p> <p>Createable, Filter, Nillable, Sort, Updateable</p> <p>Description</p> <p>The date of a source transaction, such as an order date.</p>
UnitPrice	<p>Type</p> <p>currency</p> <p>Properties</p> <p>Createable, Filter, Nillable, Sort, Updateable</p> <p>Description</p> <p>The unit price of the item before any discounts or tax calculation.</p>

AssetContractRelationship

Represents a relationship between an asset and a contract. This object is available in API version 60.0 and later.

Supported Calls

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

Special Access Rules

This object is available in Enterprise, Unlimited, and Developer Editions of Revenue Cloud.

Fields

Field	Details
AssetId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The ID of the asset related to the contract. This field is a relationship field.</p> <p>Relationship Name Asset</p> <p>Relationship Type Lookup</p> <p>Refers To Asset</p>
ContractId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The ID of the contract related to the asset. This field is a relationship field.</p> <p>Relationship Name Contract</p> <p>Relationship Type Lookup</p> <p>Refers To Contract</p>
EndDate	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The end date and time of the relationship between contract and asset.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nullable, Sort</p>

Field	Details
	<p>Description</p> <p>The timestamp when the current user last accessed this record, a record related to this record, or a list view. The associated UI label is Last Modified Date.</p>
LastViewedDate	<p>Type</p> <p>dateTime</p> <p>Properties</p> <p>Filter, Nillable, Sort</p> <p>Description</p> <p>The timestamp when the current user last viewed this record or list view. If this value is null, the user accessed this record or list view (<code>LastReferencedDate</code>) but didn't view it.</p>
Name	<p>Type</p> <p>string</p> <p>Properties</p> <p>Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description</p> <p>The auto-generated number assigned to AssetContractRelationship. (Read Only)</p>
StartDate	<p>Type</p> <p>dateTime</p> <p>Properties</p> <p>Create, Filter, Sort, Update</p> <p>Description</p> <p>The start date and time of the relationship between contract and asset.</p>

Associated Objects

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

[AssetContractRelationshipFeed](#)

Feed tracking is available for the object.

[AssetContractRelationshipHistory](#)

History is available for tracked fields of the object.

AssetDowntimePeriod

Represents a period during which an asset is not able to perform as expected. Downtime periods include planned activities, such as maintenance, and unplanned events, such as mechanical breakdown. This object is available in API version 49.0 and later.

Supported Calls

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


Fields

Field	Details
AssetDowntimePeriodNumber	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The unique number of this asset downtime period record.</p>
AssetId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The ID of the asset this asset downtime period record is for.</p>
Description	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description The description of this asset downtime period.</p>
DowntimeType	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The type of this asset downtime period. Possible values are:</p> <ul style="list-style-type: none"> Planned Unplanned
EndTime	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p>

Field	Details
	<p>Description The time this asset downtime period ended.</p>
IsExcluded	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Whether this asset downtime period is excluded from the calculation of accumulated downtime and accumulated unplanned downtime, and therefore not included in availability and reliability calculations.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, this record might only have been referenced (<code>LastReferencedDate</code>) and not viewed.</p>
StartTime	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The time this asset downtime period started.</p>

AssetOwnerSharingRule

Represents the rules for sharing an Asset with users other than the owner. This object is available in API version 33.0 and later.

 **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

Customer Portal users can't access this object.

Fields

Field	Details
<code>AssetAccessLevel</code>	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description A value that represents the type of sharing being allowed. The possible values are:</p> <ul style="list-style-type: none"> • Read • Edit
<code>Description</code>	<p>Type textarea</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description A description of the sharing rule. Maximum size is 1000 characters.</p>
<code>DeveloperName</code>	<p>Type string</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The unique name of the object in the API. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization. Corresponds to Rule Name in the user interface.</p> <p> Note: When creating large sets of data, always specify a unique <code>DeveloperName</code> for each record. If no <code>DeveloperName</code> is specified, performance may slow while Salesforce generates one for each record.</p>

Field	Details
GroupId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The ID representing the source group. Cases owned by users in the source group trigger the rule to give access.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Label of the sharing rule as it appears in the user interface. Limited to 80 characters. Corresponds to Label on the user interface.</p>
UserOrGroupId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The ID representing the target user or group. Target users or groups are given access.</p>

Usage

Use this object to manage the sharing rules for assets. General sharing uses this object.

AssetRateCardEntry

Stores the negotiated rate card entries that are associated with an asset in Revenue Cloud. This object is available in API version 62.0 and later.



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

Supported Calls

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

Special Access Rules

This object is available in orgs where Revenue Cloud is enabled.

Fields

Field	Details
AssetId	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description The ID of the asset rate card entry record. This field is a relationship field.</p> <p>Relationship Name Asset</p> <p>Relationship Type Master-detail</p> <p>Refers To Asset (the master object)</p>
BindingObjectFormula	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The formula that returns the ID of the associated binding object, if specified. If binding object isn't added, the formula returns the asset ID of the asset related to this asset rate card entry. This field is read-only. Available in API version 65.0 and later.</p>
BindingObjectId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The ID of the binding object associated with the asset rate card entry. Available in API version 65.0 and later. This field is a relationship field.</p> <p>Relationship Name BindingObject</p> <p>Refers To Asset</p>
BindingObjectRateOrder	<p>Type double</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The order that determines the applicable binding object rate when multiple rates are defined for an Anchor binding object within a effective period. Available in API version 65.0 and later.</p>
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Defaulted on create, Filter, Group, Restricted picklist, Sort</p> <p>Description The ID of the binding object associated with the asset rate card entry. Possible values are:</p> <ul style="list-style-type: none"> • AED - UAE Dirham • AUD - Australian Dollar • BRL - Brazilian Real • CAD - Canadian Dollar • EUR - Euro • GBP - British Pound • INR - Indian Rupee • JPY - Japanese Yen • SEK - Swedish Krona • USD - U.S. Dollar <p>The default value is USD. Available in API version 65.0 and later.</p>
EndDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date when the rate card's time period becomes inactive. The rate card becomes inactive at 11:59:00 PM on the end date.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description An auto-generated number assigned to the asset rate card entry. Read-only.</p>

Field	Details
NegotiatedRate	<p>Type double</p> <p>Properties Filter, Sort</p> <p>Description The base negotiated rate used to charge overage consumption.</p>
RateCardEntryId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The ID of the rate card entry record containing the catalog rates that's associated with the asset rate card entry. This field is a relationship field.</p> <p>Relationship Name RateCardEntry</p> <p>Refers To RateCardEntry</p>
RateCardId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The ID of the rate card record that's associated with the asset rate card entry. This field is a relationship field.</p> <p>Relationship Name RateCard</p> <p>Refers To RateCard</p>
RateUnitOfMeasureId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The ID of the unit of measure record that's associated with the asset rate card entry. This field is a relationship field.</p> <p>Relationship Name RateUnitOfMeasure</p>

Field	Details
	Refers To UnitOfMeasure
StartDate	Type dateTime Properties Filter, Sort Description The date when the rate card's time period becomes active. The rate card becomes active at 12:00:00 AM on the start date.
UsageResourceId	Type reference Properties Filter, Group, Nillable, Sort Description The ID of the usage resource record that's associated with the asset rate card entry. This field is a relationship field. Relationship Name UsageResource Refers To UsageResource

AssetRelationship

Represents a non-hierarchical relationship between assets due to an asset modification; for example, a replacement, upgrade, or other circumstance. In Subscription Management and Revenue Lifecycle Management, this object represents an asset or assets grouped in a bundle or set. This object is available in API version 41.0 and later.

Asset relationships appear in the Primary Assets and Related Assets related lists on asset records in the UI.

Supported Calls

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

Special Access Rules

Some fields are available only in Subscription Management and Revenue Cloud. Field availability is noted in the field detail column.

Fields

Field Name	Details
AssetId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The unique identifier of the new asset, which is the asset that is taking the place of the existing asset. This field is a relationship field.</p> <p>Relationship Name Asset</p> <p>Relationship Type Lookup</p> <p>Refers To Asset</p>
AssetRelationshipNumber	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description An auto-generated number identifying the asset relationship.</p>
AssetRole	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Describes the position of the main asset relative to the other assets in the relationship. This field is available in API version 58.0 and later. This field is available in orgs with Subscription Management or Revenue Cloud. Possible values are:</p> <ul style="list-style-type: none"> • <code>Add-on</code>—The main asset is an add-on. • <code>Bundle</code>—The main asset is the bundle parent. • <code>Set</code>—The asset is the main asset in the set.
CurrencyIsoCode	<p>Type picklist</p>

Field Name	Details
	<p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Three-letter ISO 4217 currency code associated with the asset. The default value is USD.</p>
FromDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date when the new asset was installed.</p>
GroupingKey	<p>Type string</p> <p>Properties Filter, Group, idLookup, Nillable, Sort</p> <p>Description Read-only field used to indicate the bundle that an asset belongs to. For example, if two assets have the same GroupingKey value, then it means that the assets are bundled together. This field is available in API v.60.0 and later. This field is available in orgs with Subscription Management or Revenue Cloud.</p>
ProductRelationshipTypeId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The unique identifier of the record that describes the relationship between the main and associated assets. This field is available in API version 58.0 and later. This field is available in orgs with Subscription Management. This field is a relationship field.</p> <p>Relationship Name ProductRelationshipType</p> <p>Relationship Type Lookup</p> <p>Refers To ProductRelationshipType</p>

Field Name	Details
ProductRelatedComponent	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The product related component that's associated with the asset relationship. This field is a relationship field. This field is available in API 60.0 and later in Revenue Cloud.</p> <p>Relationship Name ProductRelatedComponent</p> <p>Relationship Type Lookup</p> <p>Refers To ProductRelatedComponent</p>
RelatedAssetId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The existing asset that is being modified. This field is a relationship field.</p> <p>Relationship Name RelatedAsset</p> <p>Relationship Type Lookup</p> <p>Refers To Asset</p>
RelatedAssetPricing	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Specifies whether the price of the related asset is included in the bundle price. Valid values are:</p> <ul style="list-style-type: none"> • IncludedInBundlePrice • NotIncludedInBundlePrice <p>This field is available in API version 59.0 and later in Revenue Cloud.</p>

Field Name	Details
RelatedAssetQtyScaleMethod	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Specifies how the quantity of the related asset changes relative to the quantity of the parent asset. Valid values are:</p> <ul style="list-style-type: none"> • <code>Constant</code> • <code>Proportional</code> <p>This field is available in API version 59.0 and later in Revenue Cloud.</p>
RelatedAssetRole	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Describes the position of the associated asset relative to other assets in the relationship.</p> <p>This field is available in API version 58.0 and later. This field is available in orgs with Subscription Management or Revenue Cloud.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • <code>Add-on</code>—The main asset is an add-on. • <code>Bundle</code>—The main asset is the bundle parent. • <code>Set</code>—The asset is the main asset in the set. • <code>Simple</code>—The asset is purchased individually and isn't associated with variations. • <code>Variation Parent</code>—The main asset is the variation parent.
RelationshipType	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update</p> <p>Description The type of relationship between the existing asset and the new asset. This field comes with three values—<code>Replacement</code>, <code>Upgrade</code>, and <code>Crossgrade</code>—, but you can create more values in Setup.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • <code>Crossgrade</code>—The new asset is a crossgrade of an existing asset. For example, changing a subscription to a plan with the same service, but that runs for a longer amount of time.

Field Name	Details
	<ul style="list-style-type: none"> Replacement—The new asset is replacing an existing asset. For example, a customer’s faulty widget that was under warranty is being replaced with a new one. Upgrade—The new asset is an upgrade of an existing asset. For example, upgrading a customer’s existing subscription plan to a new plan with more services. <p>The default value is <code>Replacement</code>.</p>
<code>ToDate</code>	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date when the modified asset is uninstalled.</p>

Associated Objects

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

AssetRelationshipChangeEvent (API version 62.0)

Change events are available for the object.

AssetRelationshipFeed

Feed tracking is available for the object.

AssetRelationshipHistory

History is available for tracked fields of the object.

AssetRelationshipOwnerSharingRule (API version 58.0)

Sharing rules are available for the object.


AssetRelationshipShare (API version 58.0)

Sharing is available for the object.

AssetShare

Represents a sharing entry on an Asset. This object is available in API version 33.0 and later.

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

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

Supported Calls

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

Special Access Rules

Customer Portal users can't access this object.

Fields

The properties available for some fields depend on the default organization-wide sharing settings. The properties listed are true for the default settings of such fields.

Field	Details
<code>AssetAccessLevel</code>	<p>Type picklist</p> <p>Properties Filter, Group, Restricted picklist, Sort</p> <p>Description Level of access that the User or Group has to the Asset. The possible values are:</p> <ul style="list-style-type: none"> • Read • Edit • All This value is not valid for creating or deleting records. <p>This field must be set to an access level that is higher than the organization's default access level for cases.</p>
<code>AssetId</code>	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description ID of the Asset associated with this sharing entry. This field can't be updated. This is a relationship field.</p> <p>Relationship Name Asset</p> <p>Relationship Type Lookup</p> <p>Refers To Asset</p>
<code>IsDeleted</code>	<p>Type boolean</p>

Field	Details
	<p>Properties Defaulted on create, Filter</p> <p>Description Indicates whether the object has been moved to the Recycle Bin (<code>true</code>) or not (<code>false</code>). Label is Deleted.</p>
RowCause	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Reason that this sharing entry exists. If you're creating a sharing entry, the only permitted value is <code>Manual</code>. If no value is specified, the field defaults to <code>Manual</code>. All other <code>RowCause</code> values are read-only. After the sharing entry is created, this field can't be edited.</p> <p>Valid values include:</p> <ul style="list-style-type: none"> • <code>Manual</code>—The User or Group has access because a user with "All" access manually shared the Asset with them. • <code>Owner</code>—The User is the owner of the Asset. • <code>Rule</code>—The User or Group has access via an Asset sharing rule. • <code>GuestRule</code>—The User or Group has access via an Asset guest user sharing rule. • <code>LpuImplicit</code>—The User has access to records owned by high-volume Experience Cloud site users via a share group.
UserOrGroupId	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description ID of the User or Group that has been given access to the Asset. This field can't be updated. This is a polymorphic relationship field.</p> <p>Relationship Name UserOrGroup</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>

Usage

This object allows you to determine which users and groups can view and edit Asset records owned by other users.

If you attempt to create a new record that matches an existing record, request updates any modified fields and returns the existing record.

AssetStatePeriod

Represents a time span when an asset has the same quantity, amount, and monthly recurring revenue (MRR). An asset has as many asset state periods as there are changes to it (asset actions) during its lifecycle. The dashboard and related pages show the current asset state period. The fields can't be edited. This object is available in API version 50.0 and later.

Supported Calls

`createable()`, `deletable()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `search()`, `updateable()`.

Special Access Rules

To use Customer Asset Lifecycle Management APIs, you must have the Access Customer Asset Lifecycle Management APIs permission and Read access to the Asset, Asset Action, Asset Action Source, and Asset State Period objects.

Fields

Field	Details
Amount	<p>Type currency</p> <p>Properties Createable, Filter, Sort, Updateable</p> <p>Description An asset's total amount during an asset state period. Revenue Cloud doesn't set or use this field's value currently.</p>
AssetId	<p>Type reference</p> <p>Properties Createable, Filter, Group, Sort</p> <p>Description The asset related to an asset state period. Label is Asset. This field is a relationship field.</p> <p>Relationship Name Asset</p> <p>Relationship Type Lookup</p> <p>Refers To Asset</p>

Field	Details
AssetStatePeriodNumber	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The ID of the asset state period. Label is Name.</p>
BillingFrequency	<p>Type picklist</p> <p>Properties Createable, Filter, Group, Nillable, Restricted picklist, Sort, Updateable</p> <p>Description The time period that indicates how often the line item is billed. Possible values are:</p> <ul style="list-style-type: none"> • Annual • Monthly • Quarterly • Semi-Annual <p>Available in API version 65.0 and later.</p>
BindingInstanceTargetId	<p>Type reference</p> <p>Properties Createable, Filter, Group, Nillable, Sort, Updateable</p> <p>Description The ID of a custom product target for a usage-based quote line item, order item, or asset allocation. This field is a polymorphic relationship field.</p> <p>Relationship Name BindingInstanceTarget</p> <p>Refers To Account, Asset, BindingObjectCustomExt, Contract</p>
Discount	<p>Type percent</p> <p>Properties Createable, Filter, Nillable, Sort, Updateable</p> <p>Description Editable number from 0 to 100. Available in API version 65.0 and later.</p>


Field	Details
DiscountAmount	<p>Type currency</p> <p>Properties Createable, Filter, Nillable, Sort, Updateable</p> <p>Description The fixed amount discount to apply to the line item. Available in API version 65.0 and later.</p>
EndDate	<p>Type dateTime</p> <p>Properties Createable, Filter, Nillable, Sort, Updateable</p> <p>Description The end date and time of an asset state period. On an asset that is an evergreen subscription, the last asset state period has no end date.</p>
LegalEntityId	<p>Type reference</p> <p>Properties Createable, Filter, Group, Nillable, Sort, Updateable</p> <p>Description The ID of the related legal entity. This field is a relationship field.</p> <p>Relationship Name LegalEntity</p> <p>Refers To LegalEntity</p>
Mrr	<p>Type currency</p> <p>Properties Createable, Filter, Sort, Updateable</p> <p>Description An asset's monthly recurring revenue during an asset state period.</p>
PriceRevisionPolicy	<p>Type reference</p> <p>Properties Createable, Filter, Group, Sort, Updateable</p> <p>Description Specifies the price uplift policy associated with this asset state period. This field is a relationship field.</p>

Field	Details
	<p>This field is available in API version 65.0 and later.</p> <p>Relationship Name Price Revision Policy</p> <p>Relationship Type Lookup</p> <p>Refers To PriceRevisionPolicy</p>
Quantity	<p>Type double</p> <p>Properties Createable, Filter, Sort, Updateable</p> <p>Description The total quantity of an asset during an asset state period.</p>
RampIdentifier	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The ramp record used to group order item segments for this asset state period. This field is available in orgs that have Revenue Cloud when the Ramp Deals setting is enabled. This field is available in API version 62.0 and later.</p>
SegmentIdentifier	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The order item segment for this asset state period. This field is available in orgs that have Revenue Cloud when the Ramp Deals setting is enabled. This field is available in API version 62.0 and later.</p>
SegmentName	<p>Type string</p> <p>Properties Createable, Filter, Group, Nillable, Sort, Updateable</p> <p>Description The name of the order item segment for this asset state period. This field is available in orgs that have Revenue Cloud when the Ramp Deals setting is enabled.</p>

Field	Details
	This field is available in API version 62.0 and later.
SegmentType	<p>Type picklist</p> <p>Properties Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Updateable</p> <p>Description The period for the order item segment for this asset state period. Valid values are:</p> <ul style="list-style-type: none"> • Custom • Free Trial • Yearly <p>The default value is Yearly.</p> <p>This field is available in orgs that have Revenue Cloud when the Ramp Deals setting is enabled.</p> <p>This field is available in API version 62.0 and later.</p>
StartDate	<p>Type dateTime</p> <p>Properties Createable, Filter, Sort, Updateable</p> <p>Description The start date and time of an asset state period.</p>
UnitPrice	<p>Type currency</p> <p>Properties Createable, Filter, Nillable, Sort, Updateable</p> <p>Description The price per unit for the line item. Available in API version 65.0 and later.</p>
UnitPriceUplift	<p>Type percent</p> <p>Properties Createable, Filter, Nillable, Sort, Updateable</p> <p>Description Indicates the percentage increase of a line item's unit price. Available in API version 65.0 and later.</p>

AssetStatePeriodAttribute

Represents a virtual object that holds the key-value pair of the asset attribute in a specified asset state period. This object is a child object of AssetStatePeriod. This object is available in API version 60.0 and later.

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

Supported Calls

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

Special Access Rules

This object is available in Enterprise, Unlimited, and Developer Editions of Revenue Cloud.

Fields

Field	Details
<code>AssetStatePeriodId</code>	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description The asset state period that's associated with the asset attribute. This field is a relationship field.</p> <p>Relationship Name AssetStatePeriod</p> <p>Relationship Type Master-detail</p> <p>Refers To AssetStatePeriod (the master object)</p>
<code>AttributeDefinitionId</code>	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description The attribute definition that's associated with the asset state period attribute. This field is a relationship field.</p> <p>Relationship Name AttributeDefinition</p> <p>Relationship Type Lookup</p>

Field	Details
	<p>Refers To AttributeDefinition</p>
AttributeName	<p>Type string</p> <p>Properties Filter, Group, idLookup, Nillable, Sort</p> <p>Description The name of the asset attribute.</p>
AttributePicklistValueId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The value specified in the picklist type field that corresponds to the attribute in the AttributePicklistValue object. This field is a relationship field.</p> <p>Relationship Name AttributePicklistValue</p> <p>Relationship Type Lookup</p> <p>Refers To AttributePicklistValue</p>
AttributeValue	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The value of the asset state period attribute. For example, a shirt can have the value of <code>blue</code>, which indicates the shirt's color, or it can have the value of <code>small</code>, which indicates the shirt's size. You can use this field to filter records only if the <code>DataType</code> value in the related <code>AttributeDefinitionId</code> record is <code>Text</code>. If the <code>DataType</code> value is <code>Picklist</code>, use the value in the <code>AttributePicklistValueId</code> field for filtering. You can't use this field to filter records if the <code>DataType</code> value is <code>Checkbox</code>, <code>Currency</code>, <code>Date</code>, <code>Datetime</code>, <code>Multipicklist</code>, <code>Number</code>, or <code>Percent</code>.</p>

AssetTag

Associates a word or short phrase with an Asset.

Supported Calls

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

Fields

Field Name	Details
ItemId	<p>Type reference</p> <p>Properties Create, Filter</p> <p>Description ID of the tagged item.</p>
Name	<p>Type string</p> <p>Properties Create, Filter</p> <p>Description Name of the tag. If this value does not already exist, a new TagDefinition is created and becomes the parent of this Tag object. Otherwise, a TagDefinition with the same name becomes the parent of this Tag object. Parent relationships are created automatically.</p>
TagDefinitionId	<p>Type reference</p> <p>Properties Filter</p> <p>Description ID of the parent TagDefinition object that owns the tag.</p>
Type	<p>Type picklist</p> <p>Properties Create, Filter, Restricted picklist</p> <p>Description Defines the visibility of a tag. Valid values:</p> <ul style="list-style-type: none"> • <code>Public</code>—The tag can be viewed and manipulated by all users in an organization.

Field Name	Details
	<ul style="list-style-type: none"> <code>Personal</code>—The tag can be viewed or manipulated only by a user with a matching <code>OwnerId</code>.

Usage

AssetTag stores the relationship between its parent TagDefinition and the Asset being tagged. Tag objects act as metadata, allowing users to describe and organize their data.

When a tag is deleted, its parent TagDefinition will also be deleted if the name is not being used; otherwise, the parent remains. Deleting a TagDefinition sends it to the Recycle Bin, along with any associated tag entries.

AssetTokenEvent

The documentation has moved to [AssetTokenEvent](#) in the *Platform Events Developer Guide*.

AssetWarranty

Defines the warranty terms applicable to an asset along with any exclusions and extensions. This object is available in API version 50.0 and later.

Supported Calls

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

Fields

Field	Details
<code>AssetId</code>	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The ID of the asset this warranty term applies to.</p>
<code>AssetWarrantyNumber</code>	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The identifier of the asset warranty record.</p>

Field	Details
EndDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date on which this warranty term expires.</p>
ExchangeType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The type of exchange offered by this warranty term.</p>
Exclusions	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description Description of any exclusions.</p>
ExpensesCovered	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The percentage of expenses covered.</p>
ExpensesCoveredEndDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date on which cover for expenses ends.</p>
IsTransferable	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Defines whether the warranty term can be transferred to a new owner.</p>

Field	Details
LaborCovered	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The percentage of labor covered.</p>
LaborCoveredEndDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date on which cover for labor ends.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date when the asset warranty term was last modified. Its label in the user interface is <code>Last Modified Date</code>.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date when the asset warranty term was last viewed.</p>
PartsCovered	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The percentage of parts covered.</p>
PartsCoveredEndDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The date on which cover for parts ends.</p>
Pricebook2Id	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the price book item associated with this asset warranty term.</p>
StartDate	<p>Type date</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The date on which cover under this warranty term starts.</p>
WarrantyTermId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the warranty term this asset warranty term extends.</p>
WarrantyType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The type of the warranty.</p>

Associated Objects

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

[AssetWarrantyChangeEvent](#)

Change events are available for the object.

ApprovalSubmission

Represents the instance of an approval request that's submitted for a record of the related object. This object is available in API version 62.0 and later.

Supported Calls

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

Special Access Rules

This object is available in Enterprise, Unlimited, and Developer Editions of Revenue Cloud.

Fields

Field	Details
Comments	<p>Type textarea</p> <p>Properties Nillable</p> <p>Description The comments about the request that's submitted for approval.</p>
DoesSendApprovalEmail	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Required. Indicates whether approval request emails are sent to approvers and delegates (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
FlowOrchestrationInstanceId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The ID of the flow orchestration instance record that's associated with the approval. This field is a relationship field.</p> <p>Relationship Name FlowOrchestrationInstance</p> <p>Refers To FlowOrchestrationInstance</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p>

Field	Details
	<p>Description The auto-generated name for the approval submission.</p>
OwnerId	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description The ID of the user or the group that owns the approval submission record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
RelatedRecordId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Required. The ID of the related record that's submitted for approval. This field is a polymorphic relationship field.</p> <p>Relationship Name RelatedRecord</p> <p>Refers To Account, AdAvailabilityViewConfig, Address, AnalyticsUserAttrFuncTkn, ApprovalSubmission, ApprovalSubmissionDetail, ApprovalWorkItem, Asset, AssetAction, AssetActionSource, AssetContractRelationship, AssetRateAdjustment, AssetRateCardEntry, AssetRelationship, AssetStatePeriod, AssociatedLocation, AsyncOperationTracker, AttrPicklistExcludedValue, AttributeAdjustmentCondition, AttributeBasedAdjRule, AttributeBasedAdjustment, AttributeCategory, AttributeCategoryAttribute, AttributeDefinition, AttributePicklist, AttributePicklistValue, AuthorizationForm, AuthorizationFormConsent, AuthorizationFormDataUse, AuthorizationFormText, BatchJob, BatchJobPart, BatchJobPartFailedRecord, BundleBasedAdjustment, BusinessBrand, Case, CaseComment, ChannelProgram, ChannelProgramLevel, ChannelProgramMember, CollaborationGroup, CommSubscription, CommSubscriptionChannelType, CommSubscriptionConsent, CommSubscriptionTiming, Contact, ContactPointAddress, ContactPointConsent, ContactPointEmail, ContactPointPhone, ContactPointTypeConsent, ContactRequest, ContextDefinitionSync, Contract, ContractItemPrice, ContractItemPriceAdjTier, CostBook, CostBookEntry, Customer, DTRecordsetReplica, DataUseLegalBasis, DataUsePurpose, DecisionTblFileImportData, DelegatedAccount, DocGenerationQueryResult, DocTemplateSectionCondition, DocumentEnvelope, DocumentGenerationProcess, DocumentRecipient, DocumentTemplate, DocumentTemplateContentDoc,</p>

Field	Details
	<p>DocumentTemplateSection, DocumentTemplateToken, DuplicateRecordItem, DuplicateRecordSet, EmailMessage, EngagementChannelType, ExpressionSetConstraintObj, ExternalEventMapping, FlowOrchestrationInstance, FulfillmentOrder, FulfillmentOrderItemAdjustment, FulfillmentOrderItemTax, FulfillmentOrderLineItem, GeneratedDocument, GeneratedDocumentSection, Idea, Image, Individual, IntegrationProviderDcsnRqmt, IntegrationProviderExecution, Lead, Location, LocationTrustMeasure, ManagedContentVariant, ObjectStateDefinition, ObjectStateTransition, ObjectStateValue, Obligation, Opportunity, OpportunityRelatedDeleteLog, Order, OrderAction, OrderAdjustmentGroup, OrderDeliveryGroup, OrderDeliveryMethod, OrderItem, OrderItemAdjustmentLineItem, OrderItemDetail, OrderItemRateAdjustment, OrderItemRateCardEntry, OrderItemRecipient, OrderItemRelationship, OrderItemTaxLineItem, OrgMetricScanResult, OrgMetricScanSummary, Organization, PartnerFundAllocation, PartnerFundClaim, PartnerFundRequest, PartnerMarketingBudget, PartyConsent, PriceBookEntryDerivedPrice, PriceBookRateCard, PricingAdjBatchJob, PricingAdjBatchJobLog, PricingApiExecution, PricingProcessExecution, ProcessException, Product2, ProductAttributeDefinition, ProductCatalog, ProductCategory, ProductCategoryDisqual, ProductCategoryProduct, ProductCategoryQualification, ProductClassification, ProductClassificationAttr, ProductComponentGroup, ProductComponentGrpOverride, ProductConfigFlowAssignment, ProductConfigurationFlow, ProductConfigurationRule, ProductDisqualification, ProductPriceHistoryLog, ProductPriceRange, ProductQualification, ProductRampSegment, ProductRelComponentOverride, ProductUsageGrant, ProfileSkill, ProfileSkillEndorsement, ProfileSkillUser, PromptAction, PromptError, QuickText, QuickTextUsage, Quote, QuoteLineDetail, QuoteLineItem, QuoteLineItemRecipient, QuoteLineRateAdjustment, QuoteLineRateCardEntry, RateAdjustmentByAttribute, RateAdjustmentByTier, RateCard, RateCardEntry, RatingFrequencyPolicy, SalesTransactionType, Seller, Shipment, ShipmentItem, Site, SocialPersona, SocialPost, Solution, StreamingChannel, TableauHostMapping, Topic, UnitOfMeasure, UnitOfMeasureClass, UsageGrantRenewalPolicy, UsageGrantRolloverPolicy, UsageResource, UsageResourceBillingPolicy, User, UserEsignVendorIdentifier, UserLicense, UserLocalWebServerIdentity, UserProvisioningRequest, WorkBadge, WorkBadgeDefinition, WorkOrder, WorkOrderLineItem, WorkThanks</p>
RelatedRecordObjectName	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Required. The type of record that was submitted for approval.</p>
Status	<p>Type picklist</p> <p>Properties Filter, Group, Restricted picklist, Sort</p> <p>Description Required. The status of the approval. Valid values are:</p>

Field	Details
	<ul style="list-style-type: none"> • Approved • Canceled • Errored • InProgress • Recalled • Rejected • Suspended
SubmittedById	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Required. The ID of the user who submitted the record for approval. This field is a relationship field.</p> <p>Relationship Name SubmittedBy</p> <p>Refers To User</p>

Associated Objects

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

[ApprovalSubmissionOwnerSharingRule](#) on page 2180

Sharing rules are available for the object.

[ApprovalSubmissionShare](#) on page 2182

Sharing is available for the object.

BindingObjUsageRsrcPlcy

Represents the policies that are used for the usage resource that's associated with an asset or a binding object. 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
BindingObjectId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The object that's bounded with the quote line policy or order policy. This field is a polymorphic relationship field.</p> <p>Relationship Name BindingObject</p> <p>Refers To Account, Asset, BindingObjectCustomExt, Contract</p>
DrawdownOrder	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the order that's used to debit consumption of entitlements related to the usage resource from the usage entitlement bucket. Valid values are:</p> <ul style="list-style-type: none"> • ExpiringFirst • GrantedFirst • GrantedLast
EffectiveEndDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time until when the policy remains effective.</p>
EffectiveStartDate	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The date and time when the policy becomes effective.</p>


Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date when this record was last referenced.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The auto-generated identifier for the quote line item usage resource policy record. For example, BOURP-000004.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the owner of the binding object usage resource policy. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
RatingFrequencyPolicyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The rating frequency policy associated with the usage resource. This field is a relationship field.</p>

Field	Details
	<p>Relationship Name RatingFrequencyPolicy</p> <p>Refers To RatingFrequencyPolicy</p>
UsageAggregationPolicyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The usage aggregation policy associated with the usage resource. This field is a relationship field.</p> <p>Relationship Name UsageAggregationPolicy</p> <p>Refers To UsageResourceBillingPolicy</p>
UsageCommitmentPolicyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The usage commitment policy associated with the usage resource. This field is a relationship field.</p> <p>Relationship Name UsageCommitmentPolicy</p> <p>Refers To UsageCommitmentPolicy</p>
UsageOveragePolicyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The usage overage policy associated with the usage resource. This field is a relationship field.</p> <p>Relationship Name UsageOveragePolicy</p> <p>Refers To UsageOveragePolicy</p>

Field	Details
UsageResourceId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The usage resource associated with the usage product. This field is a relationship field.</p> <p>Relationship Name UsageResource</p> <p>Refers To UsageResource</p>

ContractItemPrice

Represents an object that's used to capture a price for a product on a contract. 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()`, `undelete()`, `update()`, `upsert()`

Special Access Rules

This object is available in Enterprise, Unlimited, and Developer Editions of Revenue Cloud.

Fields

Field	Details
AdjustmentMethod	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Method used to apply discount. Valid values are:</p> <ul style="list-style-type: none"> • Range—Apply the discount to all items after you reach the discount tier. For example, suppose that you give a 10% discount for 50 or more items. If a customer orders 50 products, and the type is <code>range</code>, apply the 10% discount to all 50 items.

Field	Details
	<ul style="list-style-type: none"> • <code>s1ab</code>—Apply discounts in tiers. For example, suppose that you order 30 products, and the type is <code>s1ab</code>, you can apply a 10% discount to units 1-9, a 20% discount to units 10-19, and a 30% discount to units 20-30.
ContractId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description ID of the contract. This field is a relationship field.</p> <p>Relationship Name Contract</p> <p>Relationship Type Master-detail</p> <p>Refers To Contract (the master object)</p>
DiscountType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Type of discount to apply, which is a percentage of the price or an amount. Valid values are:</p> <ul style="list-style-type: none"> • <code>AdjustmentAmount</code> • <code>AdjustmentPercentage</code>
DiscountValue	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Value of the discount to apply based on the discount type.</p>
EndDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description End date and time of the relationship between the contract and contract item price.</p>

Field	Details
ItemId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description ID of the product or product category related to a price in a contract. This field is a polymorphic relationship field.</p> <p>Relationship Name Item</p> <p>Relationship Type Lookup</p> <p>Refers To Product2, ProductCategory</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp when the current user last accessed this record, a record related to this record, or a list view.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp when the current user last viewed this record or list view. If this value is null, the user accessed this record or list view (<code>LastReferencedDate</code>) but didn't view it.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Auto-generated number assigned to the contract item price. (Read Only)</p>
Price	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p>

Field	Details
	<p>Description Unit price for the product sold as part of the contract.</p>
ProductSellingModelId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Product selling model for the product associated with the price. This field is a relationship field.</p> <p>Relationship Name ProductSellingModel</p> <p>Relationship Type Lookup</p> <p>Refers To ProductSellingModel</p>
SellingModelType	<p>Type picklist</p> <p>Properties Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Selling mode type to specify whether the product is sold as a one-time sale, an evergreen subscription, or a subscription with a defined term. Valid values are:</p> <ul style="list-style-type: none"> • Evergreen • OneTime • TermDefined <p>This value is derived from the product selling model.</p>
StartDate	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description Start date and time of the relationship between the contract and contract item price.</p>

Associated Objects

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

[ContractItemPriceHistory](#) on page 825

History is available for tracked fields of the object.

ContractItemPriceAdjTier

Represents the tiers of a price adjustment to a product on a contract. This object is available in API version 63.0 and later.

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

Supported Calls

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

Special Access Rules

This object is available with Revenue Cloud.

Fields

Field	Details
<code>ContractItemId</code>	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The contract item price ID associated with the contract item price adjustment tier. This field is a relationship field.</p> <p>Relationship Name ContractItemPrice</p> <p>Relationship Type Master-detail</p> <p>Refers To ContractItemPrice (the master object)</p>
<code>LastReferencedDate</code>	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	<p>Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Timestamp when the current user last viewed this record or list view. If this value is null, the user accessed this record or list view (LastReferencedDate) but didn't view it.</p>
LowerBound	<p>Type double</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The minimum quantity for the adjustment to be applicable.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the record.</p>
TierType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The type of adjustment tier. Valid values are:</p> <ul style="list-style-type: none"> • AdjustmentAmount • AdjustmentPercentage • OverrideAmount
TierValue	<p>Type double</p> <p>Properties Create, Filter, Sort, Update</p>

Field	Details
	<p>Description The price adjustment value.</p>
UpperBound	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The maximum quantity for the adjustment to be applicable.</p>

Associated Objects

This object has 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.

[ContractItemPriceAdjTierFeed](#)

Feed tracking is available for the object.

[ContractItemPriceAdjTierHistory](#)

History is available for tracked fields of the object.

ContractItemPriceHistory

Represents the history of changes to the values in the fields of a ContractItemPrice object. This object is available in API version 61.0 and later.

Supported Calls

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

Special Access Rules

This object is available in Enterprise, Unlimited, and Developer Editions of Revenue Cloud.

Fields

Field	Details
ContractItemPriceId	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description ID of the ContractItemPrice record.</p>

Field	Details
	<p>This field is a relationship field.</p> <p>Relationship Name ContractItemPrice</p> <p>Relationship Type Lookup</p> <p>Refers To ContractItemPrice</p>
DataType	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Data type of the field that was changed.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • Address • AnyType • AutoNumber • Base64 • BitVector • Boolean • Content • Currency • DataCategoryGroupReference • DateOnly • DateTime • Division • Double • DynamicEnum • Email • EncryptedBase64 • EncryptedText • EntityId • EnumOrId • ExternalId • Fax • File • HtmlMultiLineText • HtmlStringPlusClob

Field	Details
	<ul style="list-style-type: none"> • InetAddress • Json • Location • MultiEnum • MultiLineText • Namespace • Percent • PersonName • Phone • Raw • RecordType • SfdcEncryptedText • SimpleNamespace • StringPlusClob • Switchable_PersonName • Text • TimeOnly • Url • YearQuarter
Field	<p data-bbox="527 1102 592 1134">Type</p> <p data-bbox="568 1144 641 1176">picklist</p> <p data-bbox="527 1186 649 1218">Properties</p> <p data-bbox="568 1228 917 1260">Filter, Group, Restricted picklist, Sort</p> <p data-bbox="527 1270 665 1302">Description</p> <p data-bbox="568 1312 917 1344">Name of the field that was changed.</p> <p data-bbox="568 1354 763 1386">Possible values are:</p> <ul style="list-style-type: none"> • AdjustmentMethod • Contract • DiscountType • DiscountValue • EndDate • Item • Name • Price • ProductSellingModel • StartDate • created

Field	Details
	<ul style="list-style-type: none"> • customPersonMerged • feedEvent • individualMerged • locked—Record locked. • ownerAccepted—Owner (Accepted) • ownerAssignment—Owner (Assignment) • unlocked—Record unlocked.
NewValue	<p>Type anyType</p> <p>Properties Nillable, Sort</p> <p>Description New value of the field that was changed.</p>
OldValue	<p>Type anyType</p> <p>Properties Nillable, Sort</p> <p>Description Latest value of the field before it was changed.</p>

OrderDeliveryMethod

Shows the customizations and options that a buyer selected for their delivery method. 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()`

Special Access Rules

To access Commerce Orders entities, your org must have a Salesforce Order Management license. Commerce Orders entities are available only in Lightning Experience.

Fields

Field	Details
Carrier	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The carrier that the buyer chose for their delivery method. Developers must add values to this field.</p>
ClassOfService	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The carrier class of service that the buyer chose for their delivery method. Developers must add values to this field.</p>
Description	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description Description of the delivery method.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Assign new delivery groups to active delivery methods.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
LastViewedDate	<p>Type dateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record. If this value is null, this record might only have been referenced (LastReferencedDate) and not viewed.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Required. Default name of this record.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The user who owns an order delivery method record.</p>
ProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Optional. This product represents a delivery charge order product for a delivery using this delivery method. For example, you could create a product that represents an overnight express charge and assign it to an overnight express delivery method.</p>
ReferenceNumber	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Reference number for an external delivery method.</p>
ShippingCarrierMethod	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description</p> <p>Optional. A specific shipping service provided by a shipping carrier, such as Ground, 2Day, and NextDay. Depends on the range of transit times available for each carrier.</p>

Associated Objects

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

[OrderDeliveryMethodChangeEvent](#) (API version 62.0)

Change events are available for the object.

OrderItemAttribute

Represents a virtual object that stores an attribute specified for an order item. This object is available in API version 60.0 and later.

Supported Calls

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

Special Access Rules

This object is available in Enterprise, Unlimited, and Developer Editions of Revenue Cloud.

Fields

Field	Details
AttributeDefinitionId	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Create, Filter, Group, Sort, Update</p> <p>Description</p> <p>The ID of the attribute definition for this order item attribute.</p> <p>This field is a relationship field.</p> <p>Relationship Name</p> <p>AttributeDefinition</p> <p>Relationship Type</p> <p>Lookup</p> <p>Refers To</p> <p>AttributeDefinition</p>

Field	Details
AttributeName	<p>Type string</p> <p>Properties Filter, Group, idLookup, Nillable, Sort</p> <p>Description The name given to order item attribute.</p>
AttributePicklistValueId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the attribute picklist value if the attribute is a picklist type. This field is a relationship field.</p> <p>Relationship Name AttributePicklistValue</p> <p>Relationship Type Lookup</p> <p>Refers To AttributePicklistValue</p>
AttributeValue	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Stores the value of the order item attribute. For example 5-TB storage. You can use this field to filter records only if the DataType value in the related AttributeDefinitionId record is Text. If the DataType value is Picklist, use the value in the AttributePicklistValueId field for filtering. You can't use this field to filter records if the DataType value is Checkbox, Currency, Date, Datetime, Multipicklist, Number, or Percent.</p>
ExternalId	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description An auto-generated ID of the attribute record saved in an external system (for example an HBase database).</p>

Field	Details
OrderItemId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The parent order item associated with the order item attribute. This field is a relationship field.</p> <p>Relationship Name OrderItem</p> <p>Relationship Type Lookup</p> <p>Refers To OrderItem</p>

OrderItemDetail

Represents the breakdown details of an order product. Revenue Cloud generates these records to capture pricing and quantity changes, such as negative quantity reductions, early renewals, derived pricing or repricing during an amendment, and bundle or product attribute reconfigurations. This object is available in API version 60.0 and later.

Supported Calls

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

Special Access Rules

This object is available in Enterprise, Unlimited, and Developer Editions of Revenue Cloud.

Fields

Field	Details
BillingReference	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Reference to the original order item for which this amend or cancel record is created.</p>
EffectiveFrom	<p>Type dateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The date when the transaction becomes effective.</p>
EffectiveTo	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date when the transaction ends.</p>
LineNumber	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The line number of the detail record.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the record.</p>
NetUnitPrice	<p>Type currency</p> <p>Properties Filter, Sort</p> <p>Description The unit price of the item that's calculated after applying any discounts and before tax calculation.</p>
OrderItemId	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description The ID of the related order item. This field is a relationship field.</p>

Field	Details
	<p>Relationship Name OrderItem</p> <p>Relationship Type Lookup</p> <p>Refers To OrderItem</p>
PriceWaterfallIdentifier	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The price waterfall identifier generated by Salesforce Pricing that's associated with the pricing of the detail record.</p>
Quantity	<p>Type double</p> <p>Properties Filter, Sort</p> <p>Description The quantity specified for the item in the detail record.</p>
ReferenceDate	<p>Type date</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The reference date of the item. For example, the start date of the subscription that's associated with the detail record.</p>
ReferenceNumber	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The reference number of the item. For example, the order number that's associated with the detail record.</p>
TotalLineAmount	<p>Type currency</p> <p>Properties Filter, Sort</p>

Field	Details
	<p>Description</p> <p>The net total price of the order product, before price adjustments, inclusive of quantity and subscription term.</p>
TotalPrice	<p>Type</p> <p>currency</p> <p>Properties</p> <p>Filter, Sort</p> <p>Description</p> <p>The total price of the item in the detail record that's calculated using the quantity, net unit price, and after applying the pricing terms.</p>
UnitPrice	<p>Type</p> <p>currency</p> <p>Properties</p> <p>Filter, Sort</p> <p>Description</p> <p>The unit price of the item before any discounts or tax calculation.</p>

OrderItemRateAdjustment

Represents the negotiated rate adjustment for an order product. This object is available in API version 62.0 and later.

Supported Calls

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

Special Access Rules

This object is available with Revenue Cloud.

Fields


Field	Details
AdjustmentType	<p>Type</p> <p>picklist</p> <p>Properties</p> <p>Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description</p> <p>Specifies the type of rate adjustment.</p>

Field	Details
	<p>Possible values are:</p> <ul style="list-style-type: none"> • Amount • Override • Percentage
AdjustmentValue	<p>Type double</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The value of the adjustment.</p>
LowerBound	<p>Type double</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The minimum quantity for the adjustment to be applicable.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the order item rate adjustment.</p>
OrderItemRateCardEntryId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The parent order item rate card entry associated with the order item rate adjustment. This field is a relationship field.</p> <p>Relationship Name OrderItemRateCardEntry</p> <p>Relationship Type Master-detail</p> <p>Refers To OrderItemRateCardEntry (the master object)</p>

Field	Details
UpperBound	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The quantity below which the adjustment must be applicable. For example, if you want the adjustment to be applicable when the quantity is 99 or less, set this value to 100.</p>

OrderItemRateCardEntry

Represents the catalog and negotiated rates of a usage metric associated with an order item that's used to charge overage consumption. This object is available in API version 62.0 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()`, `update()`, `upsert()`

Special Access Rules

This object is available with Revenue Cloud.

Fields


Field	Details
IsChosenRate	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether this rate is the chosen rate for the associated binding target and usage resource (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>. Available in API version 64.0 and later.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p>

Field	Details
	<p>Description An auto-generated number assigned to the order item rate card entry record.</p>
NegotiatedRate	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The base negotiated rate used to charge overage consumption.</p>
OrderItemId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The parent order item associated with the order item rate card entry. This field is a relationship field.</p> <p>Relationship Name OrderItem</p> <p>Relationship Type Master-detail</p> <p>Refers To OrderItem (the master object)</p>
RateCardEntryId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The rate card entry containing catalog rates that's associated with the order item rate card entry. This field is a relationship field.</p> <p>Relationship Name RateCardEntry</p> <p>Refers To RateCardEntry</p>
RateCardId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p>

Field	Details
	<p>Description The rate card associated with the order item rate card entry. This field is a relationship field.</p> <p>Relationship Name RateCard</p> <p>Refers To RateCard</p>
RateUnitOfMeasureId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The standard unit of measure containing the unit for the negotiated rate that's associated with the order item rate card entry. This field is a relationship field.</p> <p>Relationship Name RateUnitOfMeasure</p> <p>Refers To UnitOfMeasure</p>
UsageResourceId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The usage resource associated with the order item rate card entry. This field is a relationship field.</p> <p>Relationship Name UsageResource</p> <p>Refers To UsageResource</p>

OrderItemUsageRsrcGrant

Represents the negotiated grants for the usage resource that's associated with the usage product added in the order item. This object is available in API version 65.0 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()`, `update()`, `upsert()`

Fields

Field	Details
GrantQuantity	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The granted or negotiated quantity of a usage resource associated with the usage product.</p>
GrantType	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies the type of model that defines how the usage resource is consumed. Valid values are:</p> <ul style="list-style-type: none"> • Commit • Grant <p>The default value is Grant.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The auto-generated identifier for the order item usage resource grant record. For example, OIURG-00004 or OIURG-4567.</p>
OrderItemId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The order item associated with the usage product. This field is a relationship field.</p>

Field	Details
	<p>Relationship Name OrderItem</p> <p>Relationship Type Master-detail</p> <p>Refers To OrderItem (the master object)</p>
ProductUsageGrantId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The product usage grant associated with the order item. This field is a relationship field.</p> <p>Relationship Name ProductUsageGrant</p> <p>Refers To ProductUsageGrant</p>
TokenResourceId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The usage resource of category Token associated with the usage resource related to the usage product added in the order item. This field is a relationship field.</p> <p>Relationship Name TokenResource</p> <p>Refers To UsageResource</p>
UsageGrantRefreshPolicyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The usage grant refresh policy associated with the usage resource related to the usage product added in the order item. This field is a relationship field.</p>

Field	Details
	<p>Relationship Name UsageGrantRefreshPolicy</p> <p>Refers To UsageGrantRenewalPolicy</p>
UsageGrantRolloverPolicyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The usage grant rollover policy associated with the usage resource related to the usage product added in the order item. This field is a relationship field.</p> <p>Relationship Name UsageGrantRolloverPolicy</p> <p>Refers To UsageGrantRolloverPolicy</p>
UsageResourceId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The usage resource associated with the usage product that's added in the order item. This field is a relationship field.</p> <p>Relationship Name UsageResource</p> <p>Refers To UsageResource</p>
ValidityPeriodTerm	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The duration for which the usage resource grant is valid, when used with the validity period units.</p>
ValidityPeriodUnit	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The length of a validity period for the usage resource grant, when used with the validity period term.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • Month • None • Year

OrderItemUsageRsrcPlcy

Represents the policies that are used for the usage resource that's associated with the usage product added in the order item. This object is available in API version 65.0 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()`, `update()`, `upsert()`

Fields

Field	Details
DrawdownOrder	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the order that's used to debit consumption of entitlements related to the usage resource from the usage entitlement bucket.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • ExpiringFirst • GrantedFirst • GrantedLast
Name	<p>Type string</p>

Field	Details
	<p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description An auto-generated number assigned to the order item for usage product grant record. For example, OIURG-4567</p>
OrderItemId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The order item associated with the usage product. This field is a relationship field.</p> <p>Relationship Name OrderItem</p> <p>Relationship Type Master-detail</p> <p>Refers To OrderItem (the master object)</p>
ProductUsageResourcePolicyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The product usage resource policy associated with the usage resource related to the usage product added in the order item. This field is a relationship field.</p> <p>Relationship Name ProductUsageResourcePolicy</p> <p>Refers To ProductUsageResourcePolicy</p>
RatingFrequencyPolicyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The rating frequency policy associated with the usage resource related to the usage product added in the order item. This field is a relationship field.</p>

Field	Details
	<p>Relationship Name RatingFrequencyPolicy</p> <p>Refers To RatingFrequencyPolicy</p>
UsageAggregationPolicyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The usage aggregation policy associated with the usage resource related to the usage product added in the order item. This field is a relationship field.</p> <p>Relationship Name UsageAggregationPolicy</p> <p>Refers To UsageResourceBillingPolicy</p>
UsageCommitmentPolicyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The usage commitment policy associated with the usage resource related to the usage product added in the order item. This field is a relationship field.</p> <p>Relationship Name UsageCommitmentPolicy</p> <p>Refers To UsageCommitmentPolicy</p>
UsageOveragePolicyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The usage overage policy associated with the usage resource related to the usage product added in the order item. This field is a relationship field.</p> <p>Relationship Name UsageOveragePolicy</p>

Field	Details
	Refers To UsageOveragePolicy
UsageResourceId	Type reference Properties Create, Filter, Group, Sort, Update Description The usage resource associated with the usage product that's added in the order item. This field is a relationship field. Relationship Name UsageResource Refers To UsageResource

SalesTransactionType

Represents the type of the sales transaction. 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

This object is available in Enterprise, Unlimited, and Developer Editions of Revenue Cloud.

Fields

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

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>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 but not viewed it directly.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the sales transaction type.</p>

QuoteAction

Indicates the type of sales transaction that's being quoted; for example, a renewal sale. This object is available in API version 59.0 and later.

If a quote doesn't have a quote action, Salesforce treats it as a quote of the `Add` type. When such a quote is used to create an order, Salesforce automatically creates an order action of the `Add` type.

Supported Calls

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

Special Access Rules

This object is available in orgs with Subscription Management or Revenue Cloud. It's also available in Industries Automotive and Industries Field Service.

Fields

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

Field	Details
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, the user accessed this record or list view indirectly, but didn't view it.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name given to the quote action.</p>
QuoteId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The quote related to this quote action. This field is a relationship field.</p> <p>Relationship Name Quote</p> <p>Relationship Type Lookup</p> <p>Refers To Quote</p>
SourceAssetId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The asset changed by this sales transaction. For example, if the quote action is a quantity amendment, this field contains the ID of the asset that's amended. This field is a relationship field.</p> <p>Relationship Name SourceAsset</p> <p>Relationship Type Lookup</p>

Field	Details
	<p>Refers To Asset</p>
Subtype	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The subtype of the action on the quote line item. Valid values are:</p> <ul style="list-style-type: none"> • FieldAmendment • Rollback • StartDateAdjustment • TransferFrom • TransferTo <p>This field is available with Revenue Cloud in API version 64.0 and later.</p>
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort</p> <p>Description The type of sales transaction that the related quote is for. Valid values are:</p> <ul style="list-style-type: none"> • Add • Amend • Cancel • No Change • Renew • Transfer—Available with Revenue Cloud in API version 65.0 and later.

QuoteLineDetail

Represents the breakdown details of a quote line item. Revenue Cloud generates these records to capture pricing and quantity changes, such as negative quantity reductions, early renewals, derived pricing or repricing during an amendment, and bundle or product attribute reconfigurations. This object is available in API version 60.0 and later.

Supported Calls

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

Special Access Rules

This object is available in Enterprise, Unlimited, and Developer Editions of Revenue Cloud.

Fields

Field	Details
BillingReference	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Reference to the original order item for which this amend or cancel record is created.</p>
EffectiveFrom	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date when the transaction becomes effective.</p>
EffectiveTo	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date when the transaction ends.</p>
LineNumber	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The line number of the detail record.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the record.</p>

Field	Details
NetUnitPrice	<p>Type currency</p> <p>Properties Filter, Sort</p> <p>Description The unit price of the item that's calculated after applying any discounts and before tax calculation.</p>
PriceWaterfallIdentifier	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The price waterfall identifier generated by Salesforce Pricing that's associated with the pricing of the detail record.</p>
Quantity	<p>Type double</p> <p>Properties Filter, Sort</p> <p>Description The quantity specified for the item in the detail record.</p>
QuoteLineItemId	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description The ID of the related quote line. This field is a relationship field.</p> <p>Relationship Name QuoteLineItem</p> <p>Relationship Type Lookup</p> <p>Refers To QuoteLineItem</p>
ReferenceDate	<p>Type date</p> <p>Properties Filter, Group, Nillable, Sort</p>

Field	Details
	<p>Description The reference date of the item. For example, the start date of the subscription that's associated with the detail record.</p>
ReferenceNumber	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The reference number of the item. For example, the order number that's associated with the detail record.</p>
TotalLineAmount	<p>Type currency</p> <p>Properties Filter, Sort</p> <p>Description The net total price of the order product, before price adjustments, inclusive of quantity and the subscription term.</p>
TotalPrice	<p>Type currency</p> <p>Properties Filter, Sort</p> <p>Description The total price of the item in the detail record that's calculated using the quantity, net unit price, and after applying the pricing terms.</p>
UnitPrice	<p>Type currency</p> <p>Properties Filter, Sort</p> <p>Description The unit price of the item before any discounts or tax calculation.</p>

QuoteLineGroup

Stores the group information for line items in a quote. It also stores the aggregated line field information (subtotal). It contains a parent-child relationship to quote. This object is available in API version 61.0 and later.

Supported Calls

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

Fields

Field	Details
Description	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The description of the group.</p>
Discount	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The optional discount percentage, specified by the sales representative at the group level.</p>
DiscountAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The optional discount amount, specified by the sales representative at the group level.</p>
EndDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The end date of the group ramp segment.</p>
IsRamped	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates whether the group is a group ramp segment, which is a period in a group ramp deal with specific prices and volume.</p>

Field	Details
	The default value is <code>false</code> .
Margin	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The optional margin percentage, specified by the sales representative at the group level.</p>
MarginAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The optional margin amount, specified by the sales representative at the group level. This amount can also be considered as the summary margin amount calculated by subtracting the total cost from the summary subtotal.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the group.</p>
ParentQuoteLineGroupId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the parent group for a nested quote line group. This field is a relationship field.</p> <p>Relationship Name ParentQuoteLineGroup</p> <p>Refers To QuoteLineGroup</p>
QuoteId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p>

Field	Details
	<p>Description The ID of the related quote. This field is a relationship field.</p> <p>Relationship Name Quote</p> <p>Relationship Type Master-detail</p> <p>Refers To Quote (the master object)</p>
SegmentType	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description The duration type of the segment. Possible values are:</p> <ul style="list-style-type: none"> • Custom • Yearly
SortOrder	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description</p>
StartDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The start date of the group ramp segment.</p>
SummarySubtotal	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The aggregated subtotal amount of nested group lines.</p>

Field	Details
SummaryTotalAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The aggregated total amount of nested group lines before any discounts are applied.</p>
TotalAdjustment	<p>Type percent</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The total discount percentage applied at the group level. This percentage is calculated by using the formula: $(\text{Summary Total Amount} - \text{Summary Subtotal}) / \text{Summary Total Amount}$.</p>
TotalAdjustmentAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The total discount amount at the group level. This amount is calculated by subtracting the summary subtotal from the summary total amount.</p>
TotalCost	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The aggregated total cost of nested group lines.</p>
TotalMargin	<p>Type percent</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The summary margin percentage at the line item level. This percentage is calculated by using the formula: $(\text{Summary Subtotal} - \text{Total Cost}) / \text{Summary Subtotal}$.</p>
TotalMarginAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	<p>Description</p> <p>The summary margin amount calculated at the group level.</p>
Type	<p>Type</p> <p>picklist</p> <p>Properties</p> <p>Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description</p> <p>The type of quote line group.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • AssetDowngrade • AssetSwap • AssetUpgrade • CPQQuoteGroup—CPQ Line Grouping • RampScheduleGroup <p>The default value is CPQQuoteGroup.</p>

QuoteLineItemAttribute

Represents a virtual object that stores an attribute specified for a quote line item. This object is available in API version 59.0 and later.



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

Supported Calls

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

Special Access Rules

This object is available in Enterprise, Unlimited, and Developer Editions of Revenue Cloud.

Fields

Field	Details
AttributeDefinitionId	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description The ID of the attribute definition for this quote line item attribute. This field is a relationship field.</p> <p>Relationship Name AttributeDefinition</p> <p>Refers To AttributeDefinition</p>
AttributeName	<p>Type string</p> <p>Properties Filter, Group, idLookup, Nillable, Sort</p> <p>Description The name of the quote line item attribute.</p>
AttributePicklistValueId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the attribute picklist value if the attribute is a picklist type. This field is a relationship field.</p> <p>Relationship Name AttributePicklistValue</p> <p>Refers To AttributePicklistValue</p>
AttributeValue	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The value of the quote line item attribute. For example 5-TB storage. You can use this field to filter records only if the DataType value in the related AttributeDefinitionId record is Text. If the DataType value is Picklist, use the value in the AttributePicklistValueId field for filtering. You can't use this field to filter records if the DataType value is Checkbox, Currency, Date, Datetime, Multipicklist, Number, or Percent.</p>
ExternalId	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description An auto-generated ID of the attribute record saved in an external system, such as an HBase database.</p>
QuoteLineItemId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The associated parent quote line item. This field is a relationship field.</p> <p>Relationship Name QuoteLineItem</p> <p>Relationship Type Master-detail</p> <p>Refers To QuoteLineItem (the master object)</p>

QuoteLineItemUseRsrcGrant

Represents the negotiated grants for the usage resource that's associated with the usage product added in the quote line item. This object is available in API version 65.0 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
GrantQuantity	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p>

Field	Details
	<p>Description The granted or negotiated quantity of a usage resource associated with the usage product.</p>
GrantType	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies the type of model that defines how the usage resource is consumed. Valid values are:</p> <ul style="list-style-type: none"> • Commit • Grant <p>The default value is Grant.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date when this record was last referenced.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The auto-generated identifier for the quote line item usage resource grant record. For example, QLIURG-00004 or QLIURG-4567.</p>
ProductUsageGrantId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The product usage grant associated with the quote line item. This field is a relationship field.</p> <p>Relationship Name ProductUsageGrant</p> <p>Refers To ProductUsageGrant</p>
QuoteLineItemId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The quote line item associated with the usage product. This field is a relationship field.</p> <p>Relationship Name QuoteLineItem</p> <p>Relationship Type Master-detail</p> <p>Refers To QuoteLineItem (the master object)</p>
TokenResourceId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The usage resource of category Token associated with the usage resource related to the usage product added in the order item. This field is a relationship field.</p> <p>Relationship Name TokenResource</p> <p>Refers To UsageResource</p>
UsageGrantRefreshPolicyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The usage grant refresh policy associated with the usage resource related to the usage product added in the quote line item. This field is a relationship field.</p> <p>Relationship Name UsageGrantRefreshPolicy</p> <p>Refers To UsageGrantRenewalPolicy</p>
UsageGrantRolloverPolicyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The usage grant rollover policy associated with the usage resource related to the usage product added in the quote line item. This field is a relationship field.</p> <p>Relationship Name UsageGrantRolloverPolicy</p> <p>Refers To UsageGrantRolloverPolicy</p>
UsageResourceId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The usage resource associated with the usage product that's added as the quote line item. This field is a relationship field.</p> <p>Relationship Name UsageResource</p> <p>Refers To UsageResource</p>
ValidityPeriodTerm	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The duration for which the usage resource grant is valid, when used with the validity period units.</p>

Field	Details
ValidityPeriodUnit	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The length of a validity period for the usage resource grant, when used with the validity period term.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • Month • None • Year

QuotLineItemUsageRsrcPlcy

Represents the policies that are used for the usage resource that's associated with the usage product added in the quote line item. This object is available in API version 65.0 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
DrawdownOrder	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the order that's used to debit consumption of entitlements related to the usage resource from the usage entitlement bucket.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • ExpiringFirst • GrantedFirst • GrantedLast

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date when this record was last referenced.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The auto-generated identifier for the quote line item usage resource policy record. For example, QLIURP-00004 or QLIURP-4567.</p>
ProductUsageResourcePolicyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The product usage resource policy associated with the quote line item. This field is a relationship field.</p> <p>Relationship Name ProductUsageResourcePolicy</p> <p>Refers To ProductUsageResourcePolicy</p>
QuoteLineItemId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The quote line item associated with the usage product. This field is a relationship field.</p>

Field	Details
	<p>Relationship Name QuoteLineItem</p> <p>Relationship Type Master-detail</p> <p>Refers To QuoteLineItem (the master object)</p>
RatingFrequencyPolicyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The rating frequency policy associated with the usage resource related to the usage product added in the quote line item. This field is a relationship field.</p> <p>Relationship Name RatingFrequencyPolicy</p> <p>Refers To RatingFrequencyPolicy</p>
UsageAggregationPolicyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The usage aggregation policy associated with the usage resource related to the usage product added in the quote line item. This field is a relationship field.</p> <p>Relationship Name UsageAggregationPolicy</p> <p>Refers To UsageResourceBillingPolicy</p>
UsageCommitmentPolicyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The usage commitment policy associated with the usage resource related to the usage product added in the quote line item. This field is a relationship field.</p>

Field	Details
	<p>Relationship Name UsageCommitmentPolicy</p> <p>Refers To UsageCommitmentPolicy</p>
UsageOveragePolicyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The usage overage policy associated with the quote line item. This field is a relationship field.</p> <p>Relationship Name UsageOveragePolicy</p> <p>Refers To UsageOveragePolicy</p>
UsageResourceId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The usage resource associated with the usage product that's added in the quote line item. This field is a relationship field.</p> <p>Relationship Name UsageResource</p> <p>Refers To UsageResource</p>

QuoteLineRateAdjustment

Represents the negotiated rate adjustment for a quote line item. This object is available in API version 62.0 and later.

Supported Calls

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

Special Access Rules

This object is available with Revenue Cloud.


Fields

Field	Details
AdjustmentType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies the type of rate adjustment. Possible values are:</p> <ul style="list-style-type: none"> • Amount • Override • Percentage
AdjustmentValue	<p>Type double</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The value of the adjustment.</p>
LowerBound	<p>Type double</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The minimum quantity for the adjustment to be applicable.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the quote line rate adjustment record.</p>
QuoteLineRateCardEntryId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The parent quote line rate card entry associated with the quote line rate adjustment. This field is a relationship field.</p>

Field	Details
	<p>Relationship Name QuoteLineRateCardEntry</p> <p>Relationship Type Master-detail</p> <p>Refers To QuoteLineRateCardEntry (the master object)</p>
UpperBound	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The quantity below which the adjustment must be applicable. For example, if you want the adjustment to be applicable when the quantity is 99 or less, set this value to 100.</p>

QuoteLineRateCardEntry

Represents the catalog and negotiated rates of a usage resource associated with a quote line item that's used to charge overage consumption. This object is available in API version 62.0 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()`, `update()`, `upsert()`

Fields

Field	Details
IsChosenRate	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether this rate is the chosen rate for the associated binding target and usage resource (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>. Available in API version 64.0 and later.</p>
Name	<p>Type string</p>

Field	Details
	<p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description An auto-generated number assigned to the quote line rate card entry record.</p>
NegotiatedRate	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The base negotiated rate used to charge overage consumption.</p>
QuoteLineItemId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The parent quote line item associated with the quote line rate card entry. This field is a relationship field.</p> <p>Relationship Name QuoteLineItem</p> <p>Relationship Type Master-detail</p> <p>Refers To QuoteLineItem (the master object)</p>
RateCardEntryId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The rate card entry containing catalog rates that's associated with the quote line rate card entry. This field is a relationship field.</p> <p>Relationship Name RateCardEntry</p> <p>Refers To RateCardEntry</p>
RateCardId	<p>Type reference</p>

Field	Details
	<p>Properties Filter, Group, Nillable, Sort</p> <p>Description The rate card associated with the quote line rate card entry. This field is a relationship field.</p> <p>Relationship Name RateCard</p> <p>Refers To RateCard</p>
RateUnitOfMeasureId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The standard unit of measure containing the unit for the negotiated rate that's associated with the quote line rate card entry. This field is a relationship field.</p> <p>Relationship Name RateUnitOfMeasure</p> <p>Refers To UnitOfMeasure</p>
UsageResourceId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The usage resource associated with the quote line rate card entry. This field is a relationship field.</p> <p>Relationship Name UsageResource</p> <p>Refers To UsageResource</p>

Transaction Management Fields on Standard Objects

Transaction Management adds standard and custom fields to some standard Salesforce objects. These fields are available only in orgs where Transaction Management is enabled.

[Transaction Management Fields on Object State Definition](#)

Standard and custom fields extend the standard Object State Definition object for use in Transaction Management to represent the object state model for a particular status field for an entity. This object is available in API version 60.0 and later.

[Transaction Management Fields on Object State Transition](#)

Standard and custom fields extend the standard Object State Transition object for use in Transaction Management to define the valid transition between two statuses. This object is available in API version 60.0 and later.

[Transaction Management Fields on Object State Value](#)

Standard and custom fields extend the standard Object State Transition object for use in Transaction Management. This object is available in API version 60.0 and later.

[Transaction Management Fields on Order](#)

Standard and custom fields extend the standard Order object for use in Transaction Management.

[Transaction Management Fields on Order Item](#)

Standard and custom fields extend the standard Order Item object for use in Transaction Management.

[Transaction Management Fields on Order Item Group](#)

Standard and custom fields extend the standard Order Item Group object for use in Transaction Management.

[Transaction Management Fields on Order Action](#)

Standard and custom fields extend the standard Order Action object for use in Transaction Management. This object is available in API version 55.0 and later.

[Transaction Management Fields on Order Item Relationship](#)

Standard and custom fields extend the standard Order Item Relationship object for use in Transaction Management. This object is available in API version 58.0 and later.

[Transaction Management Fields on Quote](#)

Standard and custom fields extend the standard Quote object for use in Transaction Management to represent information about quotes. This object is available in API version 60.0 and later.

[Transaction Management Fields on Quote Line Group](#)

Standard and custom fields extend the standard Quote Line Group object for use in Transaction Management.

[Transaction Management Fields on Quote Line Item](#)

Standard and custom fields extend the standard Quote Line Item object for use in Transaction Management to represent information about line items in a quote. This object is available in API version 60.0 and later.

[Transaction Management Fields on Quote Document](#)

Standard and custom fields extend the standard Quote Document object for use in Transaction Management to represent information about quote documents. This object is available in API version 61.0 and later.

Transaction Management Fields on Object State Definition

Standard and custom fields extend the standard Object State Definition object for use in Transaction Management to represent the object state model for a particular status field for an entity. This object is available in API version 60.0 and later.

Fields

Field	Details
AppUsageType	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description This field indicates under which AppUsageType the transition applies to. For example, ObjectStateDefinition associated with "Revenue Lifecycle Management" AppUsageType will apply to quotes, assets, or orders associated with "Revenue Lifecycle Management".</p>

Transaction Management Fields on Object State Transition

Standard and custom fields extend the standard Object State Transition object for use in Transaction Management to define the valid transition between two statuses. This object is available in API version 60.0 and later.

Fields

Field	Details
CustomPermissionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the associated custom permission. This field is a relationship field.</p> <p>Relationship Name CustomPermission</p> <p>Relationship Type Lookup</p> <p>Refers To CustomPermission</p>

Transaction Management Fields on Object State Value

Standard and custom fields extend the standard Object State Transition object for use in Transaction Management This object is available in API version 60.0 and later.

Fields

Field	Details
CustomPermissionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the associated custom permission. This field is a relationship field.</p> <p>Relationship Name CustomPermission</p> <p>Relationship Type Lookup</p> <p>Refers To CustomPermission</p>

Transaction Management Fields on Order

Standard and custom fields extend the standard Order object for use in Transaction Management.

Fields

Field	Details
AdjustmentDistributionLogic	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies how the overall discount amount is distributed among all the order line items that have prices associated with them. The amount distributed is either the value specified in the <code>AppliedDiscountAmount</code> field or the difference between the values in the calculated <code>TotalAmount</code> and the user-specified <code>TotalAmountOverride</code> fields. Valid values are:</p> <ul style="list-style-type: none"> • <code>Equal</code>—Distributes the discount amount equally among all the order items. • <code>Proportionate</code>—Distributes the discount amount in proportion to the <code>ListPriceTotal</code> values of the order items. <p>Available in API version 65.0 and later.</p>

Field	Details
AppliedDiscount	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The discount amount that's distributed among all the order items that have prices associated with them. This amount is distributed based on the logic specified in the <code>AdjustmentDistributionLogic</code> field. Available in API version 65.0 and later.</p>
AppliedDiscountAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The percent discount applied to each order item. Available in API version 65.0 and later.</p>
CalculationStatus	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description The status of the price and tax calculations for the order. Valid values are:</p> <ul style="list-style-type: none"> • <code>CompletedWithPricing</code>—Indicates that pricing is complete and tax will now be calculated. • <code>CompletedWithTax</code>—Indicates that pricing and tax calculation are complete. • <code>CompletedWithoutPricing</code>—Indicates that pricing and tax calculation were skipped. For a sales rep, this value appears as <code>Unknown</code> on the order page. • <code>ConfigurationFailed</code>—Indicates that configuration failed. Available in API version 62.0 • <code>ConfigurationInProgress</code>—Indicates that the configuration is in progress. Available in API version 62.0 • <code>GroupRampConfigurationFailed</code>—Indicates that the checks for group ramps have failed. Available in API version 65.0 and later. • <code>OrderRequestFailed</code>—Indicates that the requested order changes weren't saved. Available in API version 62.0 • <code>OrderRequestPartiallySaved</code>—Indicates that the requested order changes were partially saved. Available in API version 62.0 • <code>PriceCalculationFailed</code>—Indicates that pricing failed. • <code>ReconciliationFailed</code>—Indicates that the arrangement of order data failed. Available in API version 62.0

Field	Details
	<ul style="list-style-type: none"> • <code>ReconciliationInProgress</code>—Indicates that the arrangement of data is in progress. For a sales rep, this value appears as <code>Saving</code> on the order page. Available in API version 62.0 • <code>SaveFailedOrIncomplete</code>—Indicates that the recent changes to the order weren't saved. For a sales rep, this value appears as <code>Some Records Weren't Saved</code> on the order page. • <code>TaxCalculationFailed</code>—Indicates that pricing is complete but tax calculation failed. • <code>TaxCalculationWaiting</code>—Indicates that pricing is complete and a request is sent to the tax engine, but tax calculation isn't complete. <p>This read-only field is available in API version 61.0 and later.</p>
<code>DiscountPercent</code>	<p>Type percent</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The percentage of discount applied to the order. Available in API version 60.0 and later.</p>
<code>FulfillmentPlanId</code>	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The unique ID of the fulfillment plan associated with the order. This field is a relationship field. This field is available only in orgs where Dynamic Revenue Orchestrator is enabled. Available in API version 60.0 and later.</p> <p>Relationship Name FulfillmentPlan</p> <p>Relationship Type Lookup</p> <p>Refers To FulfillmentPlan</p>
<code>LastPricedDate</code>	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date when the order price was last calculated. Available in API version 60.0 and later.</p>

Field	Details
OrchestrationSbmsStatus	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description The status of order submission for orchestration. This field is available only in orgs where Dynamic Revenue Orchestrator is enabled. Valid values are:</p> <ul style="list-style-type: none"> • Completed • Rejected • Submitted <p>This read-only field is available in API version 61.0 and later.</p>
OriginalActionType	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description For internal use only. Available in API version 61.0 and later.</p>
SalesTransactionTypeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The foreign key to the Sales Transaction Type object. Available in API version 61.0 and later. This field is a relationship field.</p> <p>Relationship Name SalesTransactionType</p> <p>Relationship Type Lookup</p> <p>Refers To SalesTransactionType</p>
TotalAmountOverride	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p>

Field	Details
	<p>Description</p> <p>The value that the <code>TotalAmount</code> field must be set to by applying overall discounts.</p> <p>Transaction Management calculates the overall discount amount by finding the difference between the value in the calculated <code>TotalAmount</code> field and the value in this field. It then uses the logic specified in the <code>AdjustmentDistributionLogic</code> field to distribute the discount amount among all the order items that have prices associated with them.</p> <p>Available in API version 65.0 and later.</p>
<code>TotalRoundedLineAmount</code>	<p>Type</p> <p>currency</p> <p>Properties</p> <p>Filter, Nillable, Sort</p> <p>Description</p> <p>The total amount of all line items in an order without pricing adjustments, such as discounts or tax calculations. Available in API version 60.0 and later.</p>
<code>ValidationResult</code>	<p>Type</p> <p>picklist</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description</p> <p>Specifies whether the order was configured and priced.</p> <p>Orders can be activated only after they're configured and priced.</p> <p>Valid value is:</p> <ul style="list-style-type: none"> • <code>TransactionIncomplete</code>—Indicates that the order wasn't configured and priced. <p>Available in API version 61.0 and later.</p>

Transaction Management Fields on Order Item

Standard and custom fields extend the standard Order Item object for use in Transaction Management.

Fields

Field	Details
<code>CustomProductName</code>	<p>Type</p> <p>string</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The custom name of a product that's used to override the product name. Available in API version 61.0 and later.</p>
Discount	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The manual discount percentage for the order item. Available in API version 60.0 and later.</p>
DiscountAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The manual discount amount for the order item. Available in API version 60.0 and later.</p>
EffectiveGrantDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date on which the resources associated with the order item are granted.</p>
EndDateTime	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The end date and time of the order item, which is calculated by using the values in the <code>EndDate</code>, <code>EndTime</code>, and <code>ServiceEndTimeZone</code> fields. If the <code>EndTime</code> field doesn't have a value, 23:59:59 is used for the calculation. If the <code>ServiceEndTimeZone</code> field doesn't have a value, GMT is used for the calculation. Available in API version 65.0 and later.</p>
EndQuantity	<p>Type double</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	<p>Description The revised quantity of the item after adjusting changes. The field is read-only. It's calculated by adding the Start Quantity and the Quantity fields. Available in API version 60.0 and later.</p>
EndTime	<p>Type time</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The end time of the order item. Available in API version 65.0 and later.</p>
Margin	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The optional margin percentage, specified by the sales representative at the line item level. Available in API version 65.0 and later.</p>
MarginAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The optional margin amount, specified by the sales representative at the line item level. Available in API version 65.0 and later.</p>
NetTotalPrice	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The total price after applying all price adjustments. Available in API version 60.0 and later.</p>
OrderItemGroupId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The order item group associated with the order item. This field is a relationship field.</p>

Field	Details
	<p>Relationship Name OrderItemGroup</p> <p>Refers To OrderItemGroup</p>
PartnerDiscountPercent	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The discount percentage given to the partner for the order item. Available in API version 60.0 and later.</p>
PartnerUnitPrice	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The unit price after applying the discount given to the partner for the order item. Available in API version 60.0 and later.</p>
PriceWaterfallIdentifier	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The price waterfall identifier generated by Salesforce Pricing that's associated with the pricing of this order item record. Available in API version 60.0 and later.</p>
ServiceDateTime	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The start date and time of the order item, which is calculated by using the values in the <code>ServiceDate</code>, <code>ServiceTime</code>, and <code>ServiceEndTimeZone</code> fields. If the <code>ServiceTime</code> field doesn't have a value, 00:00:00 is used for the calculation. If the <code>ServiceEndTimeZone</code> field doesn't have a value, GMT is used for the calculation. Available in API version 65.0 and later.</p>
ServiceEndTimeZone	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The time zone for the order item's start and end dates, times, and datetimes. Available in API version 65.0 and later.</p>
ServiceTime	<p>Type time</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The start time of the order item. Available in API version 65.0 and later.</p>
StartQuantity	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The quantity available on the order item start date. Available in API version 60.0 and later.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The status of the order item. Available in API version 60.0 and later.</p>
SubscriptionTerm	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The number of terms in the subscription for the item. The unit of the subscription term is stored in the PricingTermUnit field of this order item's related product selling model record (OrderItem.ProductSellingModel.PricingTermUnit). Available in API version 61.0 and later.</p>
TotalAdjustment	<p>Type percent</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	<p>Description</p> <p>The total discount percentage applied at the line item level. This percentage is calculated by using the formula: $(\text{Total Line Amount} - \text{Net Total Price}) / \text{Total Line Amount}$. Available in API version 65.0 and later.</p>
TotalCost	<p>Type</p> <p>currency</p> <p>Properties</p> <p>Filter, Nillable, Sort</p> <p>Description</p> <p>The total cost of all products sold in the order, calculated by multiplying the quantity by the unit cost. Available in API version 65.0 and later.</p>
TotalMargin	<p>Type</p> <p>percent</p> <p>Properties</p> <p>Filter, Nillable, Sort</p> <p>Description</p> <p>The effective margin percentage at the line item level. This percentage is calculated by using the formula: $(\text{Net Total Price} - \text{Total Cost}) / \text{Net Total Price}$. Available in API version 65.0 and later.</p>
TotalMarginAmount	<p>Type</p> <p>currency</p> <p>Properties</p> <p>Filter, Nillable, Sort</p> <p>Description</p> <p>The effective margin amount at the line item level. This amount is calculated by subtracting total cost from net total price. Available in API version 65.0 and later.</p>
UnitCost	<p>Type</p> <p>currency</p> <p>Properties</p> <p>Create, Filter, Nillable, Sort, Update</p> <p>Description</p> <p>The unit cost of a product being sold as part of the order. Available in API version 65.0 and later.</p>
ValidationResult	<p>Type</p> <p>picklist</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p>

Field	Details
	<p>Description</p> <p>Specifies whether the order item was configured and priced.</p> <p>An order can be activated only after all its order items are configured and priced.</p> <p>Valid value is:</p> <ul style="list-style-type: none"> • <code>warning</code>—Indicates that the order item isn't configured and priced. <p>Available in API version 60.0 and later.</p>

Transaction Management Fields on Order Item Group

Standard and custom fields extend the standard Order Item Group object for use in Transaction Management.

Fields

Field	Details
Discount	<p>Type</p> <p>percent</p> <p>Properties</p> <p>Create, Filter, Nillable, Sort, Update</p> <p>Description</p> <p>The optional discount percentage, specified by the sales representative at the group level.</p> <p>Available in API version 65.0 and later.</p>
DiscountAmount	<p>Type</p> <p>currency</p> <p>Properties</p> <p>Create, Filter, Nillable, Sort, Update</p> <p>Description</p> <p>The optional discount amount, specified by the sales representative at the group level.</p> <p>Available in API version 65.0 and later.</p>
EndDate	<p>Type</p> <p>date</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p>Description</p> <p>The end date of the group.</p> <p>If the <code>IsRamped</code> field is set to <code>true</code>, Transaction Management sets this date as the end date of all the line items in the group that have the Term-Defined product selling model.</p> <p>Available in API version 65.0 and later.</p>

Field	Details
IsRamped	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the group is a group ramp segment, which is a period in a group ramp schedule with specific products, quantities, and discounts. You can use this field from Revenue Cloud only when the Ramp Deals for Groups in Quotes and Orders setting is turned on. The default value is <code>false</code>. Available in API version 65.0 and later.</p>
Margin	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The optional margin percentage, specified by the sales representative at the group level. Available in API version 65.0 and later.</p>
MarginAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The optional margin amount, specified by the sales representative at the group level. This amount can also be considered as the summary margin amount calculated by subtracting the total cost from the summary subtotal. Available in API version 65.0 and later.</p>
ParentOrderItemGroupId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the parent group for a nested quote line group. Available in API version 65.0 and later. This field is a relationship field.</p> <p>Relationship Name ParentOrderItemGroup</p> <p>Refers To OrderItemGroup</p>

Field	Details
SegmentType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The duration type of the segment. You can use this field from Revenue Cloud only when the Ramp Deals for Groups in Quotes and Orders setting is turned on.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • Custom • Yearly <p>Available in API version 65.0 and later.</p>
StartDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The start date of the group.</p> <p>If the <code>IsRamped</code> field is set to <code>true</code>, Transaction Management sets this date as the start date of all the line items in the group.</p> <p>Available in API version 65.0 and later.</p>
SummaryTotalAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The aggregated total amount of nested group lines before any discounts are applied. Available in API version 65.0 and later.</p>
TotalAdjustment	<p>Type percent</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The total discount percentage applied at the group level. This percentage is calculated by using the formula: $(\text{Summary Total Amount} - \text{Summary Subtotal}) / \text{Summary Total Amount}$. Available in API version 65.0 and later.</p>
TotalAdjustmentAmount	<p>Type currency</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The total discount amount at the group level. This amount is calculated by subtracting the summary subtotal from the summary total amount. Available in API version 65.0 and later.</p>
TotalCost	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The aggregated total cost of nested group lines. Available in API version 65.0 and later.</p>
TotalMargin	<p>Type percent</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The summary margin percentage at the line item level. This percentage is calculated by using the formula: (Summary Subtotal - Total Cost) / Summary Subtotal. Available in API version 65.0 and later.</p>
TotalMarginAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The summary margin amount calculated at the group level. Available in API version 65.0 and later.</p>

Transaction Management Fields on Order Action

Standard and custom fields extend the standard Order Action object for use in Transaction Management. This object is available in API version 55.0 and later.

Fields

Field	Details
Type	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The business action that created the order product.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • Add • Amend • Cancel • No Change—A child product was added to the bundle, but the top-level product in the bundle was otherwise unchanged. • Renew

Transaction Management Fields on Order Item Relationship

Standard and custom fields extend the standard Order Item Relationship object for use in Transaction Management. This object is available in API version 58.0 and later.

Fields

Field	Details
ProductRelatedComponentId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort</p> <p>Description The ID of the product that is included in a product bundle, a set, or a product and an add-on. This field is a relationship field.</p> <p>Relationship Name ProductRelatedComponent</p> <p>Relationship Type Lookup</p> <p>Refers To ProductRelatedComponent</p>

Transaction Management Fields on Quote

Standard and custom fields extend the standard Quote object for use in Transaction Management to represent information about quotes. This object is available in API version 60.0 and later.

Fields

Field	Details
AdjustmentDistributionLogic	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies how the overall discount amount is distributed among all the quote line items that have prices associated with them.</p> <p>The amount distributed is either the value specified in the <code>AppliedDiscountAmount</code> field or the difference between the values in the calculated <code>TotalPrice</code> and the user-specified <code>TotalPriceOverride</code> fields.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • <code>Equal</code>—Distributes the discount amount equally among all the quote line items. • <code>Proportionate</code>—Distributes the discount amount in proportion to the <code>ListPriceTotal</code> values of the quote line items. <p>Available in API version 65.0 and later.</p>
AppliedDiscount	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The percent discount applied to each quote line item. Available in API version 65.0 and later.</p>
AppliedDiscountAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The discount amount that's distributed among all the quote line items that have prices associated with them. This amount is distributed based on the logic specified in the <code>AdjustmentDistributionLogic</code> field. Available in API version 65.0 and later.</p>
LastPricedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date when the quote is last priced.</p>

Field	Details
PartnerAccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description ID of the related partner account. This field is a relationship field.</p> <p>Relationship Name PartnerAccount</p> <p>Relationship Type Lookup</p> <p>Refers To Account</p>
TotalPriceOverride	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The value that the <code>TotalPrice</code> field must be set to by applying overall discounts. Transaction Management calculates the overall discount amount by finding the difference between the value in the calculated <code>TotalPrice</code> field and the value in this field. It then uses the logic specified in the <code>AdjustmentDistributionLogic</code> field to distribute the discount amount among all the quote line items that have prices associated with them. Available in API version 65.0 and later.</p>
ValidationResult	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies whether the quote was configured and priced. Quotes can be activated only after they're configured and priced. Valid values are:</p> <ul style="list-style-type: none"> • <code>TransactionIncomplete</code>—Specifies that the quote wasn't configured and priced. <p>Available in API version 61.0 and later.</p>

Transaction Management Fields on Quote Line Group

Standard and custom fields extend the standard Quote Line Group object for use in Transaction Management.

Fields

Field	Details
Discount	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The optional discount percentage, specified by the sales representative at the group level. Available in API version 65.0 and later.</p>
DiscountAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The optional discount amount, specified by the sales representative at the group level. Available in API version 65.0 and later.</p>
EndDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The end date of the group. If the <code>IsRamped</code> field is set to <code>true</code>, Transaction Management sets this date as the end date of all the line items in the group that have the Term-Defined product selling model. Available in API version 65.0 and later.</p>
IsRamped	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the group is a group ramp segment, which is a period in a group ramp schedule with specific products, quantities, and discounts. You can use this field from Revenue Cloud only when the Ramp Deals for Groups in Quotes and Orders setting is turned on. The default value is <code>false</code>. Available in API version 65.0 and later.</p>

Field	Details
Margin	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The optional margin percentage, specified by the sales representative at the group level. Available in API version 65.0 and later.</p>
MarginAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The optional margin amount, specified by the sales representative at the group level. This amount can also be considered as the summary margin amount calculated by subtracting the total cost from the summary subtotal. Available in API version 65.0 and later.</p>
ParentQuoteLineGroupId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the parent group for a nested quote line group. Available in API version 65.0 and later. This field is a relationship field.</p> <p>Relationship Name ParentQuoteLineGroup</p> <p>Refers To QuoteLineGroup</p>
SegmentType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The duration type of the segment. You can use this field from Revenue Cloud only when the Ramp Deals for Groups in Quotes and Orders setting is turned on. Valid values are:</p> <ul style="list-style-type: none"> • Custom • Yearly <p>Available in API version 65.0 and later.</p>

Field	Details
StartDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The start date of the group. If the <code>IsRamped</code> field is set to <code>true</code>, Transaction Management sets this date as the start date of all the line items in the group. Available in API version 65.0 and later.</p>
SummaryTotalAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The aggregated total amount of nested group lines before any discounts are applied. Available in API version 65.0 and later.</p>
TotalAdjustment	<p>Type percent</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The total discount percentage applied at the group level. This percentage is calculated by using the formula: $(\text{Summary Total Amount} - \text{Summary Subtotal}) / \text{Summary Total Amount}$. Available in API version 65.0 and later.</p>
TotalAdjustmentAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The total discount amount at the group level. This amount is calculated by subtracting the summary subtotal from the summary total amount. Available in API version 65.0 and later.</p>
TotalCost	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The aggregated total cost of nested group lines. Available in API version 65.0 and later.</p>

Field	Details
TotalMargin	<p>Type percent</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The summary margin percentage at the line item level. This percentage is calculated by using the formula: (Summary Subtotal - Total Cost) / Summary Subtotal. Available in API version 65.0 and later.</p>
TotalMarginAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The summary margin amount calculated at the group level. Available in API version 65.0 and later.</p>

Transaction Management Fields on Quote Line Item

Standard and custom fields extend the standard Quote Line Item object for use in Transaction Management to represent information about line items in a quote. This object is available in API version 60.0 and later.

Fields

Field	Details
DiscountAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Specifies the fixed amount discount to apply to the quote line item.</p>
EffectiveGrantDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date on which the resources associated with the quote line item are granted.</p>

Field	Details
EndDateTime	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The end date and time of the quote line item, which is calculated by using the values in the EndDate, EndTime, and StartEndTimeZone fields. If the EndTime field doesn't have a value, 23:59:59 is used for the calculation. If the StartEndTimeZone field doesn't have a value, GMT is used for the calculation. Available in API version 65.0 and later.</p>
EndQuantity	<p>Type double</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The quantity available on the quote line item end date. The field is read-only. It is calculated by adding the Start Quantity and the existing Quantity fields.</p>
EndTime	<p>Type time</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The end time of the quote line item. Available in API version 65.0 and later.</p>
Margin	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The optional margin percentage, specified by the sales representative at the line item level. Available in API version 65.0 and later.</p>
MarginAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The optional margin amount, specified by the sales representative at the line item level. Available in API version 65.0 and later.</p>

Field	Details
PartnerDiscountPercent	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The discount percentage given to the partner for the quote line.</p>
PartnerUnitPrice	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The unit price after discount given to the partner for the quote line.</p>
PriceWaterfallIdentifier	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The price waterfall identifier generated by Salesforce Pricing that's associated with the pricing of the detail record.</p>
StartDateTime	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The start date and time of the quote line item, which is calculated by using the values in the <code>StartDate</code>, <code>StartTime</code>, and <code>StartEndTimeZone</code> fields. If the <code>StartTime</code> field doesn't have a value, 00:00:00 is used for the calculation. If the <code>StartEndTimeZone</code> field doesn't have a value, GMT is used for the calculation. Available in API version 65.0 and later.</p>
StartEndTimeZone	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The time zone for the quote line item's start and end dates, times, and datetimes. Available in API version 65.0 and later.</p>

Field	Details
StartTime	<p>Type time</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The start time of the quote line item. Available in API version 65.0 and later.</p>
StartQuantity	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort</p> <p>Description The quantity available on the quote line item start date.</p>
TotalAdjustment	<p>Type percent</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The total discount percentage applied at the line item level. This percentage is calculated by using the formula: $(\text{Total Line Amount} - \text{Net Total Price}) / \text{Total Line Amount}$. Available in API version 65.0 and later.</p>
TotalCost	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The total cost of all products sold in the order, calculated by multiplying the quantity by the unit cost. Available in API version 65.0 and later.</p>
TotalMargin	<p>Type percent</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The effective margin percentage at the line item level. This percentage is calculated by using the formula: $(\text{Net Total Price} - \text{Total Cost}) / \text{Net Total Price}$. Available in API version 65.0 and later.</p>
TotalMarginAmount	<p>Type currency</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The effective margin amount at the line item level. This amount is calculated by subtracting total cost from net total price. Available in API version 65.0 and later.</p>
UnitCost	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The unit cost of a product being sold as part of the order. Available in API version 65.0 and later.</p>
ValidationResult	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies whether the quote line item is configured and priced. A quote can be activated only after all its quote line items are configured and priced. Valid value is:</p> <ul style="list-style-type: none"> • <code>Warning</code>—Indicates that the quote line item isn't configured and priced. <p>Available in API version 60.0 and later.</p>

Transaction Management Fields on Quote Document

Standard and custom fields extend the standard Quote Document object for use in Transaction Management to represent information about quote documents. This object is available in API version 61.0 and later.

Fields

Field	Details
Document Template	<p>Type String</p> <p>Properties Create, Filter, Group, Nillable, Sort</p> <p>Description The template ID used for generating the quote document.</p>

Field	Details
Status	<p>Type Picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The status of the quote document. Possible values are:</p> <ul style="list-style-type: none"> • Completed • Failed • Generating • In Progress • None • Queued <p>The default value is None.</p>

Transaction Management 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.

[TransactionProcessingType](#)

Represents the settings to configure the processing constraints for a request.. This object is available in API version 63.0 and later.

TransactionProcessingType

Represents the settings to configure the processing constraints for a request.. This object is available in API version 63.0 and later.

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

Refer to the Usage section to learn more about creating Transaction Processing Type records based on your requirements. See the [setup details](#) to specify the default rule engine on the Revenue Settings page.

Supported SOAP API Calls

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

Supported REST API Methods

GET, HEAD, POST, Query

Fields

Field	Details
Description	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The description of the transaction processing configuration to help Salesforce admins with configuration in their orgs.</p>
DeveloperName	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. The unique name of the object in the API. This name can contain only underscores and alphanumeric characters, and must be unique in your 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.</p>
Language	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Nillable, Update</p> <p>Description The language of the TransactionProcessingType object. Valid values are:</p> <ul style="list-style-type: none"> • da—Danish • de—German • en_US—English • es—Spanish • es_MX—Spanish (Mexico) • fi—Finnish • fr—French • it—Italian • ja—Japanese • ko—Korean • nl_NL—Dutch • no—Norwegian

Field	Details
	<ul style="list-style-type: none"> • pt_BR—Portuguese (Brazil) • ru—Russian • sv—Swedish • th—Thai • zh_CN—Chinese (Simplified) • zh_TW—Chinese (Traditional)
MasterLabel	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The label for the TransactionProcessingType object.</p>
PricingPreference	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies whether to execute the price calculation step for each sales transaction record. Valid values are:</p> <ul style="list-style-type: none"> • Force—Reprices all lines. • System—Performs a delta pricing request on the unprocessed lines when Delta Pricing is enabled in the org. • Skip—Skips the pricing request on all lines. <p>Available in API version 65.0 and later.</p>
RuleEngine	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description The rule engine to be used for processing rules.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • AdvancedConfigurator • StandardConfigurator
SaveType	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies how the transaction results are processed when saved for Salesforce administrators to adjust the user experience as desired. Valid values are:</p> <ul style="list-style-type: none"> • Standard • Large—Reserved for future use.
TaxPreference	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies whether to execute or skip the tax calculation step for each sales transaction record. Valid value is <code>Skip</code>. If this value isn't specified, then tax calculation request is performed by default. Available in API version 65.0 and later.</p>

Usage

Create transaction type records by calling this resource through a POST method.

```
/services/data/v65.0/tooling/subjects/TransactionProcessingType
```

Here's a sample payload that specifies the rule engine to use and steps to skip for each sales transaction record.

```
{
  "SaveType": "Standard",
  "Description": "Setup for Transaction Processing Type",
  "DeveloperName": "SkipPricingAndTaxStep",
  "MasterLabel": "SkipPricingAndTaxStep",
  "RuleEngine": "StandardConfigurator",
  "PricingPreference": "Skip",
  "TaxPreference": "Skip"
}
```

Transaction Management Platform Event

Use the QuoteSaveEvent event to notify subscribers after saving of a quote is processed.

CreateAssetOrderEvent

Notifies subscribers that the process started by the `/actions/standard/createOrUpdateAssetFromOrder` or `/actions/standard/createOrUpdateAssetFromOrderItem` request is complete. If the process is successful, use this event to learn about the new assets. If the request isn't successful, use this event to learn about the errors and how to fix them. This object is available in API version 55.0 and later.

PlaceOrderCompletedEvent

Notifies subscribers of an order being created or updated by invoking the Place Order API or the Place Sales Transaction API. This object is available in API version 63.0 and later.

QuoteSaveEvent

Notifies subscribers that the process started by the Place Quote or Place Sales Transaction API request is complete. If the process is successful, use this event to learn about the updated quote. If the request isn't successful, use this event to learn about the errors and how to fix them. This object is available in API version 60.0 and later.

QuoteToOrderCompletedEvent

Notifies subscribers when the `/actions/standard/createOrderFromQuote` REST request is complete. If the request is successful, use this event to learn about the Order record. If the request isn't successful, use this event to learn about the errors associated with the request. This object is available in API version 56.0 and later.

EDITIONS

Available in: Lightning Experience

Available in all Salesforce orgs where the admin settings for products related to the use case are enabled. The Salesforce org must have a Revenue Cloud or Subscription Management license.

CreateAssetOrderEvent

Notifies subscribers that the process started by the `/actions/standard/createOrUpdateAssetFromOrder` or `/actions/standard/createOrUpdateAssetFromOrderItem` request is complete. If the process is successful, use this event to learn about the new assets. If the request isn't successful, use this event to learn about the errors and how to fix them. This object is available in API version 55.0 and later.

Supported Calls

`describeSObjects()`

Supported Subscribers

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

Subscription Channel

/event/CreateAssetOrderEvent

Event Delivery Allocation Enforced

No


Special Access Rules

This object is available if Subscription Management or Revenue Cloud is enabled in your org. Users must have Read access on this event to receive or view event notifications.

Fields

Field	Details
AssetDetails	<p>Type CreateAssetOrderDtlEvent on page 906</p> <p>Properties Nillable</p> <p>Description A list of AssetDetail records created as a result of a successful request. Each AssetDetail contains an order item ID, asset ID, and IsSuccess flag. If the request failed, the AssetDetail also contains an error code and error message.</p>
CorrelationIdentifier	<p>Type string</p> <p>Properties Nillable</p> <p>Description Reserved for future use.</p>
EventUuid	<p>Type string</p> <p>Properties Nillable</p> <p>Description A universally unique identifier (UUID) that identifies a platform event message.</p>
IsLastEvent	<p>Type boolean</p> <p>Properties Defaulted on create</p>

Field	Details
	<p>Description</p> <p>Indicates whether this event is the final event in the request (<code>true</code>) or not (<code>false</code>). If <code>true</code>, then there are no more events associated with the request. This field is populated only in the final event in the request.</p> <p>The default value is <code>false</code>.</p> <p>This field is available in API version 62.0 and later.</p>
<code>OrderIdentifier</code>	<p>Type</p> <p>string</p> <p>Properties</p> <p>Nullable</p> <p>Description</p> <p>The ID of the order associated with this event. Available with Revenue Cloud in API version 64.0 and later.</p>
<code>ReplayId</code>	<p>Type</p> <p>string</p> <p>Properties</p> <p>Nullable</p> <p>Description</p> <p>Represents an ID value that is populated by the system and refers to the position of the event in the event stream. Replay ID values aren't guaranteed to be contiguous for consecutive events. A subscriber can store a replay ID value and use it on resubscription to retrieve missed events that are within the retention window.</p>
<code>RequestId</code>	<p>Type</p> <p>string</p> <p>Properties</p> <p>Nullable</p> <p>Description</p> <p>Id of the request that triggered the event.</p>

 **Example:** A user successfully runs a `createOrUpdateAssetFromOrder` request on an order with two order items. The published `createAssetOrderEvent` contains this information.

- RequestId: 0001
- AssetDetail
 - OrderItemId: 802XX0000000001
 - AssetId: 02iXX0000000001
 - IsSuccess: True
- AssetDetail

- OrderItemId: 802XX0000000001
- AssetId: 02iXX0000000002
- IsSuccess: True



Example: A user runs a `createOrUpdateAssetFromOrder` request on an order with two order items, but doesn't have Create access on assets. The request fails, and the published `createAssetOrderEvent` contains this information.

- RequestId: 0002
- AssetDetail
 - OrderItemId: 802XX0000000001
 - IsSuccess: False
 - ErrorCode: `INSUFFICIENT_ACCESS`
 - ErrorMessage: User doesn't have Create Access to asset.
- AssetDetail
 - OrderItemId: 802XX0000000001
 - IsSuccess: False
 - ErrorCode: `INSUFFICIENT_ACCESS`
 - ErrorMessage: User doesn't have Create Access to asset.

CreateAssetOrderDtlEvent

Contains information about an attempt to create or update an asset as a result of `/actions/standard/createOrUpdateAssetFromOrder`. If the request was successful, the event shows information about the asset. If the request failed, the event shows error information. This object is included in an `CreateAssetOrderEvent` message. You can't subscribe to `CreateAssetOrderDtlEvent` directly. This object is available in API version 55.0 and later.

CreateAssetOrderDtlEvent

Contains information about an attempt to create or update an asset as a result of `/actions/standard/createOrUpdateAssetFromOrder`. If the request was successful, the event shows information about the asset. If the request failed, the event shows error information. This object is included in an `CreateAssetOrderEvent` message. You can't subscribe to `CreateAssetOrderDtlEvent` directly. This object is available in API version 55.0 and later.

Supported Calls

`describeSObjects()`

Supported Subscribers

Subscriber	Supported?
Apex Triggers	✓
Flows	✓
Processes	✓

Subscriber	Supported?
Pub/Sub API	✓
Streaming API (CometD)	✓

Subscription Channel

/event/CreateAssetOrderDt1Event

Special Access Rules

This object is available if Subscription Management is installed in your org. Users must have Read access on this event to receive or view event notifications.

Fields

Field	Details
AssetId	<p>Type reference</p> <p>Properties Nillable</p> <p>Description The ID of the asset that was created or updated. This field is a relationship field.</p> <p>Relationship Name Asset</p> <p>Relationship Type Lookup</p> <p>Refers To Asset</p>
ErrorCode	<p>Type string</p> <p>Properties Nillable</p> <p>Description Reference code for the type of error that occurred.</p>
ErrorMessage	<p>Type string</p> <p>Properties Nillable</p>

Field	Details
	<p>Description Information about the error that occurred after the request was made.</p>
EventUuid	<p>Type string</p> <p>Properties Nillable</p> <p>Description A universally unique identifier (UUID) that identifies a platform event message.</p>
IsSuccess	<p>Type boolean</p> <p>Properties Defaulted on create</p> <p>Description Indicates whether the request to create the asset for the order item was successful (true) or not (false). The default value is <code>false</code>. Available in API version 61.0 and later.</p>
OrderItemId	<p>Type reference</p> <p>Properties</p> <p>Description The ID of the order item used in the request. Available in API version 61.0 and later. This field is a relationship field.</p> <p>Relationship Name OrderItem</p> <p>Relationship Type Lookup</p> <p>Refers To OrderItem</p>
ReplayId	<p>Type string</p> <p>Properties Nillable</p> <p>Description Represents an ID value that is populated by the system and refers to the position of the event in the event stream. Replay ID values aren't guaranteed to be contiguous for consecutive events. A subscriber can store a replay ID value and use it on resubscription to retrieve missed events that are within the retention window.</p>

PlaceOrderCompletedEvent

Notifies subscribers of an order being created or updated by invoking the Place Order API or the Place Sales Transaction API. This object is available in API version 63.0 and later.

Supported Calls

`describeSObjects()`

Supported Subscribers

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

Subscription Channel

`/event/PlaceOrderCompletedEvent`

Event Delivery Allocation Enforced

Yes

Fields

Field	Details
<code>AppUsageTypes</code>	<p>Type string</p> <p>Properties Nillable</p> <p>Description Tag that represents the application that's using the order and determines how an order is processed. For example, the <code>AppUsageTypes</code> field value for Revenue Cloud orders is <code>RevenueLifecycleManagement</code>.</p>
<code>CorrelationIdentifier</code>	<p>Type string</p>

Field	Details
	<p>Properties Nillable</p> <p>Description Reserved for future use.</p>
EventUuid	<p>Type string</p> <p>Properties Nillable</p> <p>Description A universally unique identifier (UUID) that identifies a platform event message.</p>
HasErrors	<p>Type boolean</p> <p>Properties Defaulted on create</p> <p>Description Indicates whether errors occurred when creating or updating the order (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
OrderId	<p>Type reference</p> <p>Properties Nillable</p> <p>Description ID of the order record. This field is a relationship field.</p> <p>Relationship Name Order</p> <p>Refers To Order</p>
ReplayId	<p>Type string</p> <p>Properties Nillable</p> <p>Description Represents an ID value that is populated by the system and refers to the position of the event in the event stream. Replay ID values aren't guaranteed to be contiguous for consecutive</p>

Field	Details
	events. A subscriber can store a replay ID value and use it on resubscription to retrieve missed events that are within the retention window.
<code>RequestIdentifier</code>	<p>Type string</p> <p>Properties Nillable</p> <p>Description ID of the request that triggered the event.</p>

QuoteSaveEvent

Notifies subscribers that the process started by the Place Quote or Place Sales Transaction API request is complete. If the process is successful, use this event to learn about the updated quote. If the request isn't successful, use this event to learn about the errors and how to fix them. This object is available in API version 60.0 and later.

Supported Calls

`describeSObjects()`

Supported Subscribers

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

Streaming API Subscription Channel

`/event/QuoteSaveEvent`

Special Access Rules

This object is available in orgs with Subscription Management or Revenue Cloud.

Fields

Field	Details
CorrelationIdentifier	<p>Type string</p> <p>Properties Nillable</p> <p>Description Reserved for future use.</p>
EventUuid	<p>Type string</p> <p>Properties Nillable</p> <p>Description A universally unique identifier (UUID) that identifies a platform event message.</p>
HasErrors	<p>Type boolean</p> <p>Properties Defaulted on create</p> <p>Description The default value is false. Possible values are:</p> <ul style="list-style-type: none">• false• true
QuoteId	<p>Type reference</p> <p>Properties Nillable</p> <p>Description The ID of the quote associated with this event. This field is a relationship field.</p>
ReplayId	<p>Type string</p> <p>Properties Nillable</p> <p>Description Represents an ID value that is populated by the system and refers to the position of the event in the event stream. Replay ID values aren't guaranteed to be contiguous for consecutive</p>

Field	Details
	events. A subscriber can store a replay ID value and use it on resubscription to retrieve missed events that are within the retention window.
<code>RequestIdentifier</code>	<p>Type string</p> <p>Properties Nillable</p> <p>Description ID of the request that triggered the event.</p>

QuoteToOrderCompletedEvent

Notifies subscribers when the `/actions/standard/createOrderFromQuote` REST request is complete. If the request is successful, use this event to learn about the Order record. If the request isn't successful, use this event to learn about the errors associated with the request. This object is available in API version 56.0 and later.

Supported Calls

`describeSObjects()`

Supported Subscribers

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

Subscription Channel

`/event/QuoteToOrderCompletedEvent`

Event Delivery Allocation Enforced

No

Special Access Rules

This object is available with Subscription Management.

Field	Details
CorrelationIdentifier	<p>Type string</p> <p>Properties Nillable</p> <p>Description Reserved for future use.</p>
EventUuid	<p>Type string</p> <p>Properties Nillable</p> <p>Description A universally unique identifier (UUID) that identifies a platform event message.</p>
HasErrors	<p>Type boolean</p> <p>Properties Defaulted on create</p> <p>Description Contains <code>true</code> if errors occurred during the process; otherwise <code>false</code>. The default value is <code>false</code>.</p>
OrderId	<p>Type string</p> <p>Properties Nillable</p> <p>Description The ID of the order created from the quote. If the process failed, this field is null.</p>
OrderNumber	<p>Type string</p> <p>Properties Nillable</p> <p>Description The user-friendly, unique number assigned to the order created from the quote.</p>
QuoteToOrderErrorDetailEvents	<p>Type QuoteToOrderErrDtlEvent[]</p> <p>Properties Nillable</p>

Field	Details
	<p>Description</p> <p>Contains a list of error messages and error codes if the request failed.</p>
ReplayId	<p>Type</p> <p>string</p> <p>Properties</p> <p>Nullable</p> <p>Description</p> <p>Represents an ID value that is populated by the system and refers to the position of the event in the event stream. Replay ID values aren't guaranteed to be contiguous for consecutive events. A subscriber can store a replay ID value and use it on resubscription to retrieve missed events that are within the retention window.</p>
RequestIdentifier	<p>Type</p> <p>string</p> <p>Properties</p> <p>Nullable</p> <p>Description</p> <p>The unique ID returned in the <code>actions/standard/createOrderFromQuote</code> response. Use this ID to identify the event for a specific request.</p>

Transaction Management Business APIs

Use the Transaction Management Business APIs to fetch instant pricing data on a quote or an order, to create a quote, or to create an order.

This table lists the available Transaction Management resources.

Resource	Description
/connect/revenue-management/assets/actions/amend (POST)	Initiate and execute the amendment of a quote or an order.
/connect/revenue-management/assets/actions/cancel (POST)	Initiate and execute the cancellation of an asset.
/connect/revenue-management/assets/actions/renew (POST)	Initiate and execute the renewal of an asset.
/industries/cpq/quotes/actions/get-instant-price (POST)	Fetch instant pricing data on the quote or order line data grid and associated summary component. It offers capabilities to either create a context or

Resource	Description
/commerce/sales-orders/actions/place (POST)	update the existing one based on the provided context ID.
/commerce/quotes/actions/place (POST)	Place orders with integrated pricing, configuration, and validation, and manage them throughout their entire lifecycle. Additionally, update an order or insert order items.
/connect/revenue-management/sales-transaction-contexts/<i>resourceId</i>/actions/ramp-deal-create (POST)	Create a quote to discover and price products and services. Additionally, insert, update, or delete a quote line item.
/connect/revenue-management/sales-transaction-contexts/<i>resourceId</i>/actions/ramp-deal-update (POST)	Create a ramp deal for a customer on a product. Sales reps can use ramp deals to provide yearly deals to a customer, resulting in long-term revenue and customer relationship. A customer can create, update, or view multiple segments of periods for their subscription term with different attributes for each segment.
/connect/revenue-management/sales-transaction-contexts/<i>resourceId</i>/actions/ramp-deal-view (GET)	Modify a ramp deal in scenarios where a segment has updates such as quantity, discount, or date change.
/connect/revenue-management/sales-transaction-contexts/<i>resourceId</i>/actions/ramp-deal-delete (POST)	View a ramp deal related to a quote line item or an order item.
/connect/rev/sales-transaction/actions/place (POST)	Delete a ramp deal to convert a ramped product to include a single quote line item or order item.
/connect/rev/sales-transaction/actions/clone (POST)	Create a sales transaction, such as an order or a quote, with integrated pricing and configuration. Additionally, update an order or a quote, and insert and delete order or quote line items to calculate the estimated tax.
/connect/rev/sales-transaction/actions/clone (POST)	Create a clone of a quote line item or an order item record

Resource	Description
	with its related records and configurations. You can also clone all items in a quote line group or order item group when the record to clone is a quote line group or an order item group record.
/connect/rev/sales-transaction/actions/place-supplemental-transaction (POST)	Create a supplemental order or change orders after they are submitted for processing, such as during the fulfillment process.
/connect/revenue/transaction-management/sales-transactions/actions/read (POST)	Retrieve sales transaction data efficiently from an initialized or a hydrated context.
/connect/advanced-approvals/approval-submission/preview (POST)	Preview the approval levels of a record and associated level details, approval chains, approvers, and conditions before you submit the record for an approval.

Resources

Learn more about the available Quote and Order Capture resources.

Request Bodies

Learn more about the available API request bodies.

Response Bodies

Learn more about the available response bodies.

SEE ALSO:

[Connect REST API Developer Guide: Introduction](#)

Resources

Learn more about the available Quote and Order Capture resources.

Asset Amendment (POST)

Initiate and execute the amendment of a quote or an order.

Asset Cancellation (POST)

Initiate and execute the cancellation of an asset.

[Asset Renewal \(POST\)](#)

Initiate and execute the renewal of an asset.

[Clone Sales Transaction \(POST\)](#)

Create a clone of a quote line item or an order item record with its related records and configurations. You can also clone all items in a quote line group or order item group when the record to clone is a quote line group or an order item group record.

[Instant Pricing \(POST\)](#)

Fetch instant pricing data on the quote or order line data grid and associated summary component. It offers capabilities to either create a context or update the existing one based on the provided context ID.

[Place Order \(POST\)](#)

Place orders with integrated pricing, configuration, and validation, and manage them throughout their entire lifecycle. Additionally, update an order or insert order items.

[Place Quote \(POST\)](#)

Create a quote to discover and price products and services. Additionally, insert, update, or delete a quote line item.

[Place Sales Transaction \(POST\)](#)

Create a sales transaction, such as an order or a quote, with integrated pricing and configuration. Additionally, update an order or a quote, and insert and delete order or quote line items to calculate the estimated tax.

[Place Supplemental Transaction \(POST\)](#)

Create a supplemental order or change orders after they are submitted for processing, such as during the fulfillment process.

[Preview Approval \(POST\)](#)

Preview the approval levels of a record and associated level details, approval chains, approvers, and conditions before you submit the record for an approval.

[Read Sales Transaction \(POST\)](#)

Retrieve sales transaction data efficiently from an initialized or a hydrated context.

[Create Ramp Deal \(POST\)](#)

Create a ramp deal for a customer on a product. Sales reps can use ramp deals to provide yearly deals to a customer, resulting in long-term revenue and customer relationship. A customer can create, update, or view multiple segments of periods for their subscription term with different attributes for each segment.

[Delete Ramp Deal \(POST\)](#)

Delete a ramp deal to convert a ramped product to include a single quote line item or order item.

[Update Ramp Deal \(POST\)](#)

Modify a ramp deal in scenarios where a segment has updates such as quantity, discount, or date change.

[View Ramp Deal \(GET\)](#)

View a ramp deal related to a quote line item or an order item.

Asset Amendment (POST)

Initiate and execute the amendment of a quote or an order.

Special Access Rules

To use this API, you need the InitiateAmend API permission set.

Resource

```
/connect/revenue-management/assets/actions/amend
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/revenue-management/assets/actions/amend
```

Available version

62.0

HTTP methods

POST

Request body for POST**JSON example**

```
{
  "assetIds": [
    "02iSG0000003NMhYAM",
    "02iSG0000006DvSYAU"
  ],
  "amendmentStartDate": "2023-10-04T00:00:00",
  "contractId": "800SG00000CFpepYAD",
  "opportunityId": "006SG000004W5tVYAS",
  "outputRecordId": "801SG00000DX1jWYAT",
  "outputRecordType": "Quote",
  "quantityChange": 5
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
assetIds	String[]	IDs of the assets that you want to add to the amendment record.	Required	62.0
amendmentStartDate	String	Start date of the amendment.	Required	62.0
contractId	String	ID of the Contract record that you want to sync with the amendment quote.	Optional	62.0
opportunityId	String	ID of the Opportunity record that you want to sync with the amendment quote.	Optional	62.0
outputRecordId	String	ID of the quote or order record that you want to add the assets to.	Optional	62.0
outputRecordType	String	Type of amendment record that you want to create.	Required	62.0
quantityChange	Double	Quantity to add to or reduce from the asset's existing quantity.	Required	62.0

Response body for POST[Amendment](#)

Asset Cancellation (POST)

Initiate and execute the cancellation of an asset.

Special Access Rules

To use this API, you need the InitiateCancellation API permission set.

Resource

```
/connect/revenue-management/assets/actions/cancel
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/revenue-management/assets/actions/cancel
```

Available version

62.0

HTTP methods

POST

Request body for POST

JSON example

```
{
  "assetIds": [
    "02iSG0000003NMhYAM",
    "02iSG0000006DvSYAU"
  ],
  "cancellationDate": "2023-10-04T00:00:00",
  "contractId": "800SG00000CFpepYAD",
  "opportunityId": "006SG000004W5tVYAS",
  "outputRecordId": "801SG00000DX1jWYAT",
  "outputRecordType": "Quote"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
assetIds	String[]	IDs of the assets that you want to cancel. All assets in a request must belong to the same price book.	Required	62.0
cancellationDate	String	Effective date of the cancellation.	Required	62.0
contractId	String	ID of the Contract record that you want to sync with the cancellation quote.	Optional	62.0
opportunityId	String	ID of the Opportunity record that you want to sync with the cancellation quote.	Optional	62.0
outputRecordId	String	ID of the quote or order that you want to cancel.	Optional	62.0

Name	Type	Description	Required or Optional	Available Version
outputRecordType	String	Type of cancellation record that you want to create.	Required	62.0

Response body for POST[Cancellation](#)**Asset Renewal (POST)**

Initiate and execute the renewal of an asset.

Special Access Rules

To use this API, you need the InitiateRenewal API permission set.

Resource

```
/connect/revenue-management/assets/actions/renew
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/revenue-management/assets/actions/renew
```

Available version

62.0

HTTP methods

POST

Request body for POST**JSON example**

```
{
  "assetIds": [
    "02iSG0000003NMhYAM",
    "02iSG0000006DvSYAU"
  ],
  "contractId": "800SG00000CFpepYAD",
  "opportunityId": "006SG000004W5tVYAS",
  "outputRecordId": "801SG00000DX1jWYAT",
  "outputRecordType": "Quote",
  "renewalEndDate": "2024-10-03T23:59:59",
  "renewalStartDate": "2023-10-04T00:00:00"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
assetIds	String[]	IDs of the assets that you want to renew.	Required	62.0

Name	Type	Description	Required or Optional	Available Version
contractId	String	ID of the Contract record that you want to sync with the renewal of the Quote or Order record.	Optional	62.0
opportunityId	String	ID of the Opportunity record that you want to sync with the renewal quote.	Optional	62.0
outputRecordId	String	ID of the Quote or Order record that you want to renew.	Optional	62.0
outputRecordType	String	Type of renewal record that you want to create.	Required	62.0
renewalEndDate	String	End date of the renewal process for the assets.	Optional	62.0
renewalStartDate	String	Start date of the renewal process for the assets. Required for early asset renewals and renewing expired assets, using today's date or a future date.	Optional	62.0

Response body for POST[Renewal](#)

Clone Sales Transaction (POST)

Create a clone of a quote line item or an order item record with its related records and configurations. You can also clone all items in a quote line group or order item group when the record to clone is a quote line group or an order item group record.

This API supports the cloning of records for these objects.

- QuotelineItem
- OrderItem
- QuotelineGroup
- OrderItemGroup

Resource

```
/connect/rev/sales-transaction/actions/clone
```

Resource example

```
https://<vname>yourInstance</vname>.salesforce.com/services/data/v64.0/connect/rev/sales-transaction/actions/clone
```

Available version

64.0

HTTP methods

POST

Request body for POST**JSON example**

This is a sample request to clone a record within a sales transaction.

```
{
  "recordIds": ["0QLxx0000004CByGA2"],
  "salesTransactionId": "0Q0xx0000004CE0CAM"
}
```

This is a sample request to clone all line items in a ramped group within a sales transaction.

```
{
  "recordIds": ["0QLxx0000004CByGA2"],
  "salesTransactionId": "0Q0xx0000004CE0CAM",
  "options": {
    "lineScope": "AllLines"
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
recordIds	String[]	ID of the record to be cloned. You can specify a single record ID only.	Required	64.0
salesTransactionId	String	ID of the sales transaction related to the record IDs to clone.	Required	64.0
options	Clone Options Input	Specifies options to clone a ramp segment within a sales transaction. You can clone only the last ramp segment.	Optional	65.0

Response body for POST

[Clone Sales Transaction](#)

Instant Pricing (POST)

Fetch instant pricing data on the quote or order line data grid and associated summary component. It offers capabilities to either create a context or update the existing one based on the provided context ID.

You can also group quote line items or order items based on location, work types, or departments, if groups are enabled for your org. Groups provide a visualization of the products to view large quotes.

Resource

```
/industries/cpq/quotes/actions/get-instant-price
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/industries/cpq/quotes/actions/get-instant-price
```

Available version

60.0

Requires Chatter

No

HTTP methods

POST

Request body for POST**JSON example**

```
{
  "correlationId": "1234567",
  "contextId": "",
  "records": [
    {
      "referenceId": "refQuote",
      "record": {
        "attributes": {
          "type": "Quote",
          "method": "POST"
        },
        "Name": "Test Quote Proration Pricing",
        "OpportunityId": "006xx000001a4ISAAAY",
        "Pricebook2Id": "01sxx0000005ptpAAA"
      }
    },
    {
      "referenceId": "refQuoteLine",
      "record": {
        "attributes": {
          "type": "QuoteLineItem",
          "method": "POST"
        },
        "QuoteId": "refQuote",
        "PricebookEntryId": "01luxx0000008zHmAAI",
        "Product2Id": "01txx0000006jmWAAQ",
        "Quantity": 2,
        "UnitPrice": 25,
        "StartDate": "2022-09-28",
        "EndDate": "2028-09-27",
        "PeriodBoundary": "ANNIVERSARY",
        "BillingFrequency": "ANNUAL"
      }
    }
  ]
}
```

This example shows a sample request to specify grouping of lines based on criteria.

```
{
  "contextId": "",
  "correlationId": "",
  "records": [
    {
      "referenceId": "0Q0xx0000004DOSCA2",
      "record": {
```



```

        "attributes": {
            "type": "Quote",
            "method": "PUT"
        }
    },
    {
        "referenceId": "0QLxx0000004F3gGAE",
        "record": {
            "attributes": {
                "type": "QuoteLineItem",
                "method": "PUT"
            },
            "Quantity": 5
        }
    }, {
        "referenceId": "0QLxx0000004F3hGAE",
        "record": {
            "attributes": {
                "type": "QuoteLineItem",
                "method": "PUT"
            },
            "Quantity": 2
        }
    },
    {
        "referenceId": "GroupId1",
        "record": {
            "attributes": {
                "type": "QuoteLineGroup",
                "method": "POST",
                "action": "GroupBy",
                "criteria": {
                    "Quantity": 5
                }
            },
            "Name": "record"
        }
    }, {
        "referenceId": "GroupId2",
        "record": {
            "attributes": {
                "type": "QuoteLineGroup",
                "method": "POST",
                "action": "GroupBy",
                "criteria": {
                    "Quantity": 2
                }
            },
            "Name": "record1",
        }
    }
}
]
}

```

This example shows a sample request for the initial grouping of the quote with the quote lines assigned to the first group.

```
{
  "contextId": "",
  "correlationId": "",
  "records": [
    {
      "referenceId": "0Q0xx0000004CAgCAM",
      "record": {
        "attributes": {
          "type": "Quote",
          "method": "PUT"
        }
      }
    },
    {
      "referenceId": "GroupId1",
      "record": {
        "attributes": {
          "type": "QuoteLineGroup",
          "method": "POST",
          "action": "GroupAll"
        },
        "Name": "sample"
      }
    }
  ]
}
```

This example shows a sample request to ungroup a quote but retain the quote lines.

```
{
  "contextId": "",
  "correlationId": "",
  "records": [
    {
      "referenceId": "0Q0xx0000004CAgCAM",
      "record": {
        "attributes": {
          "type": "Quote",
          "method": "PUT"
        }
      }
    },
    {
      "referenceId": "0QLxx0000004CByGA2",
      "record": {
        "attributes": {
          "type": "QuoteLineItem",
          "method": "PUT"
        },
        "Quantity": 2,
        "QuoteLineGroupId": null
      }
    }
  ],
}
```

```

    {
      "referenceId": "GroupId1",
      "record": {
        "attributes": {
          "type": "QuoteLineGroup",
          "method": "DELETE",
          "action": "Ungroup"
        }
      }
    }
  ]
}

```

This example shows a sample request to create a new group.

```

{
  "contextId": "",
  "correlationId": "",
  "records": [
    {
      "referenceId": "0Q0xx0000004CAgCAM",
      "record": {
        "attributes": {
          "type": "Quote",
          "method": "PUT"
        }
      }
    },
    {
      "referenceId": "GroupId1",
      "record": {
        "attributes": {
          "type": "QuoteLineGroup",
          "method": "POST"
        },
        "Name": "sample"
      }
    }
  ]
}

```

This example shows a sample request to delete a group.

```

{
  "contextId": "",
  "correlationId": "",
  "records": [
    {
      "referenceId": "0Q0xx0000004CAgCAM",
      "record": {
        "attributes": {
          "type": "Quote",
          "method": "PUT"
        }
      }
    }
  ]
}

```

```

    },
    {
      "referenceId": "GroupId1",
      "record": {
        "attributes": {
          "type": "QuoteLineGroup",
          "method": "DELETE",
          "action": "DeleteGroup"
        },
        "Name": "sample"
      }
    }
  ]
}

```

This example shows a sample request to move a group.

```

{
  "contextId": "",
  "correlationId": "",
  "records": [
    {
      "referenceId": "0Q0xx0000004CAGCAM",
      "record": {
        "attributes": {
          "type": "Quote",
          "method": "PUT"
        }
      }
    },
    {
      "referenceId": "0QLxx0000004CBYGA2",
      "record": {
        "attributes": {
          "type": "QuoteLineItem",
          "method": "PUT"
        },
        "Quantity": 2
        "QuoteLineGroupId": "{@GroupId2}"
      }
    }
  ]
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
contextId	String	The ID generated by the context service. If no context ID is provided, a new context is created.	Optional	59.0
correlationId	String	Client-generated ID for tracking multiple related API requests.	Optional	59.0

Name	Type	Description	Required or Optional	Available Version
records	Object with Reference Input[]	List of pricing data to be fetched.	Required	59.0

Response body for POST[Instant Pricing](#)

Place Order (POST)

Place orders with integrated pricing, configuration, and validation, and manage them throughout their entire lifecycle. Additionally, update an order or insert order items.

You can also group order items based on location, work types, or departments, if groups are enabled for your org. Groups provide a visualization of the products to view large quotes.

This API supports a maximum of 300 transaction line items.

 **Note:** This API has been deprecated as of API version 63.0. In API version 63.0 and later, use the new [Place Sales Transaction](#) API.

Special Access Rules

You need the PlaceOrder API permission set to use this API.

Resource

```
/commerce/sales-orders/actions/place
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/commerce/sales-orders/actions/place
```

Available version

60.0

HTTP methods

POST

Request body for POST**JSON example**

```
{
  "pricingPref": "System",
  "configurationInput": "RunAndAllowErrors",
  "configurationOptions": {
    "validateProductCatalog": true,
    "validateAmendRenewCancel": true,
    "executeConfigurationRules": true,
    "addDefaultConfiguration": true
  },
  "graph": {
    "graphId": "graphId",
    "records": [
      {
        "referenceId": "refOrder",
```

```

    "record": {
      "attributes": {
        "type": "Order",
        "method": "POST",
        "Id": "POST"
      }
    },
    {
      "referenceId": "refOrderItem",
      "record": {
        "attributes": {
          "type": "OrderItem",
          "method": "POST"
        },
        "OrderId": "@{refOrder.id}",
        "OrderActionId": "@{refOrderAction.id}",
        "ListPrice": "144.99",
        "Quantity": 3,
        "PricebookEntryId": "01luxx0000008yXPAAY",
        "Product2Id": "01txx0000006i2UAAQ",
        "UnitPrice": "199.49"
      }
    }
  ]
}

```

This example shows a sample request to define grouping of order items.

```

{
  "pricingPref": "system",
  "graph": {
    "graphId": "placeOrder",
    "records": [
      {
        "referenceId": "refOrder",
        "record": {
          "attributes": {
            "type": "Order",
            "method": "PATCH",
            "id": "801xx000003GZ9bAAG"
          }
        }
      },
      {
        "referenceId": "refOlg1",
        "record": {
          "attributes": {
            "type": "OrderItemGroup",
            "method": "POST"
          },
          "Name": "New Group",
          "OrderId": "@{refOrder.id}"
        }
      }
    ]
  }
}

```

```

    }
  ]
}

```

This example shows a sample request to ungroup order items.

```

{
  "pricingPref": "system",
  "graph": {
    "graphId": "placeOrder",
    "records": [
      {
        "referenceId": "refOrder",
        "record": {
          "attributes": {
            "type": "Order",
            "method": "PATCH",
            "id": "refOrder"
          }
        }
      },
      {
        "referenceId": "refOlg1",
        "record": {
          "attributes": {
            "type": "OrderItemGroup",
            "method": "DELETE",
            "id": "refOlg1",
            "action": "Ungroup"
          }
        }
      }
    ]
  }
}

```

This example shows a sample request to create a new group.

```

{
  "pricingPref": "system",
  "graph": {
    "graphId": "placeOrder",
    "records": [
      {
        "referenceId": "refOrder",
        "record": {
          "attributes": {
            "type": "Order",
            "method": "PATCH",
            "id": "refOrder"
          }
        }
      }
    ]
  }
}

```

```

        "referenceId": "refOlg",
        "record": {
          "attributes": {
            "type": "OrderItemGroup",
            "method": "POST"
          },
          "Name": "New Group",
          "OrderId": "@{refOrder.id}"
        }
      ]
    }
  }
}

```

This example shows a sample request to delete a group.

```

{
  "contextId": "",
  "correlationId": "",
  "records": [
    {
      "referenceId": "refOrder",
      "record": {
        "attributes": {
          "type": "Order",
          "method": "PATCH",
          "id": "refOrder"
        }
      }
    },
    {
      "referenceId": "refOlg",
      "record": {
        "attributes": {
          "type": "OrderItemGroup",
          "method": "DELETE",
          "id": "refOlg",
          "action": "DeleteGroup"
        }
      }
    }
  ]
}

```

This example shows a sample request to group order items based on criteria.

```

{
  "pricingPref": "system",
  "graph": {
    "graphId": "placeOrder",
    "records": [
      {
        "referenceId": "refOrder",
        "record": {
          "attributes": {

```



```

        "type": "Order",
        "method": "PATCH",
        "id": "refOrder"
    }
}
},
{
    "referenceId": "g0",
    "record": {
        "attributes": {
            "type": "OrderItemGroup",
            "method": "POST",
            "action": "GroupBy",
            "criteria": {
                "BillingFrequency2": null
            }
        },
        "Name": "Billing Frequency: ",
        "OrderId": "@{refOrder.id}"
    }
},
{
    "referenceId": "g1",
    "record": {
        "attributes": {
            "type": "OrderItemGroup",
            "method": "POST",
            "action": "GroupBy",
            "criteria": {
                "BillingFrequency2": "Monthly"
            }
        },
        "Name": "Billing Frequency: Monthly",
        "OrderId": "@{refOrder.id}"
    }
}
]
}
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
catalog RatesPref	String	Rate card entries defined in the catalog that must be fetched for order items with usage-based pricing during the order creation process. Valid values are: <ul style="list-style-type: none"> Fetch—Retrieves the rate card entries defined in the catalog for order items during the order creation process. 	Optional	62.0

Name	Type	Description	Required or Optional	Available Version
		<ul style="list-style-type: none"> <code>skip</code>—Skips the retrieval of rate card entries for order items during the order creation process. <p>The default value is <code>skip</code>.</p> <p>This property is available when the Usage-Based Selling feature is enabled.</p>		
<code>configurationInput</code>	String	<p>Configuration input for the place order process. Valid values are:</p> <ul style="list-style-type: none"> <code>RunAndAllowErrors</code>—Specifies to run the configuration and to proceed order ingestion upon encountering any configuration errors. <code>RunAndBlockErrors</code>—Specifies to run configuration and to block order ingestion upon encountering any configuration errors. <code>skip</code>—Specifies to skip configuration. <p>The default value is <code>RunAndBlockErrors</code>.</p>	Optional	60.0
<code>configurationOptions</code>	Configuration Options Input[]	Configuration options during the ingestion process.	Optional	60.0
<code>graph</code>	Object Graph Input	The sObject graph of the order payload to be ingested. You can perform create, update, or delete operations on objects from the Sales Transaction context definition by using this property. Additionally, perform create, update, or delete operations on custom objects and fields in your extended context definition.	Required	60.0
<code>pricingPref</code>	String	<p>Pricing preference during the create order process. Valid values are:</p> <ul style="list-style-type: none"> <code>Force</code>—Specifies to force pricing during the order ingestion process. <code>skip</code>—Specifies to skip pricing during the order ingestion process. <code>System</code>—Specifies the system to determine whether a pricing calculation is required. 	Optional	60.0

Name	Type	Description	Required or Optional	Available Version
		The default value is <code>System</code> .		

Response body for POST

[Place Order](#)

Place Quote (POST)

Create a quote to discover and price products and services. Additionally, insert, update, or delete a quote line item.

You can also group quote line items based on location, work types, or departments, if groups are enabled for your org. Groups provide a visualization of the products to view large quotes.

This API supports a maximum of 300 transaction line items.

 **Note:** This API has been deprecated as of API version 63.0. In API version 63.0 and later, use the new [Place Sales Transaction](#) API.

Special Access Rules

You need the Create on Quotes user permission to create quotes.

Resource

```
/commerce/quotes/actions/place
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/commerce/quotes/actions/place
```

Available version

60.0

HTTP methods

POST

Request body for POST

JSON example

This example shows a sample request to create a quote.

```
{
  "pricingPref": "System",
  "configurationInput": "RunAndAllowErrors",
  "configurationOptions": {
    "validateProductCatalog": true,
    "validateAmendRenewCancel": true,
    "executeConfigurationRules": true,
    "addDefaultConfiguration": true
  },
  "graph": {
    "graphId": "createQuote",
    "records": [{
      "referenceId": "refQuote",
      "record": {
        "attributes": {
          "type": "Quote",
```

```

        "method": "POST"
      },
      "opportunityId": "---",
      "quoteProp1": "value1",
      "quoteProp2": "value2"
    }
  },
  {
    "referenceId": "refQuoteLineItem1",
    "record": {
      "attributes": {
        "type": "QuoteLineItem",
        "method": "POST"
      },
      "QuoteLineItemProp1": "value1",
      "QuoteLineItemProp2": "value2"
    }
  },
  {
    "referenceId": "refQuoteLineItemAttribute",
    "record": {
      "attributes": {
        "type": "QuoteLineItemAttribute",
        "method": "POST"
      },
      "QuoteLineItemId": "@{refQuoteLineItem1.id}",
      "AttributeDefinitionId": "0tjxx000000001AAA"
    }
  }
]
}
}

```

This example shows a sample request to insert, update, or delete a quote line item.

```

{
  "pricingPref": "System",
  "configurationInput": "skip",
  "graph": {
    "graphId": "updateQuote",
    "records": [
      {
        "referenceId": "refQuote",
        "record": {
          "attributes": {
            "type": "Quote",
            "method": "PATCH",
            "id": "0Q0xx0000004E2mCAE"
          },
          "Name": "Quote_Acme"
        }
      },
      {
        "referenceId": "refQuoteLineItemToCreate1",
        "record": {

```

```

    "attributes": {
      "type": "QuoteLineItem",
      "method": "POST"
    },
    "QuoteId": "0Q0xx0000004E2mCAE",
    "PricebookEntryId": "01luxx0000008yXPAAY",
    "Product2Id": "01txx0000006i2UAAQ",
    "Quantity": 2.0,
    "UnitPrice": 800.0,
    "PeriodBoundary": "Anniversary",
    "BillingFrequency": "Monthly",
    "StartDate": "2024-03-11"
  }
},
{
  "referenceId": "refQuoteLineItemToPatch2",
  "record": {
    "attributes": {
      "type": "QuoteLineItem",
      "method": "PATCH",
      "id": "0Q0xx0000004E2mCAE"
    },
    "Quantity": 2.0,
    "UnitPrice": 600.0
  }
},
{
  "referenceId": "refQuoteLineItemToDelete3",
  "record": {
    "attributes": {
      "type": "QuoteLineItem",
      "method": "DELETE",
      "id": "0Q0xx0000004E2mYLK"
    }
  }
}
]
}
}

```

This example shows a sample request to define grouping of quote line items.

```

{
  "pricingPref": "Force",
  "configurationInput": "skip",
  "graph": {
    "graphId": "groupLines",
    "records": [
      {
        "referenceId": "refQuote",
        "record": {
          "attributes": {
            "type": "Quote",
            "method": "PATCH",
            "id": "0Q0xx0000004C99CAE"
          }
        }
      }
    ]
  }
}

```

```

        },
        "Name": "From Place Quote API"
    }
},
{
    "referenceId": "refQlg1",
    "record": {
        "attributes": {
            "type": "QuoteLineGroup",
            "method": "POST",
            "action": "GroupBy",
            "criteria": {
                "Quantity": 1
            }
        },
        "Name": "From Place Quote API Group",
        "QuoteId": "@{refQuote.id}"
    }
},
{
    "referenceId": "refQuoteItem1",
    "record": {
        "attributes": {
            "type": "QuoteLineItem",
            "method": "PATCH",
            "id": "0QLxx0000004DJcGAM"
        },
        "QuoteLineGroupId": "@{refQlg1.id}",
        "Quantity": 1
    }
}
]
}
}

```

This example shows a sample request for the initial grouping of the quote with the quote lines assigned to the first group.

```

{
    "pricingPref": "Force",
    "graph": {
        "graphId": "test",
        "records": [
            {
                "referenceId": "refQuote",
                "record": {
                    "attributes": {
                        "type": "Quote",
                        "method": "PATCH",
                        "id": "0Q0xx0000004CAmCAM"
                    }
                }
            },
            {
                "referenceId": "refQlg1",
                "record": {

```

```

        "attributes": {
            "type": "QuoteLineGroup",
            "method": "POST",
            "action": "GroupAll"
        },
        "Name": "From PQ API Group",
        "QuoteId": "@{refQuote.id}"
    }
}
]
}
}

```

This example shows a sample request to ungroup a quote but retain the quote lines.

```

{
  "pricingPref": "Force",
  "configurationInput": "skip",
  "graph": {
    "graphId": "test",
    "records": [
      {
        "referenceId": "refQuote",
        "record": {
          "attributes": {
            "type": "Quote",
            "method": "PATCH",
            "id": "0Q0xx0000004C99CAE"
          },
          "Name": "From Place Quote API"
        }
      },
      {
        "referenceId": "refQlgl",
        "record": {
          "attributes": {
            "type": "QuoteLineGroup",
            "method": "DELETE",
            "id": "{GroupId}",
            "action": "Ungroup"
          }
        }
      }
    ]
  }
}

```

This example shows a sample request to create a new group.

```

{
  "pricingPref": "Force",
  "configurationInput": "skip",
  "graph": {
    "graphId": "test",
    "records": [

```

```

    {
      "referenceId": "refQuote",
      "record": {
        "attributes": {
          "type": "Quote",
          "method": "PATCH",
          "id": "0Q0xx0000004C99CAE"
        },
        "Name": "From Place Quote API"
      }
    },
    {
      "referenceId": "refQlgl",
      "record": {
        "attributes": {
          "type": "QuoteLineGroup",
          "method": "POST"
        },
        "Name": "From PQ API Group",
        "QuoteId": "@{refQuote.id}"
      }
    }
  ]
}

```

This example shows a sample request to delete a group.

```

{
  "pricingPref": "Force",
  "configurationInput": "skip",
  "graph": {
    "graphId": "test",
    "records": [
      {
        "referenceId": "refQuote",
        "record": {
          "attributes": {
            "type": "Quote",
            "method": "PATCH",
            "id": "0Q0xx0000004C99CAE"
          },
          "Name": "From Place Quote API"
        }
      },
      {
        "referenceId": "refQlgl",
        "record": {
          "attributes": {
            "type": "QuoteLineGroup",
            "method": "DELETE",
            "id": "{GroupId}",
            "action": "DeleteGroup"
          }
        }
      }
    ]
  }
}

```



```

    }
  ]
}

```

This example shows a sample request to move a group.

```

{
  "pricingPref": "Force",
  "configurationInput": "skip",
  "graph": {
    "graphId": "test",
    "records": [
      {
        "referenceId": "refQuote",
        "record": {
          "attributes": {
            "type": "Quote",
            "method": "PATCH",
            "id": "0Q0xx0000004C99CAE"
          },
          "Name": "From PlaceQuote Api"
        }
      },
      {
        "referenceId": "0QLxx0000004CByGA2",
        "record": {
          "attributes": {
            "type": "QuoteLineItem",
            "method": "PATCH"
          },
          "id": "0QLxx0000004CByGA2"
        },
        "Quantity": 2,
        "QuoteLineGroupId": "@{GroupId2}"
      }
    ]
  }
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
catalog RatesPref	String	Rate card entries defined in the catalog that must be fetched for quote line items with usage-based pricing during the quote creation process. Valid values are: <ul style="list-style-type: none"> Fetch—Retrieves the rate card entries defined in the catalog for quote line items during the quote creation process. 	Optional	62.0

Name	Type	Description	Required or Optional	Available Version
		<ul style="list-style-type: none"> <code>Skip</code>—Skips the retrieval of rate card entries for quote line items during the quote creation process. <p>The default value is <code>Skip</code>.</p> <p>This property is available when the Usage-Based Selling feature is enabled.</p>		
<code>configurationInput</code>	String	<p>Configuration input for the place quote process. Valid values are:</p> <ul style="list-style-type: none"> <code>RunAndAllowErrors</code> <code>RunAndBlockErrors</code> <code>Skip</code> <p>The default value is <code>RunAndBlockErrors</code>.</p>	Optional	60.0
<code>configurationOptions</code>	Configuration Options Input	Configuration options during the ingestion process.	Optional	60.0
<code>graph</code>	Object Graph Input	The sObject graph representing the quote structure. You can perform create, update, or delete operations on objects from the Sales Transaction context definition by using this property. Additionally, perform create, update, or delete operations on custom objects and fields in your extended context definition.	Required	60.0
<code>pricingPref</code>	String	<p>Pricing preference during the quote process. Valid values are:</p> <ul style="list-style-type: none"> <code>Force</code> <code>Skip</code> <code>System</code> <p>The default value is <code>System</code>.</p>	Optional	60.0

Response body for POST[Place Quote](#)**Place Sales Transaction (POST)**

Create a sales transaction, such as an order or a quote, with integrated pricing and configuration. Additionally, update an order or a quote, and insert and delete order or quote line items to calculate the estimated tax.

You can also group order or quote line items based on location, work types, or departments, if groups are enabled for your org. Groups provide a visualization of the products to view large quotes.

You can add up to 1000 quote line items for a quote, and 1000 order products for an order. For complex flows that involve a large volume of records, ensure that the number of line items that are sent to this API are within this limit.

Resource

```
/connect/rev/sales-transaction/actions/place
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/rev/sales-transaction/actions/place
```

Available version

63.0

HTTP methods

POST

Request body for POST

JSON example

This is a sample request to create a sales transaction for a quote. This example also skips tax calculation by specifying a value for the optional `taxPref` property.

```
{
  "pricingPref": "System",
  "catalogRatesPref": "Skip",
  "configurationPref": {
    "configurationMethod": "Skip",
    "configurationOptions": {
      "validateProductCatalog": true,
      "validateAmendRenewCancel": true,
      "executeConfigurationRules": true,
      "addDefaultConfiguration": true
    }
  },
  "taxPref": "Skip",
  "contextDetails": {
    "contextId": "e055bb18-d4e8-41c3-881e-0132b9561708"
  },
  "graph": {
    "graphId": "createQuote",
    "records": [
      {
        "referenceId": "refQuote",
        "record": {
          "attributes": {
            "method": "POST",
            "type": "Quote"
          },
          "Name": "Quote_Acme",
          "Pricebook2Id": "01sDU000000JvhbYAC"
        }
      },
      {
        "referenceId": "refQuoteLine0",
        "record": {
          "attributes": {
```

```

        "type": "QuoteLineItem",
        "method": "POST"
    },
    "QuoteId": "@{refQuote.id}",
    "Product2Id": "01tDU000000F7b8YAC",
    "PricebookEntryId": "01uDU000000fxt2YAA",
    "UnitPrice": 100,
    "Quantity": "1",
    "StartDate": "2024-10-29",
    "EndDate": "2025-03-01",
    "PeriodBoundary": "Anniversary"
    }
}
]
}
}

```

This sample request assigns a TransactionProcessingType record to a quote without any additional preferences. In this example, the TransactionType value for a record is set to a TransactionProcessingType record. See [TransactionProcessingType](#) on page 899 tooling object for more details.

```

{
  "pricingPref": "Force",
  "contextDetails": {
    "contextId": "f1c9e3e1c335f7959a88de09d3a867cc2b95e08709b99de8e2edeb8f5039e8ed",

    "scope": "Session"
  },
  "graph": {
    "graphId": "updateQuote",
    "records": [
      {
        "referenceId": "refQuote",
        "record": {
          "attributes": {
            "type": "Quote",
            "method": "POST"
          },
          "OpportunityId": "006xx000001a2oWAAQ",
          "PriceBook2Id": "01sxx0000005ptpAAA",
          "TransactionType": "SkipPricingAndRunTax",
          "Name": "Quote_No_Tax_System"
        }
      },
      {
        "referenceId": "refQLI1",
        "record": {
          "attributes": {
            "type": "QuoteLineItem",
            "method": "POST"
          },
          "QuoteId": "@{refQuote.id}",
          "UnitPrice": 49.99,
          "Product2Id": "01txx0000006i2aAAA",
          "PricebookEntryId": "01luxx0000008yX0AAI",

```

```

        "Quantity": 10
      }
    }
  ]
}

```

This is a sample request to insert, update, or delete a quote line item.

```

{
  {
    "pricingPref": "System",
    "catalogRatesPref": "Skip",
    "configurationPref": {
      "configurationMethod": "Skip",
      "configurationOptions": {
        "validateProductCatalog": true,
        "validateAmendRenewCancel": true,
        "executeConfigurationRules": true,
        "addDefaultConfiguration": true
      }
    },
    "contextDetails": {
      "contextId": "e055bb18-d4e8-41c3-881e-0132b9561708"
    },
    "graph": {
      "graphId": "updateQuote",
      "records": [
        {
          "referenceId": "refQuote",
          "record": {
            "attributes": {
              "method": "PATCH",
              "type": "Quote",
              "id": "801xx000003GZ9bAAG"
            }
          }
        },
        {
          "referenceId": "refQuoteLine0",
          "record": {
            "attributes": {
              "type": "QuoteLineItem",
              "method": "PATCH",
              "id": "402xx000003KY5vJGH"
            },
            "Quantity": "5"
          }
        }
      ]
    }
  }
}

```

This is a sample request to define grouping of quote line items.

```
{
  "pricingPref": "Force",
  "catalogRatesPref": "Skip",
  "configurationPref": {
    "configurationMethod": "Skip",
    "configurationOptions": {
      "validateProductCatalog": true,
      "validateAmendRenewCancel": true,
      "executeConfigurationRules": true,
      "addDefaultConfiguration": true
    }
  },
  "contextDetails": {
    "contextId": "e055bb18-d4e8-41c3-881e-0132b9561708"
  },
  "graph": {
    "graphId": "groupQuoteLines",
    "records": [
      {
        "referenceId": "refQuote",
        "record": {
          "attributes": {
            "method": "PATCH",
            "type": "Quote",
            "id": "801xx000003GZ9bAAG"
          }
        }
      },
      {
        "referenceId": "refQuoteLine0",
        "record": {
          "attributes": {
            "type": "QuoteLineItem",
            "method": "PATCH",
            "id": "402xx000003KY5vJGH"
          },
          "QuoteLineGroupId": "@{refQuote.id}"
        }
      }
    ]
  }
}
```

This is a sample request for the initial grouping of the quote with all the quote lines assigned to the first group.

```
{
  "pricingPref": "Force",
  "catalogRatesPref": "Skip",
  "graph": {
    "graphId": "groupQuote",
    "records": [
      {
        "referenceId": "refQuote",
```

```

    "record": {
      "attributes": {
        "type": "Quote",
        "method": "PATCH",
        "id": "0Q0xx0000004CAmCAM"
      }
    },
    {
      "referenceId": "refQlg1",
      "record": {
        "attributes": {
          "type": "QuoteLineGroup",
          "method": "POST",
          "action": "GroupAll"
        },
        "Name": "From PST API Group",
        "QuoteId": "@{refQuote.id}"
      }
    }
  ]
}

```

This is a sample request to ungroup a quote but retain the quote lines.

```

{
  "catalogRatesPref": "Skip",
  "pricingPref": "Force",
  "graph": {
    "graphId": "ungroupQuote",
    "records": [
      {
        "referenceId": "refQuote",
        "record": {
          "attributes": {
            "type": "Quote",
            "method": "PATCH",
            "id": "0Q0xx0000004C99CAE"
          },
          "Name": "Grouped Quote with PST API"
        }
      },
      {
        "referenceId": "refQlg1",
        "record": {
          "attributes": {
            "type": "QuoteLineGroup",
            "method": "DELETE",
            "id": "402xx000003KY5vJGH",
            "action": "Ungroup"
          }
        }
      }
    ]
  }
}

```

```
}
}
```

This is a sample request to create a new group.

```
{
  "catalogRatesPref": "Skip",
  "pricingPref": "Force",
  "graph": {
    "graphId": "createGroup",
    "records": [
      {
        "referenceId": "refQuote",
        "record": {
          "attributes": {
            "type": "Quote",
            "method": "PATCH",
            "id": "0Q0xx0000004C99CAE"
          },
          "Name": "Grouped Quote with PST API"
        }
      },
      {
        "referenceId": "refQlgl",
        "record": {
          "attributes": {
            "type": "QuoteLineGroup",
            "method": "POST"
          },
          "Name": "From PQ API Group",
          "QuoteId": "@{refQuote.id}"
        }
      }
    ]
  }
}
```

This example shows a sample request to delete a group.

```
{
  "catalogRatesPref": "Skip",
  "pricingPref": "Force",
  "graph": {
    "graphId": "deleteGroup",
    "records": [
      {
        "referenceId": "refQuote",
        "record": {
          "attributes": {
            "type": "Quote",
            "method": "PATCH",
            "id": "0Q0xx0000004C99CAE"
          },
          "Name": "Grouped Quote with PST API"
        }
      }
    ]
  }
}
```



```

    },
    {
      "referenceId": "refQlg1",
      "record": {
        "attributes": {
          "type": "QuoteLineGroup",
          "method": "DELETE",
          "id": "402xx000003KY5vJGH",
          "action": "DeleteGroup"
        }
      }
    }
  ]
}

```

This is a sample request to group order items based on criteria.

```

{
  "catalogRatesPref": "Skip",
  "pricingPref": "Force",
  "graph": {
    "graphId": "groupOrderItems",
    "records": [
      {
        "referenceId": "refOrder",
        "record": {
          "attributes": {
            "type": "Order",
            "method": "PATCH",
            "id": "0Q0xx0000004C99CAE"
          }
        }
      },
      {
        "referenceId": "refOlg1",
        "record": {
          "attributes": {
            "type": "OrderItemGroup",
            "method": "POST",
            "action": "GroupBy",
            "criteria": {
              "BillingFrequency2": null
            }
          },
          "Name": "Billing Frequency: ",
          "OrderId": "@{refOrder.id}"
        }
      },
      {
        "referenceId": "g1",
        "record": {
          "attributes": {
            "type": "OrderItemGroup",
            "method": "POST",

```

```

        "action": "GroupBy",
        "criteria": {
            "BillingFrequency2": "Monthly"
        }
    },
    "Name": "Billing Frequency: Monthly",
    "OrderId": "@{refOrder.id}"
}
]
}
}

```

This is a sample request to save changes to a ramp deal by using context ID. The context ID is returned by the Ramp Deal APIs. See [Create Ramp Deal \(POST\)](#).

```

{
  "pricingPref": "Force",
  "contextDetails": {
    "contextId": "f1c9e3e1c335f7959a88de09d3a867cc2b95e08709b99de8e2edeb8f5039e8ed",
    "scope": "Session"
  },
  "graph": {
    "graphId": "updateQuote",
    "records": [
      {
        "referenceId": "refQuote",
        "record": {
          "attributes": {
            "type": "Quote",
            "method": "PATCH",
            "id": "0Q0xx0000004DQ4CAM"
          }
        }
      }
    ]
  }
}

```

To see examples that specify actions to create ramp deals for groups, see [Group Ramp Action Input](#) on page 1003.

Properties

Name	Type	Description	Required or Optional	Available Version
catalogRates Pref	String	Rate card entries defined in the catalog that must be fetched for sales items with usage-based pricing during the creation of the sales transaction. Valid values are: <ul style="list-style-type: none"> Fetch—Retrieves the rate card entries defined in the catalog for sales 	Optional	63.0

Name	Type	Description	Required or Optional	Available Version
		<p>items during the creation of the sales transaction.</p> <ul style="list-style-type: none"> <code>Skip</code>—Skips the retrieval of rate card entries for sales items during the creation of the sales transaction. <p>The default value is <code>Skip</code>.</p> <p>This property is available when the Usage-Based Selling feature is enabled.</p>		
<code>configurationPref</code>	Configurator Preference Input	Configuration preference during the quote process. These preferences ensure that quotes are defined as per the requirement.	Optional	63.0
<code>contextDetails</code>	Context Input	Context details that are created for a sales transaction.	Required if the <code>graph</code> property isn't specified.	63.0
<code>graph</code>	Object Graph Input	<p>The sObject graph of the sales transaction to be ingested. You can perform create, update, or delete operations on objects from the Sales Transaction context definition by using this property. Additionally, perform create, update, or delete operations on custom objects and fields in your extended context definition.</p> <p>To create custom objects that are at the grandchildren level from a line item, you must create the hierarchy of objects until the grandchild object in the same request.</p>	Required if the <code>contextDetails</code> property isn't specified.	63.0
<code>groupRampAction</code>	String	<p>Specifies the action that you want to perform on group ramp segments. Additionally, you can also convert a non-ramped group into a ramped group. Valid values are:</p> <ul style="list-style-type: none"> <code>AddProducts</code>—Specifies to add rampable products to group ramp segments. <code>DeleteProducts</code>—Specifies to delete ramped products. <code>EditGroup</code>—Specifies to convert a non-ramped group into a group ramp segment, or edit group ramp 	Optional	65.0

Name	Type	Description	Required or Optional	Available Version
		<p>segment attributes such as name and description, except the start and end dates.</p> <ul style="list-style-type: none"> • <code>EditRampSchedule</code>—Specifies to edit details of the group ramp segments, including start and end dates. • <code>DeleteSegment</code>—Specifies to delete the first or last segment in a group ramp schedule. • <code>ConvertToNonRampedGroup</code>—Specifies to convert the first or last group ramp segment into a non-ramped group. <p>To add or delete ramped line items from multiple group ramp segments, pass all the applicable values in the <code>graph</code> property. See Group Ramp Action Input on page 1003 to refer to examples.</p>		
<code>pricingPref</code>	String	<p>Pricing preference during the creation of a sales transaction. Valid values are:</p> <ul style="list-style-type: none"> • <code>Force</code>—Specifies to enforce pricing during the creation of sales transactions. • <code>Skip</code>—Specifies to skip pricing during the creation of sales transactions. • <code>System</code>—Specifies the system to determine whether a pricing calculation is required. <p>The default value is <code>System</code>.</p>	Optional	63.0
<code>taxPref</code>	String	<p>Specifies whether to execute or skip the tax calculation step for each sales transaction record. Valid value is <code>Skip</code>. If this value isn't specified, then tax calculation request is performed by default.</p>	Optional	65.0

Response body for POST[Place Sales Transaction](#)

Place Supplemental Transaction (POST)

Create a supplemental order or change orders after they are submitted for processing, such as during the fulfillment process.

Keep these considerations in mind when you use this API.

- The original order must not be assetized.
- If Billing is enabled and configured for the order, verify that the original order hasn't been billed.
- If Dynamic Revenue Orchestration (DRO) is enabled and configured for the order, ensure the original order hasn't reached the point of no return milestone. If point of no return milestone hasn't been reached, the fulfillment plan is frozen.

Resource

```
/connect/rev/sales-transaction/actions/place-supplemental-transaction
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/rev/sales-transaction/actions/place-supplemental-transaction
```

Available version

64.0

HTTP methods

POST

Request body for POST

JSON example

This sample creates a supplemental order, which is a clone of the original order. The supplemental order is related to the original order.

```
{
  "relatedSalesTransactionId": "801S70000001VKgIAM"
}
```

This sample overrides a field value of an order line item to supplement the order item with ID value as 802SG000003vZ15YAE.

```
{
  "relatedSalesTransactionId": "801S70000001VKgIAM",
  "pricingPref": "System",
  "supplementalGraph": {
    "graphId": "1",
    "records": [
      {
        "referenceId": "refOrder",
        "record": {
          "attributes": {
            "type": "Order",
            "method": "PATCH",
            "id": "801S70000001VKgIAM"
          },
          "EffectiveDate": "2025-03-01",
          "QuoteId": "0Q0xx0000004DQ4CAM"
        }
      },
      {
        "referenceId": "refOrderItem",
        "record": {
```

```

    "attributes": {
      "type": "OrderItem",
      "method": "PATCH",
      "id": "802SG000003vZ15YAE"
    },
    "QuoteLineItemId": "0Q0xx0000004E2mYLK"
  }
}
]
}
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
pricingPref	String	<p>Pricing preference for this supplemental transaction or order ingestion process.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> <code>Force</code>—Specifies to enforce pricing during the creation of sales transactions. <code>Skip</code>—Specifies to skip pricing during the creation of sales transactions. <code>System</code>—Specifies the system to determine whether a pricing calculation is required. <p>If <code>pricingPref</code> value is defined as either <code>Force</code> or <code>System</code>, the supplemental order can have a different pricing from the original order.</p>	Optional	64.0
relatedSalesTransactionId	String	Related or the original sales transaction upon which a supplemental transaction is created.	Required	64.0
supplementalGraph	Object Graph Input	<p>The sObject graph that represents a payload with the additional changes to be ingested.</p> <p>The attribute's HTTP method must be <code>PATCH</code>. The attribute ID must be the ID of the original order or order item that you want to supplement.</p>	Optional	64.0

Response body for POST [Supplemental Transaction](#)

Preview Approval (POST)

Preview the approval levels of a record and associated level details, approval chains, approvers, and conditions before you submit the record for an approval.

For example, a sales rep working on a quote can preview the approval levels for a quote before submitting the quote for approval.

Resource

```
/connect/advanced-approvals/approval-submission/preview
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/advanced-approvals/approval-submission/preview
```

Available version

65.0

HTTP methods

POST

Request body for POST

JSON example

```
{
  "flowApiName": "QuoteApprovals",
  "objectApiName": "Quote",
  "recordId": "0Q0DU0000005HZC0A2"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
flowApiName	String	API name of the auto-launched flow.	Required	65.0
objectApiName	String	API name of the object to preview the approvals for.	Required	65.0
recordId	String	ID of the record to preview the approvals for.	Required	65.0

Response body for POST

[Preview Approval](#)

Read Sales Transaction (POST)

Retrieve sales transaction data efficiently from an initialized or a hydrated context.

Resource

```
/connect/revenue/transaction-management/sales-transactions/actions/read
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/revenue/transaction-management/sales-transactions/actions/read
```

Available version

65.0

HTTP methods

POST

Request body for POST**JSON example**

```
{
  "contextId": "008d27d7-e004-4906-a949-ee7d7c323c77",
  "queryTags": [
    "Quote",
    "QuoteLineItem",
    "Product"
  ]
}
```

Properties


Name	Type	Description	Required or Optional	Available Version
contextId	String	ID of the context to retrieve the data records.	Required	65.0
queryTags	List<String>	List of objects that must be retrieved from the context.	Optional	65.0

Response body for POST[Read Sales Transaction](#)

Create Ramp Deal (POST)

Create a ramp deal for a customer on a product. Sales reps can use ramp deals to provide yearly deals to a customer, resulting in long-term revenue and customer relationship. A customer can create, update, or view multiple segments of periods for their subscription term with different attributes for each segment.

This API request creates segments based on the specified input properties such as term, segment type, and trial details. The API response includes the context ID and the updated context object for the sales transaction. You must call the Place Sales Transaction API by specifying this context ID to apply the ramp deal updates. See [Place Sales Transaction API](#).

 **Note:** This API is applicable when you're working with line ramps. To work with ramp deals for groups, you must use the Place Sales Transaction API and specify the `groupRampActions` property.

Resource

```
/connect/revenue-management/sales-transaction-contexts/resourceId/actions/ramp-deal-create
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/revenue-management/sales-transaction-contexts/008d27d7-e004-4906-a949-ee7d7c323c77/actions/ramp-deal-create
```

Available version

62.0

HTTP methods

POST

Path parameter for POST

Name	Type	Description	Required or Optional	Available Version
resourceId	String	ID of the quote line item, order item, or context.	Required	62.0

Request body for POST**JSON example**

```
{
  "transactionId": "0Q0xx0000004C92CAE",
  "transactionLineId": "0QLxx0000004C9VGAU",
  "subscriptionTerm": 14,
  "subscriptionTermUnit": "MONTHS",
  "trialTerm": 45,
  "trialTermUnit": "DAYS",
  "segmentType": "YEARLY",
  "executionSettings": {
    "executePricing": true,
    "executeConfigRules": false
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
execution Settings	Execution Settings Input[]	Settings to run the pricing or configuration rules.	Optional	62.0
segmentType	String	Type of segment that the user wants to create. Valid values are: <ul style="list-style-type: none"> • FREE_TRIAL • CUSTOM • YEARLY 	Required	62.0
subscription Term	Integer	Subscription length of the term-defined product.	Required	62.0
subscription TermUnit	String	Unit of time for the subscription length. Valid value is: <ul style="list-style-type: none"> • MONTHS 	Required	62.0

Name	Type	Description	Required or Optional	Available Version
transaction Id	String	ID of the sales transaction that's configured, such as quote or order.	Required	62.0
transaction LineId	String	Quote line item ID or order item ID that the price ramp is created for.	Required	62.0
trialTerm	Integer	Length of the trial period, if any.	Optional	62.0
trialTerm Unit	String	Unit of time for the trial period. Valid value is: <ul style="list-style-type: none">DAYS	Optional. Required if trialTerm property is specified.	62.0

Response body for POST

[Ramp Deal Service](#)

Delete Ramp Deal (POST)

Delete a ramp deal to convert a ramped product to include a single quote line item or order item.

This API request deletes the segments related to the product. The API response includes the updated context with the context ID. You must call the Place Sales Transaction (POST) API by specifying this context ID to apply the ramp deal updates. See [Place Sales Transaction \(POST\) API](#).

 **Note:** This API is applicable when you're working with line ramps. To work with ramp deals for groups, you must use the Place Sales Transaction API and specify the groupRampActions property.

Resource

```
/connect/revenue-management/sales-transaction-contexts/resourceId/actions/ramp-deal-delete
```

Resource example

```
https://yourInstancesalesforce.com/services/data/v65.0/connect/revenue-management/sales-transaction-contexts/01900000487676actions/ramp-deal-delete
```

Available version

62.0

HTTP methods

POST

Path parameter for POST

Name	Type	Description	Required or Optional	Available Version
resourceId	String	ID of the context.	Required	62.0

Request body for POST**JSON example**

```
{
  "rampDealIds": [
    "0Q0xx0000004CDxCAM",
    "0QLxx0000004CSOGA2"
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
rampDealIds	String[]	Ramp identifier on the quote line item or order item.	Required	62.0

Response body for POST

[Ramp Deal Service](#)


Update Ramp Deal (POST)

Modify a ramp deal in scenarios where a segment has updates such as quantity, discount, or date change.

Update a ramp deal in these scenarios.

- A segment has quantity or discount changes.
- A trial segment or custom segment has a date change. A custom segment is an added or deleted segment. In this scenario, you can update a ramp deal during the initial sale before assetization.

This API request returns the updated context with the context ID. You must call the Place Sales Transaction (POST) API by specifying this context ID to apply the ramp deal updates. See [Place Sales Transaction \(POST\) API](#).

 **Note:** This API is applicable when you're working with line ramps. To work with ramp deals for groups, you must use the Place Sales Transaction API and specify the `groupRampActions` property.

Resource

```
/connect/revenue-management/sales-transaction-contexts/resourceId/actions/ramp-deal-update
```

Resource example

```
https://yournamesalesforce.com/services/data/v62.0/connect/revenue-management/sales-transaction-contexts/42355498789010163970710272005771110-9/actions/ramp-deal-update
```

Available version

62.0

HTTP methods

POST

Path parameter for POST

Name	Type	Description	Required or Optional	Available Version
resourceId	String	ID of the context data that's used to build the pricing procedure. Get the context instance ID by invoking the Context Service API. See Context Service (POST) .	Required	62.0

Request body for POST**JSON example**

```
{
  "executionSettings": {
    "executePricing": true,
    "executeConfigRules": false
  },
  "addedNodes": [
    {
      "contextNodePath": [
        "4f23961a5c98806f89305e064c67b397e93f1bb8a2a7a3a80db506f1d4110ee9", // Context
ID
        "0Q0xx0000004CPACA2", //Quote or Order ID
        "RandomUUID" // random UUID for Quote Line Item or Order Item ID
      ],
      "contextNode": {
        "Discount": 10,
        "Quantity": 5,
        "ItemSegmentName": "Year 5",
        "StartDate": "2024-09-07T00:00:00.000Z",
        "EndDate": "2024-09-07T00:00:00.000Z"
      }
    }
  ],
  "updatedNodes": [
    {
      "contextNodePath": [
        "4f23961a5c98806f89305e064c67b397e93f1bb8a2a7a3a80db506f1d4110ee9", // Context
ID
        "0Q0xx0000004CPACA2", //Quote or Order ID
        "0QLxx0000004CfIGAU" // Quote Line ID or Order Line ID to update
      ],
      "contextNode": {
        "Discount": 10,
        "Quantity": 5
      }
    }
  ],
  "deletedNodes": [
    {
```

```

    "contextNodePath": [
      "4f23961a5c98806f89305e064c67b397e93f1bb8a2a7a3a80db506f1d4110ee9",
      "0Q0xx0000004CPACA2",
      "0QLxx0000004CfIGAU" // Quote Line Item ID to delete
    ]
  }
]
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
addedNodes	Context Node Input[]	Details of the nodes to be added.	Required	62.0
deletedNodes	Context Node Input[]	Details of the nodes to be deleted.	Required	62.0
execution Settings	Execution Settings Input[]	Settings to run the pricing or configuration rules.	Optional	62.0
updatedNodes	Context Node Input[]	Details of the nodes to be updated.	Required	62.0

Response body for POST

[Ramp Deal Service](#)

View Ramp Deal (GET)

View a ramp deal related to a quote line item or an order item.

This API request retrieves the segments if the ramp deal already exists.



Note: This API is applicable when you're working with line ramps. To work with ramp deals for groups, you must use the Place Sales Transaction API and specify the `groupRampActions` property.

Resource

```
/connect/revenue-management/sales-transaction-contexts/resourceId/actions/ramp-deal-view
```

Resource example

```
https://your-tenant-id.salesforce.com/services/data/v50.0/connect/revenue-management/sales-transaction-contexts/0Q0xx0000004CPACA2/actions/ramp-deal-view?contextNodePath=0QLxx0000004CfIGAU
```

Available version

62.0

HTTP methods

GET

Path parameter for GET

Name	Type	Description	Required or Optional	Available Version
resourceId	String	ID of the quote line item, order item, or context.	Required	62.0

Request parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
transactionId	String	ID of the quote or order required to hydrate the context and retrieve the quote lines.	Required	62.0
transactionLineId	String	ID of the quote or order line required to retrieve the segmented details.	Required	62.0

Response body for GET

[Ramp Deal Service](#)

Request Bodies

Learn more about the available API request bodies.

[Amendment Input](#)

Input representation of the details of the request to create an amendment record.

[Cancellation Input](#)

Input representation of the details of the request to cancel a quote or an order.

[Create Ramp Deal Input](#)

Input representation of the request to create a ramp deal.

[Clone Options Input](#)

Input representation of the options to clone a sales transaction.

[Clone Sales Transaction Input](#)

Input representation of the request to clone records within a sales transaction.

[Configuration Options Input](#)

Input representation for the configuration options.

[Configurator Preference Input](#)

Input representation of the configuration preference for the place sales transaction request.

[Context Input](#)

Input representation of the context that's associated with a sales transaction for a quote or an order.

[Context Node Input](#)

Input representation of the details of the context nodes for ramp segments.

[Delete Ramp Deal Input](#)

Input representation of the request to delete a ramp deal.

[Execution Settings Input](#)

Input representation of the execution settings for a ramp deal.

[Instant Pricing Input](#)

Input representation to fetch the instant pricing details.

[Object Graph Input](#)

Input representation of an sObject with a graph ID.

[Object Input Map](#)

Input representation of an sObject record in a key-value map format.

[Object with Reference Input](#)

Input representation of a list of records to be inserted or updated. To update a record, specify the record ID.

[Place Order Input](#)

Input representation of the request to create or update an order.

[Preview Approval Input](#)

Input representation of the details of the request to preview an approval.

[Place Quote Input](#)

Input representation of the request to create or update a quote.

[Read Sales Transaction Input](#)

Input representation of the filter criteria details to read a sales transaction.

[Renewal Input](#)

Input representation of the details of the request to initiate the renewal of an asset.

[Sales Transaction Input](#)

Input representation of the details of the request to place a sales transaction, such as a quote or an order.

[Supplemental Transaction Input](#)

Input representation of the details of the request to create a supplemental order.

[Update Ramp Deal Input](#)

Input representation of the request to update a ramp deal.

Amendment Input

Input representation of the details of the request to create an amendment record.

JSON example

```
{
  "assetIds": [
    "02iSG0000003NMhYAM",
    "02iSG0000006DvSYAU"
  ],
  "amendmentStartDate": "2023-10-04T00:00:00",
  "contractId": "800SG00000CFpepYAD",
```

```

"opportunityId": "006SG000004W5tVYAS",
"outputRecordId": "801SG00000DX1jWYAT",
"outputRecordType": "Quote",
"quantityChange": 5
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
assetIds	String[]	IDs of the assets that you want to add to the amendment record.	Required	62.0
amendmentStart Date	String	Start date of the amendment.	Required	62.0
contractId	String	ID of the Contract record that you want to sync with the amendment quote.	Optional	62.0
opportunityId	String	ID of the Opportunity record that you want to sync with the amendment quote.	Optional	62.0
outputRecord Id	String	ID of the quote or order record that you want to add the assets to.	Optional	62.0
output RecordType	String	Type of amendment record that you want to create.	Required	62.0
quantity Change	Double	Quantity to add to or reduce from the asset's existing quantity.	Required	62.0

Cancellation Input

Input representation of the details of the request to cancel a quote or an order.

JSON example

```

{
  "assetIds": [
    "02iSG0000003NMhYAM",
    "02iSG0000006DvSYAU"
  ],
  "cancellationDate": "2023-10-04T00:00:00",
  "contractId": "800SG00000CFpepYAD",
  "opportunityId": "006SG000004W5tVYAS",
  "outputRecordId": "801SG00000DX1jWYAT",
  "outputRecordType": "Quote"
}

```


Properties

Name	Type	Description	Required or Optional	Available Version
assetIds	String[]	IDs of the assets that you want to cancel. All assets in a request must belong to the same price book.	Required	62.0
cancellationDate	String	Effective date of the cancellation.	Required	62.0
contractId	String	ID of the Contract record that you want to sync with the cancellation quote.	Optional	62.0
opportunityId	String	ID of the Opportunity record that you want to sync with the cancellation quote.	Optional	62.0
outputRecordId	String	ID of the quote or order that you want to cancel.	Optional	62.0
outputRecordType	String	Type of cancellation record that you want to create.	Required	62.0

Create Ramp Deal Input

Input representation of the request to create a ramp deal.

JSON example

```
{
  "transactionId": "0Q0xx0000004C92CAE",
  "transactionLineId": "0QLxx0000004C9VGAU",
  "subscriptionTerm": 14,
  "subscriptionTermUnit": "MONTHS",
  "trialTerm": 45,
  "trialTermUnit": "DAYS",
  "segmentType": "YEARLY",
  "executionSettings": {
    "executePricing": true,
    "executeConfigRules": false
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
executionSettings	Execution Settings Input	Settings to run the pricing or configuration rules.	Optional	62.0
segmentType	String	Type of segment that the user wants to create. Valid values are:	Required	62.0

Name	Type	Description	Required or Optional	Available Version
		<ul style="list-style-type: none"> • FREE_TRIAL • CUSTOM • YEARLY 		
subscriptionTerm	Integer	Subscription length of the term-defined product.	Required	62.0
subscriptionTermUnit	String	Unit of time for the subscription length. Valid value is: <ul style="list-style-type: none"> • MONTHS 	Required	62.0
transactionId	String	ID of the sales transaction that's configured, such as quote or order.	Required	62.0
transactionLineId	String	Quote line item ID or order item ID that the price ramp is created for.	Required	62.0
trialTerm	Integer	Length of the trial period, if any.	Optional	62.0
trialTermUnit	String	Unit of time for the trial period. Valid value is: <ul style="list-style-type: none"> • DAYS 	Optional. Required if <code>trialTerm</code> property is specified.	62.0

Clone Options Input

Input representation of the options to clone a sales transaction.

JSON example

This is a sample request to clone all line items in a ramped group within a sales transaction.

```
{
  "recordIds": ["0QLxx0000004CUBYGA2"],
  "salesTransactionId": "0Q0xx0000004CEOCAM",
  "options": {
    "lineScope": "AllLines"
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
recordTypeId	String	ID of the record type related to the record to clone.	Optional	65.0
lineScope	String	Specifies the scope for cloning a ramp segment. You can clone only the last ramp	Optional	65.0

Name	Type	Description	Required or Optional	Available Version
		<p>segment. This property determines which line items must be cloned and added to the cloned segment. Valid values are:</p> <ul style="list-style-type: none"> • AllLines—Specifies whether all line items in a ramped group must be cloned. • RampedLinesOnly—Specifies whether only the ramped line items must be cloned. <p>A segment identifier is created for the newly cloned line items, ensuring date continuity between the existing and cloned segment.</p>		

Clone Sales Transaction Input

Input representation of the request to clone records within a sales transaction.

JSON example

This is a sample request to clone a record within a sales transaction.

```
{
  "recordIds": ["0QLxx0000004CBYGA2"],
  "salesTransactionId": "0Q0xx0000004CE0CAM"
}
```

This is a sample request to clone all line items in a ramped group within a sales transaction.

```
{
  "recordIds": ["0QLxx0000004CBYGA2"],
  "salesTransactionId": "0Q0xx0000004CE0CAM",
  "options": {
    "lineScope": "AllLines"
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
recordIds	String[]	ID of the record to be cloned. You can specify a single record ID only.	Required	64.0
salesTransactionId	String	ID of the sales transaction related to the record IDs to clone.	Required	64.0

Name	Type	Description	Required or Optional	Available Version
options	Clone Options Input	Specifies options to clone a ramp segment within a sales transaction. You can clone only the last ramp segment.	Optional	65.0

Configuration Options Input

Input representation for the configuration options.

JSON example

```
{
  "configurationOptions": {
    "validateProductCatalog": true,
    "validateAmendRenewCancel": true,
    "executeConfigurationRules": true,
    "addDefaultConfiguration": true
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
addDefault Configuration	Boolean	Indicates whether to automatically add default configurations to the order (<code>true</code>) or not (<code>false</code>).	Optional	60.0
execute Configuration Rules	Boolean	Indicates whether the order must adhere to configuration rules during processing (<code>true</code>) or bypass them (<code>false</code>).	Optional	60.0
validateAmend RenewCancel	Boolean	Indicates whether to run validations related to amend, renew, or cancel processes (<code>true</code>) or not (<code>false</code>).	Optional	60.0
validate Product Catalog	Boolean	Indicates whether the order must be validated against the product catalog (<code>true</code>) or not (<code>false</code>).	Optional	60.0

Configurator Preference Input

Input representation of the configuration preference for the place sales transaction request.

JSON example

```
{
  "configurationPref": {
    "configurationMethod": "Skip",
    "configurationOptions": {
```

```

    "validateProductCatalog": true,
    "validateAmendRenewCancel": true,
    "executeConfigurationRules": true,
    "addDefaultConfiguration": true
  }
}
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
configuration Method	String	Configuration method for the place sales transaction request. Valid values are: <ul style="list-style-type: none"> • Force—Specifies to enforce the predefined configuration process during the sales transaction process. • Skip—Specifies to skip the configuration process during the quote creation process. • System—Specifies the system to determine whether the configuration process is required. The default value is <code>Skip</code> .	Optional	63.0
configuration Options	Configuration Options Input	Configuration options during the ingestion process.	Optional	63.0

Context Input

Input representation of the context that's associated with a sales transaction for a quote or an order.

JSON example

```

{
  "contextDetails": {
    "contextId": "e055bb18-d4e8-41c3-881e-0132b9561708"
  }
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
contextId	String	ID of the context that represents the created session for the sales transaction. This property is supported only for a PATCH request.	Optional	63.0

Name	Type	Description	Required or Optional	Available Version
		If the <code>contextId</code> property isn't specified, the Place Sales Transaction API generates the context ID for the sales transaction.		

Context Node Input

Input representation of the details of the context nodes for ramp segments.

JSON example

```
"updatedNodes": [
  {
    "contextNodePath": [
      "4f23961a5c98806f89305e064c67b397e93f1bb8a2a7a3a80db506f1d4110ee9", // ContextId

      "0Q0xx0000004CPACA2", //Quote or OrderId
      "0QLxx0000004CfIGAU" // Quote Line ID or Order Line ID to update
    ],
    "contextNode": {
      "Discount": 10,
      "Quantity": 5
    }
  },
  {
    "contextNodePath": [
      "4f23961a5c98806f89305e064c67b397e93f1bb8a2a7a3a80db506f1d4110ee9",
      "0Q0xx0000004CPACA2",
      "2b6401d144904e10aa"
    ],
    "contextNode": {
      "Discount": 20,
      "Quantity": 15
    }
  }
]
```

Properties

Name	Type	Description	Required or Optional	Available Version
<code>contextNode</code>	Map<String, Object>	Details of the context node to be added, updated, or deleted.	Required	62.0
<code>contextNode Path</code>	String[]	Path to the context node to be added, updated, or deleted.	Required	62.0

Delete Ramp Deal Input

Input representation of the request to delete a ramp deal.

JSON example

```
{
  "rampDealIds": [
    "0Q0xx0000004CDxCAM",
    "0QLxx0000004CSOGA2"
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
rampDealIds	String[]	Ramp identifier on the quote line item or order item.	Required	62.0

Execution Settings Input

Input representation of the execution settings for a ramp deal.

JSON example

```
"executionSettings": {
  "executePricing": true,
  "executeConfigRules": false
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
executeConfigRules	Boolean	Indicates whether to run configuration rules (<code>true</code>) or not (<code>false</code>). The default value is <code>true</code> .	Optional	62.0
executePricing	Boolean	Indicates whether to run pricing request (<code>true</code>) or not (<code>false</code>). The default value is <code>true</code> .	Optional	62.0

Instant Pricing Input

Input representation to fetch the instant pricing details.

JSON example

```
{
  "correlationId": "1234567",
  "contextId": "",
}
```

```

"records": [
  {
    "referenceId": "refQuote",
    "record": {
      "attributes": {
        "type": "Quote",
        "method": "POST"
      },
      "Name": "Test Quote Proration Pricing",
      "OpportunityId": "006xx000001a4ISAAY",
      "Pricebook2Id": "01sxx0000005ptpAAA"
    }
  },
  {
    "referenceId": "refQuoteLine",
    "record": {
      "attributes": {
        "type": "QuoteLineItem",
        "method": "POST"
      },
      "QuoteId": "refQuote",
      "PricebookEntryId": "01luxx0000008zHmAAI",
      "Product2Id": "01txx0000006jmWAAQ",
      "Quantity": 2,
      "UnitPrice": 25,
      "StartDate": "2022-09-28",
      "EndDate": "2028-09-27",
      "PeriodBoundary": "ANNIVERSARY",
      "BillingFrequency": "ANNUAL"
    }
  }
]
}

```

This example shows a sample request to specify grouping of lines based on criteria.

```

{
  "contextId": "",
  "correlationId": "",
  "records": [
    {
      "referenceId": "0Q0xx0000004DOSCA2",
      "record": {
        "attributes": {
          "type": "Quote",
          "method": "PUT"
        }
      }
    },
    {
      "referenceId": "0QLxx0000004F3gGAE",
      "record": {
        "attributes": {
          "type": "QuoteLineItem",
          "method": "PUT"
        }
      }
    }
  ]
}

```



```

        },
        "Quantity": 5
    }
}, {
    "referenceId": "0QLxx0000004F3hGAE",
    "record": {
        "attributes": {
            "type": "QuoteLineItem",
            "method": "PUT"
        },
        "Quantity": 2
    }
},
{
    "referenceId": "GroupId1",
    "record": {
        "attributes": {
            "type": "QuoteLineGroup",
            "method": "POST",
            "action": "GroupBy",
            "criteria": {
                "Quantity": 5
            }
        },
        "Name": "record"
    }
}, {
    "referenceId": "GroupId2",
    "record": {
        "attributes": {
            "type": "QuoteLineGroup",
            "method": "POST",
            "action": "GroupBy",
            "criteria": {
                "Quantity": 2
            }
        },
        "Name": "record1",
    }
}
]
}

```

This example shows a sample request for the initial grouping of the quote with the quote lines assigned to the first group.

```

{
    "contextId": "",
    "correlationId": "",
    "records": [
        {
            "referenceId": "0Q0xx0000004CAgCAM",
            "record": {
                "attributes": {
                    "type": "Quote",
                    "method": "PUT"
                }
            }
        }
    ]
}

```

```

        }
      },
    {
      "referenceId": "GroupId1",
      "record": {
        "attributes": {
          "type": "QuoteLineGroup",
          "method": "POST",
          "action": "GroupAll"
        },
        "Name": "sample"
      }
    }
  ]
}

```

This example shows a sample request to ungroup a quote but retain the quote lines.

```

{
  "contextId": "",
  "correlationId": "",
  "records": [
    {
      "referenceId": "0Q0xx0000004CAGCAM",
      "record": {
        "attributes": {
          "type": "Quote",
          "method": "PUT"
        }
      }
    },
    {
      "referenceId": "0QLxx0000004CBYGA2",
      "record": {
        "attributes": {
          "type": "QuoteLineItem",
          "method": "PUT"
        },
        "Quantity": 2,
        "QuoteLineGroupId": null
      }
    },
    {
      "referenceId": "GroupId1",
      "record": {
        "attributes": {
          "type": "QuoteLineGroup",
          "method": "DELETE",
          "action": "Ungroup"
        }
      }
    }
  ]
}

```

This example shows a sample request to create a new group.

```
{
  "contextId": "",
  "correlationId": "",
  "records": [
    {
      "referenceId": "0Q0xx0000004CAgCAM",
      "record": {
        "attributes": {
          "type": "Quote",
          "method": "PUT"
        }
      }
    },
    {
      "referenceId": "GroupId1",
      "record": {
        "attributes": {
          "type": "QuoteLineGroup",
          "method": "POST"
        },
        "Name": "sample"
      }
    }
  ]
}
```

This example shows a sample request to delete a group.

```
{
  "contextId": "",
  "correlationId": "",
  "records": [
    {
      "referenceId": "0Q0xx0000004CAgCAM",
      "record": {
        "attributes": {
          "type": "Quote",
          "method": "PUT"
        }
      }
    },
    {
      "referenceId": "GroupId1",
      "record": {
        "attributes": {
          "type": "QuoteLineGroup",
          "method": "DELETE",
          "action": "DeleteGroup"
        },
        "Name": "sample"
      }
    }
  ]
}
```

```

]
}

```

This example shows a sample request to move a group.

```

{
  "contextId": "",
  "correlationId": "",
  "records": [
    {
      "referenceId": "0Q0xx0000004CAgCAM",
      "record": {
        "attributes": {
          "type": "Quote",
          "method": "PUT"
        }
      }
    },
    {
      "referenceId": "0QLxx0000004CByGA2",
      "record": {
        "attributes": {
          "type": "QuoteLineItem",
          "method": "PUT"
        },
        "Quantity": 2
        "QuoteLineGroupId": "{@GroupId2}"
      }
    }
  ]
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
contextId	String	The ID generated by the context service. If no context ID is provided, a new context is created.	Optional	59.0
correlationId	String	Client-generated ID for tracking multiple related API requests.	Optional	59.0
records	Object with Reference Input[]	List of pricing data to be fetched.	Required	59.0

Object Graph Input

Input representation of an sObject with a graph ID.

JSON example

```

{
  "graph": {

```

```

"graphId": "1",
"records": [
  {
    "referenceId": "refOrder",
    "record": {
      "attributes": {
        "type": "Order",
        "method": "POST"
      }
    }
  }
]
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
graphId	String	The ID of the graph.	Required	60.0
records	Object with Reference Input on page 978[]	List of the records to be ingested.	Required	60.0

Object Input Map

Input representation of an sObject record in a key-value map format.

JSON example

```

{
  "records": [
    {
      "referenceId": "refOrder",
      "record": {
        "attributes": {
          "type": "Order",
          "method": "PATCH",
          "id": "402xx000003KY5vJGH"
        },
        "Quantity": 5
      }
    }
  ]
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
attributes	Map <String, String>	<p>Configuration input for the record process. Valid values are:</p> <ul style="list-style-type: none"> • <code>type</code>—Type of sales transaction such as Quote or Order. • <code>method</code>—HTTP methods such as POST, PATCH, and DELETE. • <code>id</code>—Unique identifier for the record. Required for PATCH and DELETE operations. • <code>criteria</code>—Criteria to group order or quote line items. For example, group order or quote line items based on a monthly billing frequency. • <code>action</code>—Action to group order or quote line items. Valid values are: <ul style="list-style-type: none"> - GroupBy - Group - Ungroup - GroupAll - DeleteGroup 	Required	60.0

Object with Reference Input

Input representation of a list of records to be inserted or updated. To update a record, specify the record ID.

This is a sample request to create a sales transaction for an order line item.

JSON example

```
{
  "referenceId": "refOrderItem0",
  "record": {
    "attributes": {
      "type": "OrderItem",
      "method": "POST"
    },
    "OrderId": "@{refOrder.id}",
  },
}
```

```

    "OrderActionId": "@{refOrderAction.id}",
    "PricebookEntryId": "01uRM000000igZG",
    "Quantity": 2
  }
}

```

This is a sample request to update an order line item.

JSON example

```

{
  "referenceId": "refOrderItem0",
  "record": {
    "attributes": {
      "type": "OrderItem",
      "method": "PATCH",
      "id": "402xx000003KY5vJGH"
    },
    "OrderId": "@{refOrder.id}",
    "OrderActionId": "@{refOrderAction.id}",
    "PricebookEntryId": "01uRM000000igZG",
    "Quantity": 2,
    "UnitPrice": 800
  }
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
referenceId	String	Reference ID that maps to the response and can be used as a reference in later subrecords.	Required	60.0
records	Object Input Map on page 977	Details of a record to be ingested.	Required	60.0

Place Order Input

Input representation of the request to create or update an order.

JSON example

```

{
  "pricingPref": "System",
  "configurationInput": "RunAndAllowErrors",
  "configurationOptions": {
    "validateProductCatalog": true,
    "validateAmendRenewCancel": true,
    "executeConfigurationRules": true,
    "addDefaultConfiguration": true
  },
  "graph": {
    "graphId": "graphId",

```

```

"records": [
  {
    "referenceId": "refOrder",
    "record": {
      "attributes": {
        "type": "Order",
        "method": "POST",
        "Id": "POST"
      }
    }
  },
  {
    "referenceId": "refOrderItem",
    "record": {
      "attributes": {
        "type": "OrderItem",
        "method": "POST"
      },
      "OrderId": "@{refOrder.id}",
      "OrderActionId": "@{refOrderAction.id}",
      "ListPrice": "144.99",
      "Quantity": 3,
      "PricebookEntryId": "01luxx0000008yXPAAY",
      "Product2Id": "01ttxx0000006i2UAAQ",
      "UnitPrice": "199.49"
    }
  }
]
}

```

This example shows a sample request to define grouping of order items.

```

{
  "pricingPref": "system",
  "graph": {
    "graphId": "placeOrder",
    "records": [
      {
        "referenceId": "refOrder",
        "record": {
          "attributes": {
            "type": "Order",
            "method": "PATCH",
            "id": "801xx000003GZ9bAAG"
          }
        }
      },
      {
        "referenceId": "refOlg1",
        "record": {
          "attributes": {
            "type": "OrderItemGroup",
            "method": "POST"
          },
        }
      }
    ]
  }
}

```



```

        "Name": "New Group",
        "OrderId": "@{refOrder.id}"
      }
    ]
  }
}

```

This example shows a sample request to ungroup order items.

```

{
  "pricingPref": "system",
  "graph": {
    "graphId": "placeOrder",
    "records": [
      {
        "referenceId": "refOrder",
        "record": {
          "attributes": {
            "type": "Order",
            "method": "PATCH",
            "id": "refOrder"
          }
        }
      },
      {
        "referenceId": "refOlgl",
        "record": {
          "attributes": {
            "type": "OrderItemGroup",
            "method": "DELETE",
            "id": "refOlgl",
            "action": "Ungroup"
          }
        }
      }
    ]
  }
}

```

This example shows a sample request to create a new group.

```

{
  "pricingPref": "system",
  "graph": {
    "graphId": "placeOrder",
    "records": [
      {
        "referenceId": "refOrder",
        "record": {
          "attributes": {
            "type": "Order",
            "method": "PATCH",
            "id": "refOrder"
          }
        }
      }
    ]
  }
}

```

```

        }
      },
      {
        "referenceId": "refOlg",
        "record": {
          "attributes": {
            "type": "OrderItemGroup",
            "method": "POST"
          },
          "Name": "New Group",
          "OrderId": "@{refOrder.id}"
        }
      }
    ]
  }
}

```

This example shows a sample request to delete a group.

```

{
  "contextId": "",
  "correlationId": "",
  "records": [
    {
      "referenceId": "refOrder",
      "record": {
        "attributes": {
          "type": "Order",
          "method": "PATCH",
          "id": "refOrder"
        }
      }
    },
    {
      "referenceId": "refOlg",
      "record": {
        "attributes": {
          "type": "OrderItemGroup",
          "method": "DELETE",
          "id": "refOlg",
          "action": "DeleteGroup"
        }
      }
    }
  ]
}

```

This example shows a sample request to group order items based on criteria.

```

{
  "pricingPref": "system",
  "graph": {
    "graphId": "placeOrder",
    "records": [
      {

```

```

    "referenceId": "refOrder",
    "record": {
      "attributes": {
        "type": "Order",
        "method": "PATCH",
        "id": "refOrder"
      }
    }
  },
  {
    "referenceId": "g0",
    "record": {
      "attributes": {
        "type": "OrderItemGroup",
        "method": "POST",
        "action": "GroupBy",
        "criteria": {
          "BillingFrequency2": null
        }
      },
      "Name": "Billing Frequency: ",
      "OrderId": "@{refOrder.id}"
    }
  },
  {
    "referenceId": "g1",
    "record": {
      "attributes": {
        "type": "OrderItemGroup",
        "method": "POST",
        "action": "GroupBy",
        "criteria": {
          "BillingFrequency2": "Monthly"
        }
      },
      "Name": "Billing Frequency: Monthly",
      "OrderId": "@{refOrder.id}"
    }
  }
]
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
catalog RatesPref	String	Rate card entries defined in the catalog that must be fetched for order items with usage-based pricing during the order creation process. Valid values are: <ul style="list-style-type: none"> Fetch—Retrieves the rate card entries defined in the catalog for order 	Optional	62.0

Name	Type	Description	Required or Optional	Available Version
		<p>items during the order creation process.</p> <ul style="list-style-type: none"> • <code>Skip</code>—Skips the retrieval of rate card entries for order items during the order creation process. <p>The default value is <code>Skip</code>.</p> <p>This property is available when the Usage-Based Selling feature is enabled.</p>		
<code>configurationInput</code>	String	<p>Configuration input for the place order process. Valid values are:</p> <ul style="list-style-type: none"> • <code>RunAndAllowErrors</code>—Specifies to run the configuration and to proceed order ingestion upon encountering any configuration errors. • <code>RunAndBlockErrors</code>—Specifies to run configuration and to block order ingestion upon encountering any configuration errors. • <code>Skip</code>—Specifies to skip configuration. <p>The default value is <code>RunAndBlockErrors</code>.</p>	Optional	60.0
<code>configurationOptions</code>	Configuration Options Input[]	Configuration options during the ingestion process.	Optional	60.0
<code>graph</code>	Object Graph Input	The sObject graph of the order payload to be ingested. You can perform create, update, or delete operations on objects from the Sales Transaction context definition by using this property. Additionally, perform create, update, or delete operations on custom objects and fields in your extended context definition.	Required	60.0
<code>pricingPref</code>	String	<p>Pricing preference during the create order process. Valid values are:</p> <ul style="list-style-type: none"> • <code>Force</code>—Specifies to force pricing during the order ingestion process. • <code>Skip</code>—Specifies to skip pricing during the order ingestion process. 	Optional	60.0

Name	Type	Description	Required or Optional	Available Version
		<ul style="list-style-type: none"> <code>System</code>—Specifies the system to determine whether a pricing calculation is required. <p>The default value is <code>System</code>.</p>		

Preview Approval Input

Input representation of the details of the request to preview an approval.

JSON example

```
{
  "flowApiName": "QuoteApprovals",
  "objectApiName": "Quote",
  "recordId": "0Q0DU0000005HZC0A2"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
<code>flowApiName</code>	String	API name of the auto-launched flow.	Required	65.0
<code>objectApiName</code>	String	API name of the object to preview the approvals for.	Required	65.0
<code>recordId</code>	String	ID of the record to preview the approvals for.	Required	65.0

Place Quote Input

Input representation of the request to create or update a quote.

JSON example

This example shows a sample request to create a quote.

```
{
  "pricingPref": "System",
  "configurationInput": "RunAndAllowErrors",
  "configurationOptions": {
    "validateProductCatalog": true,
    "validateAmendRenewCancel": true,
    "executeConfigurationRules": true,
    "addDefaultConfiguration": true
  },
  "graph": {
    "graphId": "createQuote",
    "records": [{
      "referenceId": "refQuote",
      "record": {
```

```

    "attributes": {
      "type": "Quote",
      "method": "POST"
    },
    "opportunityId": "---",
    "quoteProp1": "value1",
    "quoteProp2": "value2"
  }
},
{
  "referenceId": "refQuoteLineItem1",
  "record": {
    "attributes": {
      "type": "QuoteLineItem",
      "method": "POST"
    },
    "QuoteLineItemProp1": "value1",
    "QuoteLineItemProp2": "value2"
  }
},
{
  "referenceId": "refQuoteLineItemAttribute",
  "record": {
    "attributes": {
      "type": "QuoteLineItemAttribute",
      "method": "POST"
    },
    "QuoteLineItemId": "@{refQuoteLineItem1.id}",
    "AttributeDefinitionId": "0tjxx000000001AAA"
  }
}
]
}
}

```

This example shows a sample request to insert, update, or delete a quote line item.

```

{
  "pricingPref": "System",
  "configurationInput": "skip",
  "graph": {
    "graphId": "updateQuote",
    "records": [
      {
        "referenceId": "refQuote",
        "record": {
          "attributes": {
            "type": "Quote",
            "method": "PATCH",
            "id": "0Q0xx0000004E2mCAE"
          },
          "Name": "Quote_Acme"
        }
      },
      {

```

```

    "referenceId": "refQuoteLineItemToCreate1",
    "record": {
      "attributes": {
        "type": "QuoteLineItem",
        "method": "POST"
      },
      "QuoteId": "0Q0xx0000004E2mCAE",
      "PricebookEntryId": "01luxx0000008yXPAAY",
      "Product2Id": "01txx0000006i2UAAQ",
      "Quantity": 2.0,
      "UnitPrice": 800.0,
      "PeriodBoundary": "Anniversary",
      "BillingFrequency": "Monthly",
      "StartDate": "2024-03-11"
    }
  },
  {
    "referenceId": "refQuoteLineItemToPatch2",
    "record": {
      "attributes": {
        "type": "QuoteLineItem",
        "method": "PATCH",
        "id": "0Q0xx0000004E2mCAE"
      },
      "Quantity": 2.0,
      "UnitPrice": 600.0
    }
  },
  {
    "referenceId": "refQuoteLineItemToDelete3",
    "record": {
      "attributes": {
        "type": "QuoteLineItem",
        "method": "DELETE",
        "id": "0Q0xx0000004E2mYLK"
      }
    }
  }
]
}
}

```

This example shows a sample request to define grouping of quote line items.

```

{
  "pricingPref": "Force",
  "configurationInput": "skip",
  "graph": {
    "graphId": "groupLines",
    "records": [
      {
        "referenceId": "refQuote",
        "record": {
          "attributes": {
            "type": "Quote",

```

```

        "method": "PATCH",
        "id": "0Q0xx0000004C99CAE"
    },
    "Name": "From Place Quote API"
}
},
{
    "referenceId": "refQlg1",
    "record": {
        "attributes": {
            "type": "QuoteLineGroup",
            "method": "POST",
            "action": "GroupBy",
            "criteria": {
                "Quantity": 1
            }
        },
        "Name": "From Place Quote API Group",
        "QuoteId": "@{refQuote.id}"
    }
},
{
    "referenceId": "refQuoteItem1",
    "record": {
        "attributes": {
            "type": "QuoteLineItem",
            "method": "PATCH",
            "id": "0QLxx0000004DJcGAM"
        },
        "QuoteLineGroupId": "@{refQlg1.id}",
        "Quantity": 1
    }
}
]
}
}

```

This example shows a sample request for the initial grouping of the quote with the quote lines assigned to the first group.

```

{
    "pricingPref": "Force",
    "graph": {
        "graphId": "test",
        "records": [
            {
                "referenceId": "refQuote",
                "record": {
                    "attributes": {
                        "type": "Quote",
                        "method": "PATCH",
                        "id": "0Q0xx0000004CAmCAM"
                    }
                }
            }
        ],
    }
}

```



```

    "referenceId": "refQlg1",
    "record": {
      "attributes": {
        "type": "QuoteLineGroup",
        "method": "POST",
        "action": "GroupAll"
      },
      "Name": "From PQ API Group",
      "QuoteId": "@{refQuote.id}"
    }
  ]
}

```

This example shows a sample request to ungroup a quote but retain the quote lines.

```

{
  "pricingPref": "Force",
  "configurationInput": "skip",
  "graph": {
    "graphId": "test",
    "records": [
      {
        "referenceId": "refQuote",
        "record": {
          "attributes": {
            "type": "Quote",
            "method": "PATCH",
            "id": "0Q0xx0000004C99CAE"
          },
          "Name": "From Place Quote API"
        }
      },
      {
        "referenceId": "refQlg1",
        "record": {
          "attributes": {
            "type": "QuoteLineGroup",
            "method": "DELETE",
            "id": "{GroupId}",
            "action": "Ungroup"
          }
        }
      }
    ]
  }
}

```

This example shows a sample request to create a new group.

```

{
  "pricingPref": "Force",
  "configurationInput": "skip",
  "graph": {

```

```

"graphId": "test",
"records": [
  {
    "referenceId": "refQuote",
    "record": {
      "attributes": {
        "type": "Quote",
        "method": "PATCH",
        "id": "0Q0xx0000004C99CAE"
      },
      "Name": "From Place Quote API"
    }
  },
  {
    "referenceId": "refQlg1",
    "record": {
      "attributes": {
        "type": "QuoteLineGroup",
        "method": "POST"
      },
      "Name": "From PQ API Group",
      "QuoteId": "@{refQuote.id}"
    }
  }
]
}

```

This example shows a sample request to delete a group.

```

{
  "pricingPref": "Force",
  "configurationInput": "skip",
  "graph": {
    "graphId": "test",
    "records": [
      {
        "referenceId": "refQuote",
        "record": {
          "attributes": {
            "type": "Quote",
            "method": "PATCH",
            "id": "0Q0xx0000004C99CAE"
          },
          "Name": "From Place Quote API"
        }
      },
      {
        "referenceId": "refQlg1",
        "record": {
          "attributes": {
            "type": "QuoteLineGroup",
            "method": "DELETE",
            "id": "{GroupId}",
            "action": "DeleteGroup"
          }
        }
      }
    ]
  }
}

```

```

    }
  }
]
}
}

```

This example shows a sample request to move a group.

```

{
  "pricingPref": "Force",
  "configurationInput": "skip",
  "graph": {
    "graphId": "test",
    "records": [
      {
        "referenceId": "refQuote",
        "record": {
          "attributes": {
            "type": "Quote",
            "method": "PATCH",
            "id": "0Q0xx0000004C99CAE"
          },
          "Name": "From PlaceQuote Api"
        }
      },
      {
        "referenceId": "0QLxx0000004CBYGA2",
        "record": {
          "attributes": {
            "type": "QuoteLineItem",
            "method": "PATCH",
            "id": "0QLxx0000004CBYGA2"
          },
          "Quantity": 2,
          "QuoteLineGroupId": "@{GroupId2}"
        }
      }
    ]
  }
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
catalog RatesPref	String	Rate card entries defined in the catalog that must be fetched for quote line items with usage-based pricing during the quote creation process. Valid values are: <ul style="list-style-type: none"> Fetch—Retrieves the rate card entries defined in the catalog for quote line items during the quote creation process. 	Optional	62.0

Name	Type	Description	Required or Optional	Available Version
		<ul style="list-style-type: none"> • <code>skip</code>—Skips the retrieval of rate card entries for quote line items during the quote creation process. <p>The default value is <code>skip</code>.</p> <p>This property is available when the Usage-Based Selling feature is enabled.</p>		
<code>configurationInput</code>	String	<p>Configuration input for the place quote process. Valid values are:</p> <ul style="list-style-type: none"> • <code>RunAndAllowErrors</code> • <code>RunAndBlockErrors</code> • <code>skip</code> <p>The default value is <code>RunAndBlockErrors</code>.</p>	Optional	60.0
<code>configurationOptions</code>	Configuration Options Input	Configuration options during the ingestion process.	Optional	60.0
<code>graph</code>	Object Graph Input	The sObject graph representing the quote structure. You can perform create, update, or delete operations on objects from the Sales Transaction context definition by using this property. Additionally, perform create, update, or delete operations on custom objects and fields in your extended context definition.	Required	60.0
<code>pricingPref</code>	String	<p>Pricing preference during the quote process. Valid values are:</p> <ul style="list-style-type: none"> • <code>Force</code> • <code>skip</code> • <code>System</code> <p>The default value is <code>System</code>.</p>	Optional	60.0

Read Sales Transaction Input

Input representation of the filter criteria details to read a sales transaction.

JSON example

```
{
  "contextId": "008d27d7-e004-4906-a949-ee7d7c323c77",
  "queryTags": [
    "Quote",
    "QuoteLineItem",
  ]
}
```

```

    "Product"
  ]
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
contextId	String	ID of the context to retrieve the data records.	Required	65.0
queryTags	List<String>	List of objects that must be retrieved from the context.	Optional	65.0

Renewal Input

Input representation of the details of the request to initiate the renewal of an asset.

JSON example

```

{
  "assetIds": [
    "02iSG0000003NMhYAM",
    "02iSG0000006DvSYAU"
  ],
  "contractId": "800SG00000CFpepYAD",
  "opportunityId": "006SG000004W5tVYAS",
  "outputRecordId": "801SG00000DX1jWYAT",
  "outputRecordType": "Quote",
  "renewalEndDate": "2024-10-03T23:59:59",
  "renewalStartDate": "2023-10-04T00:00:00"
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
assetIds	String[]	IDs of the assets that you want to renew.	Required	62.0
contractId	String	ID of the Contract record that you want to sync with the renewal of the Quote or Order record.	Optional	62.0
opportunityId	String	ID of the Opportunity record that you want to sync with the renewal quote.	Optional	62.0
outputRecordId	String	ID of the Quote or Order record that you want to renew.	Optional	62.0
outputRecordType	String	Type of renewal record that you want to create.	Required	62.0

Name	Type	Description	Required or Optional	Available Version
renewal EndDate	String	End date of the renewal process for the assets.	Optional	62.0
renewal StartDate	String	Start date of the renewal process for the assets. Required for early asset renewals and renewing expired assets, using today's date or a future date.	Optional	62.0

Sales Transaction Input

Input representation of the details of the request to place a sales transaction, such as a quote or an order.

JSON example

This is a sample request to create a sales transaction for a quote. This example also skips tax calculation by specifying a value for the optional `taxPref` property.

```
{
  "pricingPref": "System",
  "catalogRatesPref": "Skip",
  "configurationPref": {
    "configurationMethod": "Skip",
    "configurationOptions": {
      "validateProductCatalog": true,
      "validateAmendRenewCancel": true,
      "executeConfigurationRules": true,
      "addDefaultConfiguration": true
    }
  },
  "taxPref": "Skip",
  "contextDetails": {
    "contextId": "e055bb18-d4e8-41c3-881e-0132b9561708"
  },
  "graph": {
    "graphId": "createQuote",
    "records": [
      {
        "referenceId": "refQuote",
        "record": {
          "attributes": {
            "method": "POST",
            "type": "Quote"
          },
          "Name": "Quote_Acme",
          "Pricebook2Id": "01sDU000000JvhbYAC"
        }
      },
      {
        "referenceId": "refQuoteLine0",
        "record": {
          "attributes": {
```

```

        "type": "QuoteLineItem",
        "method": "POST"
    },
    "QuoteId": "@{refQuote.id}",
    "Product2Id": "01tDU000000F7b8YAC",
    "PricebookEntryId": "01uDU000000fxt2YAA",
    "UnitPrice": 100,
    "Quantity": "1",
    "StartDate": "2024-10-29",
    "EndDate": "2025-03-01",
    "PeriodBoundary": "Anniversary"
}
}
]
}
}

```

This sample request assigns a TransactionProcessingType record to a quote without any additional preferences. In this example, the TransactionType value for a record is set to a TransactionProcessingType record. See [TransactionProcessingType](#) on page 899 tooling object for more details.

```

{
  "pricingPref": "Force",
  "contextDetails": {
    "contextId": "f1c9e3e1c335f7959a88de09d3a867cc2b95e08709b99de8e2edeb8f5039e8ed",
    "scope": "Session"
  },
  "graph": {
    "graphId": "updateQuote",
    "records": [
      {
        "referenceId": "refQuote",
        "record": {
          "attributes": {
            "type": "Quote",
            "method": "POST"
          },
          "OpportunityId": "006xx000001a2oWAAQ",
          "PriceBook2Id": "01sxx0000005ptpAAA",
          "TransactionType": "SkipPricingAndRunTax",
          "Name": "Quote_No_Tax_System"
        }
      },
      {
        "referenceId": "refQLI1",
        "record": {
          "attributes": {
            "type": "QuoteLineItem",
            "method": "POST"
          },
          "QuoteId": "@{refQuote.id}",
          "UnitPrice": 49.99,
          "Product2Id": "01txx0000006i2aAAA",
          "PricebookEntryId": "01luxx0000008yX0AAI",
          "Quantity": 10
        }
      }
    ]
  }
}

```

```

    }
  }
]
}
}

```

This is a sample request to insert, update, or delete a quote line item.

```

{
  {
    "pricingPref": "System",
    "catalogRatesPref": "Skip",
    "configurationPref": {
      "configurationMethod": "Skip",
      "configurationOptions": {
        "validateProductCatalog": true,
        "validateAmendRenewCancel": true,
        "executeConfigurationRules": true,
        "addDefaultConfiguration": true
      }
    },
    "contextDetails": {
      "contextId": "e055bb18-d4e8-41c3-881e-0132b9561708"
    },
    "graph": {
      "graphId": "updateQuote",
      "records": [
        {
          "referenceId": "refQuote",
          "record": {
            "attributes": {
              "method": "PATCH",
              "type": "Quote",
              "id": "801xx000003GZ9bAAG"
            }
          }
        },
        {
          "referenceId": "refQuoteLine0",
          "record": {
            "attributes": {
              "type": "QuoteLineItem",
              "method": "PATCH",
              "id": "402xx000003KY5vJGH"
            },
            "Quantity": "5"
          }
        }
      ]
    }
  }
}

```


This is a sample request to define grouping of quote line items.

```
{
  "pricingPref": "Force",
  "catalogRatesPref": "Skip",
  "configurationPref": {
    "configurationMethod": "Skip",
    "configurationOptions": {
      "validateProductCatalog": true,
      "validateAmendRenewCancel": true,
      "executeConfigurationRules": true,
      "addDefaultConfiguration": true
    }
  },
  "contextDetails": {
    "contextId": "e055bb18-d4e8-41c3-881e-0132b9561708"
  },
  "graph": {
    "graphId": "groupQuoteLines",
    "records": [
      {
        "referenceId": "refQuote",
        "record": {
          "attributes": {
            "method": "PATCH",
            "type": "Quote",
            "id": "801xx000003GZ9bAAG"
          }
        }
      },
      {
        "referenceId": "refQuoteLine0",
        "record": {
          "attributes": {
            "type": "QuoteLineItem",
            "method": "PATCH",
            "id": "402xx000003KY5vJGH"
          },
          "QuoteLineGroupId": "@{refQuote.id}"
        }
      }
    ]
  }
}
```

This is a sample request for the initial grouping of the quote with all the quote lines assigned to the first group.

```
{
  "pricingPref": "Force",
  "catalogRatesPref": "Skip",
  "graph": {
    "graphId": "groupQuote",
    "records": [
      {
        "referenceId": "refQuote",
```

```

    "record": {
      "attributes": {
        "type": "Quote",
        "method": "PATCH",
        "id": "0Q0xx0000004CAmCAM"
      }
    },
    {
      "referenceId": "refQlg1",
      "record": {
        "attributes": {
          "type": "QuoteLineGroup",
          "method": "POST",
          "action": "GroupAll"
        },
        "Name": "From PST API Group",
        "QuoteId": "@{refQuote.id}"
      }
    }
  ]
}

```

This is a sample request to ungroup a quote but retain the quote lines.

```

{
  "catalogRatesPref": "Skip",
  "pricingPref": "Force",
  "graph": {
    "graphId": "ungroupQuote",
    "records": [
      {
        "referenceId": "refQuote",
        "record": {
          "attributes": {
            "type": "Quote",
            "method": "PATCH",
            "id": "0Q0xx0000004C99CAE"
          },
          "Name": "Grouped Quote with PST API"
        }
      },
      {
        "referenceId": "refQlg1",
        "record": {
          "attributes": {
            "type": "QuoteLineGroup",
            "method": "DELETE",
            "id": "402xx000003KY5vJGH",
            "action": "Ungroup"
          }
        }
      }
    ]
  }
}

```

```

}
}

```

This is a sample request to create a new group.

```

{
  "catalogRatesPref": "Skip",
  "pricingPref": "Force",
  "graph": {
    "graphId": "createGroup",
    "records": [
      {
        "referenceId": "refQuote",
        "record": {
          "attributes": {
            "type": "Quote",
            "method": "PATCH",
            "id": "0Q0xx0000004C99CAE"
          },
          "Name": "Grouped Quote with PST API"
        }
      },
      {
        "referenceId": "refQlgl",
        "record": {
          "attributes": {
            "type": "QuoteLineGroup",
            "method": "POST"
          },
          "Name": "From PQ API Group",
          "QuoteId": "@{refQuote.id}"
        }
      }
    ]
  }
}

```

This example shows a sample request to delete a group.

```

{
  "catalogRatesPref": "Skip",
  "pricingPref": "Force",
  "graph": {
    "graphId": "deleteGroup",
    "records": [
      {
        "referenceId": "refQuote",
        "record": {
          "attributes": {
            "type": "Quote",
            "method": "PATCH",
            "id": "0Q0xx0000004C99CAE"
          },
          "Name": "Grouped Quote with PST API"
        }
      }
    ]
  }
}

```

```

    },
    {
      "referenceId": "refQlg1",
      "record": {
        "attributes": {
          "type": "QuoteLineGroup",
          "method": "DELETE",
          "id": "402xx000003KY5vJGH",
          "action": "DeleteGroup"
        }
      }
    }
  ]
}

```

This is a sample request to group order items based on criteria.

```

{
  "catalogRatesPref": "Skip",
  "pricingPref": "Force",
  "graph": {
    "graphId": "groupOrderItems",
    "records": [
      {
        "referenceId": "refOrder",
        "record": {
          "attributes": {
            "type": "Order",
            "method": "PATCH",
            "id": "0Q0xx0000004C99CAE"
          }
        }
      },
      {
        "referenceId": "refOlg1",
        "record": {
          "attributes": {
            "type": "OrderItemGroup",
            "method": "POST",
            "action": "GroupBy",
            "criteria": {
              "BillingFrequency2": null
            }
          },
          "Name": "Billing Frequency: ",
          "OrderId": "@{refOrder.id}"
        }
      },
      {
        "referenceId": "g1",
        "record": {
          "attributes": {
            "type": "OrderItemGroup",
            "method": "POST",

```

```

        "action": "GroupBy",
        "criteria": {
            "BillingFrequency2": "Monthly"
        }
    },
    "Name": "Billing Frequency: Monthly",
    "OrderId": "@{refOrder.id}"
}
]
}
}

```

This is a sample request to save changes to a ramp deal by using context ID. The context ID is returned by the Ramp Deal APIs. See [Create Ramp Deal \(POST\)](#).

```

{
  "pricingPref": "Force",
  "contextDetails": {
    "contextId": "f1c9e3e1c335f7959a88de09d3a867cc2b95e08709b99de8e2edeb8f5039e8ed",
    "scope": "Session"
  },
  "graph": {
    "graphId": "updateQuote",
    "records": [
      {
        "referenceId": "refQuote",
        "record": {
          "attributes": {
            "type": "Quote",
            "method": "PATCH",
            "id": "0Q0xx0000004DQ4CAM"
          }
        }
      }
    ]
  }
}

```

To see examples that specify actions to create ramp deals for groups, see [Group Ramp Action Input](#) on page 1003.

Properties

Name	Type	Description	Required or Optional	Available Version
catalogRates Pref	String	Rate card entries defined in the catalog that must be fetched for sales items with usage-based pricing during the creation of the sales transaction. Valid values are: <ul style="list-style-type: none"> Fetch—Retrieves the rate card entries defined in the catalog for sales items during the creation of the sales transaction. 	Optional	63.0

Name	Type	Description	Required or Optional	Available Version
		<ul style="list-style-type: none"> <code>skip</code>—Skips the retrieval of rate card entries for sales items during the creation of the sales transaction. <p>The default value is <code>skip</code>.</p> <p>This property is available when the Usage-Based Selling feature is enabled.</p>		
<code>configurationPref</code>	Configurator Preference Input	Configuration preference during the quote process. These preferences ensure that quotes are defined as per the requirement.	Optional	63.0
<code>contextDetails</code>	Context Input	Context details that are created for a sales transaction.	Required if the <code>graph</code> property isn't specified.	63.0
<code>graph</code>	Object Graph Input	<p>The <code>sObject</code> graph of the sales transaction to be ingested. You can perform create, update, or delete operations on objects from the Sales Transaction context definition by using this property.</p> <p>Additionally, perform create, update, or delete operations on custom objects and fields in your extended context definition.</p> <p>To create custom objects that are at the grandchildren level from a line item, you must create the hierarchy of objects until the grandchild object in the same request.</p>	Required if the <code>contextDetails</code> property isn't specified.	63.0
<code>groupRampAction</code>	String	<p>Specifies the action that you want to perform on group ramp segments. Additionally, you can also convert a non-ramped group into a ramped group. Valid values are:</p> <ul style="list-style-type: none"> <code>AddProducts</code>—Specifies to add rampable products to group ramp segments. <code>DeleteProducts</code>—Specifies to delete ramped products. <code>EditGroup</code>—Specifies to convert a non-ramped group into a group ramp segment, or edit group ramp segment attributes such as name and description, except the start and end dates. 	Optional	65.0

Name	Type	Description	Required or Optional	Available Version
		<ul style="list-style-type: none"> <code>EditRampSchedule</code>—Specifies to edit details of the group ramp segments, including start and end dates. <code>DeleteSegment</code>—Specifies to delete the first or last segment in a group ramp schedule. <code>ConvertToNonRampedGroup</code>—Specifies to convert the first or last group ramp segment into a non-ramped group. <p>To add or delete ramped line items from multiple group ramp segments, pass all the applicable values in the <code>graph</code> property. See Group Ramp Action Input on page 1003 to refer to examples.</p>		
<code>pricingPref</code>	String	<p>Pricing preference during the creation of a sales transaction. Valid values are:</p> <ul style="list-style-type: none"> <code>Force</code>—Specifies to enforce pricing during the creation of sales transactions. <code>Skip</code>—Specifies to skip pricing during the creation of sales transactions. <code>System</code>—Specifies the system to determine whether a pricing calculation is required. <p>The default value is <code>System</code>.</p>	Optional	63.0
<code>taxPref</code>	String	<p>Specifies whether to execute or skip the tax calculation step for each sales transaction record. Valid value is <code>Skip</code>. If this value isn't specified, then tax calculation request is performed by default.</p>	Optional	65.0

[Group Ramp Action Input](#)

Understand the sample request to specify group ramp actions during initial sale.

Group Ramp Action Input

Understand the sample request to specify group ramp actions during initial sale.

Keep these considerations in mind when you specify ramp actions.

- Use the [Clone Sales Transaction API](#) to clone a ramp segment, and specify the clone option.

- Use the [Place Sales Transaction API](#) to specify a group ramp action by using the `groupRampAction` property. You can refer to the sections in this topic for examples.

JSON example to edit a group

This is a sample request that creates the first ramp segment. This request accepts IDs of a quote and quote line group. Additionally, the request accepts attributes of quote line group such as `IsRamped`, `SegmentType`, `StartDate`, and `EndDate`. A ramp segment is created with a ramp identifier and segment identifier added to all the quote line items available in the ramp segment.

This process converts a group into a segment, which becomes the first segment in the ramp schedule. A quote can contain a single ramp schedule only. To create another segment in the ramp schedule, use the [Clone Sales Transaction API](#).

```
{
  "groupRampAction": "EditGroup",
  "pricingPref": "System",
  "graph": {
    "graphId": "updateQuote",
    "records": [
      {
        "referenceId": "0Q0xx0000004CYqCAM",
        "record": {
          "attributes": {
            "type": "Quote",
            "method": "PATCH",
            "id": "0Q0xx0000004CYqCAM"
          }
        }
      },
      {
        "referenceId": "1C9xx0000004CVcCAM",
        "record": {
          "attributes": {
            "type": "QuoteLineGroup",
            "method": "PATCH",
            "id": "1C9xx0000004CVcCAM"
          },
          "StartDate": "2025-05-01",
          "EndDate": "2025-06-30",
          "SortOrder": 1,
          "IsRamped": true,
          "SegmentType": "Custom"
        }
      }
    ]
  }
}
```

JSON example to edit a ramp segment

This is a sample request to edit multiple ramp segments simultaneously, maintaining date continuity among ramp segments.

```
{
  "groupRampAction": "EditRampSchedule",
  "pricingPref": "System",
  "graph": {
    "graphId": "updateQuote",
    "records": [
```



```
{
  "referenceId": "0Q0xx0000004CYqCAM",
  "record": {
    "attributes": {
      "type": "Quote",
      "method": "PATCH",
      "id": "0Q0xx0000004CYqCAM"
    }
  }
},
{
  "referenceId": "1C9xx0000004CVcCAM",
  "record": {
    "attributes": {
      "type": "QuoteLineGroup",
      "method": "PATCH",
      "id": "1C9xx0000004CVcCAM"
    },
    "StartDate": "2025-05-01",
    "EndDate": "2025-06-30"
  }
},
{
  "referenceId": "1C9xx0000004CVcAAM",
  "record": {
    "attributes": {
      "type": "QuoteLineGroup",
      "method": "PATCH",
      "id": "1C9xx0000004CVcAAM"
    },
    "StartDate": "2025-07-01",
    "EndDate": "2025-08-30"
  }
},
{
  "referenceId": "1C9xx0000004CVcBAM",
  "record": {
    "attributes": {
      "type": "QuoteLineGroup",
      "method": "PATCH",
      "id": "1C9xx0000004CVcBAM"
    },
    "StartDate": "2025-09-01",
    "EndDate": "2025-10-30"
  }
}
]
}
```

JSON example to add a product

This is a sample request to add a product to the current and subsequent segments. A ramp identifier and segment identifier are added to the quote line items.

```
{
  "groupRampAction": "AddProducts",
  "pricingPref": "System",
  "graph": {
    "graphId": "updateQuote",
    "records": [
      {
        "referenceId": "0Q0xx0000004CKKCA2",
        "record": {
          "attributes": {
            "type": "Quote",
            "method": "PATCH",
            "id": "0Q0xx0000004CKKCA2"
          }
        }
      },
      {
        "referenceId": "1C9xx0000004CCGCA2",
        "record": {
          "attributes": {
            "type": "QuoteLineGroup",
            "method": "PATCH",
            "id": "1C9xx0000004CCGCA2"
          }
        }
      },
      {
        "referenceId": "ref_01txx0000006iCXAAAY_0",
        "record": {
          "attributes": {
            "type": "QuoteLineItem",
            "method": "POST",
            "id": "ref_01txx0000006iCXAAAY_0"
          },
          "QuoteId": "@{0Q0xx0000004CKKCA2.id}",
          "Id": "ref_01txx0000006iCXAAAY_0",
          "UnitPrice": 2000,
          "Product2Id": "01txx0000006iCXAAAY",
          "PricebookEntryId": "01luxx0000008yciAAA",
          "Quantity": 1,
          "StartDate": "2025-05-28T00:00:00.000Z",
          "BillingFrequency": null,
          "PeriodBoundary": null,
          "QuoteLineGroupId": "1C9xx0000004CCGCA2"
        }
      },
      {
        "referenceId": "1C9xx0000004CCGCAB",
        "record": {
          "attributes": {
```

```

        "type": "QuoteLineGroup",
        "method": "PATCH",
        "id": "1C9xx0000004CCGCAB"
    }
}
},
{
  "referenceId": "ref_01txx0000006iCXABY_0",
  "record": {
    "attributes": {
      "type": "QuoteLineItem",
      "method": "POST",
      "id": "ref_01txx0000006iCXABY_0"
    },
    "QuoteId": "@{0Q0xx0000004CKKCA2.id}",
    "Id": "ref_01txx0000006iCXAAAY_0",
    "UnitPrice": 2000,
    "Product2Id": "01txx0000006iCXAAAY",
    "PricebookEntryId": "01luxx0000008yciAAA",
    "Quantity": 1,
    "StartDate": "2025-05-28T00:00:00.000Z",
    "BillingFrequency": null,
    "PeriodBoundary": null,
    "QuoteLineGroupId": "1C9xx0000004CCGCAB"
  }
}
]
}
}

```

JSON example to delete a product

This is a sample request to delete a product from the current and subsequent ramp segments.

```

{
  "pricingPref": "System",
  "groupRampAction": "DeleteProducts",
  "graph": {
    "graphId": "updateQuote",
    "records": [
      {
        "referenceId": "0Q0SG000000L5r70AC",
        "record": {
          "attributes": {
            "type": "Quote",
            "method": "PATCH",
            "id": "0Q0SG000000L5r70AC"
          }
        }
      }
    ],
    {
      "referenceId": "0QLSG000000WuTh4AK",
      "record": {
        "attributes": {
          "type": "QuoteLineItem",
          "method": "DELETE",

```

```

        "id": "0QLSG000000WuTh4AK"
      }
    },
    {
      "referenceId": "0QLSG000000WuTh4BK",
      "record": {
        "attributes": {
          "type": "QuoteLineItem",
          "method": "DELETE",
          "id": "0QLSG000000WuTh4AK"
        }
      }
    }
  ]
}

```

JSON example to delete a segment

This is a sample request to delete the first and last segment in a ramp schedule. The API throws an error if the specified segment isn't the first and last segment, ensuring there are no gaps between quote line items in different ramp segments.

```

{
  "pricingPref": "System",
  "groupRampAction": "DeleteSegment",
  "graph": {
    "graphId": "updateQuote",
    "records": [
      {
        "referenceId": "0Q0xx0000004CfICAU",
        "record": {
          "attributes": {
            "type": "Quote",
            "method": "PATCH",
            "id": "0Q0xx0000004CfICAU"
          }
        }
      },
      {
        "referenceId": "1C9xx0000004FjcCAE",
        "record": {
          "attributes": {
            "type": "QuoteLineGroup",
            "method": "DELETE",
            "id": "1C9xx0000004FjcCAE",
            "action": "DeleteGroup"
          }
        }
      }
    ]
  }
}

```

JSON example to remove a segment from a ramp schedule

This is a sample request to remove the first or last ramp segment in a ramp schedule. This request removes the ramp-specific fields from a quote line group such as `IsRamped` and `SegmentType`. Additionally, this request removes the `RampIdentifier` and `SegmentIdentifier` fields from a quote line item.

```
{
  "pricingPref": "System",
  "groupRampAction": "ConvertToNonRampedGroup",
  "graph": {
    "graphId": "updateQuote",
    "records": [
      {
        "referenceId": "0Q0xx0000004CfICAU",
        "record": {
          "attributes": {
            "type": "Quote",
            "method": "PATCH",
            "id": "0Q0xx0000004CfICAU"
          }
        }
      },
      {
        "referenceId": "1C9xx0000004FjcCAE",
        "record": {
          "attributes": {
            "type": "QuoteLineGroup",
            "method": "PATCH",
            "id": "1C9xx0000004FjcCAE"
          }
        }
      }
    ]
  }
}
```

Supplemental Transaction Input

Input representation of the details of the request to create a supplemental order.

JSON example

This sample creates a supplemental order, which is a clone of the original order. The supplemental order is related to the original order.

```
{
  "relatedSalesTransactionId": "801S70000001VKgIAM"
}
```

This sample overrides a field value of an order line item to supplement the order item with ID value as 802SG000003vZ15YAE.

```
{
  "relatedSalesTransactionId": "801S70000001VKgIAM",
  "pricingPref": "System",
  "supplementalGraph": {
    "graphId": "1",

```

```

    "records": [
      {
        "referenceId": "refOrder",
        "record": {
          "attributes": {
            "type": "Order",
            "method": "PATCH",
            "id": "801S70000001VKgIAM"
          },
          "EffectiveDate": "2025-03-01",
          "QuoteId": "0Q0xx0000004DQ4CAM"
        }
      },
      {
        "referenceId": "refOrderItem",
        "record": {
          "attributes": {
            "type": "OrderItem",
            "method": "PATCH",
            "id": "802SG0000003vZ15YAE"
          },
          "QuoteLineItemId": "0Q0xx0000004E2mYLK"
        }
      }
    ]
  }
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
pricingPref	String	<p>Pricing preference for this supplemental transaction or order ingestion process. Valid values are:</p> <ul style="list-style-type: none"> • Force—Specifies to enforce pricing during the creation of sales transactions. • Skip—Specifies to skip pricing during the creation of sales transactions. • System—Specifies the system to determine whether a pricing calculation is required. <p>If pricingPref value is defined as either Force or System, the supplemental order can have a different pricing from the original order.</p>	Optional	64.0

Name	Type	Description	Required or Optional	Available Version
relatedSales TransactionId	String	Related or the original sales transaction upon which a supplemental transaction is created.	Required	64.0
supplemental Graph	Object Graph Input	The sObject graph that represents a payload with the additional changes to be ingested. The attribute's HTTP method must be PATCH. The attribute ID must be the ID of the original order or order item that you want to supplement.	Optional	64.0

Update Ramp Deal Input

Input representation of the request to update a ramp deal.

JSON example

```
{
  "executionSettings": {
    "executePricing": true,
    "executeConfigRules": false
  },
  "addedNodes": [
    {
      "contextNodePath": [
        "4f23961a5c98806f89305e064c67b397e93f1bb8a2a7a3a80db506f1d4110ee9", // Context
        ID
        "0Q0xx0000004CPACA2", //Quote or Order ID
        "RandomUUID" // random UUID for Quote Line Item or Order Item ID
      ],
      "contextNode": {
        "Discount": 10,
        "Quantity": 5,
        "ItemSegmentName": "Year 5",
        "StartDate": "2024-09-07T00:00:00.000Z",
        "EndDate": "2024-09-07T00:00:00.000Z"
      }
    }
  ],
  "updatedNodes": [
    {
      "contextNodePath": [
        "4f23961a5c98806f89305e064c67b397e93f1bb8a2a7a3a80db506f1d4110ee9", // Context
        ID
        "0Q0xx0000004CPACA2", //Quote or Order ID
        "0QLxx0000004CfIGAU" // Quote Line ID or Order Line ID to update
      ],
      "contextNode": {
```

```

        "Discount": 10,
        "Quantity": 5
      }
    ],
    "deletedNodes": [
      {
        "contextNodePath": [
          "4f23961a5c98806f89305e064c67b397e93f1bb8a2a7a3a80db506f1d4110ee9",
          "0Q0xx0000004CPACA2",
          "0QLxx0000004CfIGAU" // Quote Line Item ID to delete
        ]
      }
    ]
  }
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
addedNodes	Context Node Input[]	Details of the nodes to be added.	Required	62.0
deletedNodes	Context Node Input[]	Details of the nodes to be deleted.	Required	62.0
execution Settings	Execution Settings Input[]	Settings to run the pricing or configuration rules.	Optional	62.0
updatedNodes	Context Node Input[]	Details of the nodes to be updated.	Required	62.0

Response Bodies

Learn more about the available response bodies.

[Amendment](#)

Output representation of the details of an amendment record.

[ARC Base Error](#)

Output representation of the error response related to the amendment, renewal, or cancellation of assets.

[Cancellation](#)

Output representation of the details of a cancellation record.

[Clone Sales Transaction](#)

Output representation for the result of cloning records within a sales transaction.

[Clone Sales Transaction Error Response](#)

Output representation of the errors that occur during the clone sales transaction operation.

[Instant Pricing](#)

Output representation containing the results of the instant pricing request.

[Object Reference](#)

Output representation of an sObject with a reference ID along with any potential error.

[Place Order Error Response](#)

Output representation of the error response for the place order request.

[Place Order Response](#)

Output representation of the request to create or update an order.

[Place Quote Error Response](#)

Output representation of the error responses of a place quote request.

[Place Quote](#)

Output representation of the request to create or update a quote.

[Preview Approval](#)

Output representation of the details of a preview approval request.

[Preview Approval Chain Item](#)

Output representation of the details of an approval chain item for a specific group.

[Preview Approval Error](#)

Output representation of the error details associated with the Preview Approval API.

[Preview Approval Item](#)

Output representation of the details of a specific approval item with an approval chain.

[Ramp Deal Service Error Response](#)

Output representation of the details of errors encountered during the processing of the API request.

[Ramp Deal Service](#)

Output representation of the details of a created, updated, or deleted ramp deal.

[Read Sales Transaction](#)

Output representation of the request to read a sales transaction.

[Read Sales Transaction Records](#)

Output representation of the details of a map of keys and associated values. The keys are record type names, such as a Quote or QuoteLineItem, and values are lists of records of that type.

[Renewal](#)

Output representation of the details of a renewal record.

[Sales Transaction](#)

Output representation of the request to create a sales transaction.

[Sales Transaction Context](#)

Output representation of the context details that are associated with a sales transaction.

[Sales Transaction Error Response](#)

Output representation of the error details associated with the Place Sales Transaction API.

[Sales Transaction Record](#)

Generic output representation for any sales transaction record type.

[Supplemental Transaction Error Response](#)

Output representation of the error details associated with the Place Supplemental Transaction API.

[Supplemental Transaction](#)

Output representation of the details of the created supplemental order.

Amendment

Output representation of the details of an amendment record.

JSON example

```
{
  "amendmenRecordId": "0Q0xx0000004NsSCAU",
  "errors": [
    {
      "errorCode": "REQUIRED_FIELD_MISSING",
      "errorMessage": "Specify a value for quantityChange, and try again."
    }
  ],
  "requestId": "16Pxx0000004NIy",
  "success": true
}
```

Properties

Property Name	Type	Description	Filter Group and Version	Available Version
amendmentRecordId	String	ID of the amendment record that's created for a quote or an order.	Small, 62.0	62.0
errors	ARC Base Error on page 1014[]	Error responses if the creation of an amendment record fails.	Small, 62.0	62.0
requestId	String	Request ID that's used to track an async request.	Small, 62.0	62.0
success	Boolean	Indicates whether the API request is successful (<code>true</code>) or not (<code>false</code>).	Small, 62.0	62.0

ARC Base Error

Output representation of the error response related to the amendment, renewal, or cancellation of assets.

```
"errors": [
  {
    "errorCode": "REQUIRED_FIELD_MISSING",
    "errorMessage": "Specify a value for quantityChange, and try again."
  }
]
```

Property Name	Type	Description	Filter Group and Version	Available Version
errorCode	String	Code for the resultant error.	Big, 62.0	62.0
errorMessage	String	Error message for the resultant error.	Big, 62.0	62.0

Cancellation

Output representation of the details of a cancellation record.

JSON example

```
{
  "cancellationRecordId": "0Q0xx0000004NsSCAU",
  "errors": [
    {
      "errorCode": "REQUIRED_FIELD_MISSING",
      "errorMessage": "Specify a value for quantityChange, and try again."
    }
  ],
  "requestId": "16Pxx0000004NIy",
  "success": true
}
```

Properties

Property Name	Type	Description	Filter Group and Version	Available Version
cancellationRecordId	String	ID of the cancellation record that's created for a quote or an order.	Small, 62.0	62.0
errors	ARC Base Error on page 1014[]	Error responses if the creation of a cancellation record fails.	Small, 62.0	62.0
requestId	String	Request ID that's used to track the async request.	Small, 62.0	62.0
success	Boolean	Indicates whether the API request is successful (<code>true</code>) or not (<code>false</code>).	Small, 62.0	62.0

Clone Sales Transaction

Output representation for the result of cloning records within a sales transaction.

JSON example

This example shows a sample of a successful response.

```
{
  "requestId": "9356bcbf04f06e22360a09807c13e1d4e395",
  "salesTransactionId": "0Q0SG000000ACxf0AG",
  "errors": [],
  "success": true
}
```

This example shows a sample error response.

```
{
  "requestId": "9356bcbf04f06e22360a09807c13e1d4e395",
  "salesTransactionId": "0Q0SG000000ACxf0AG",
  "errors": [
    {

```

```

        "errorCode": "INVALID_API_INPUT",
        "message": "Specify only one record",
        "referenceId": "0QLxx0000004CBYGA2"
    }
],
"success": false
}

```

Properties

Name	Type	Description	Available Version
requestId	String	Request ID of the process that can be used to query the async status.	64.0
salesTransactionId	String	ID of the quote line item, order item, quote line group, or order item group record.	64.0
success	Boolean	Indicates whether the synchronous part of the processing is successful (<code>true</code>) or not (<code>false</code>).	64.0
errors	Clone Sales Transaction Error Response[]	List of errors encountered during synchronous processing.	64.0

Clone Sales Transaction Error Response

Output representation of the errors that occur during the clone sales transaction operation.

JSON example

```

{
  "errors": [
    {
      "errorCode": "INVALID_API_INPUT",
      "message": "Specify only one record",
      "referenceId": "0QLxx0000004CBYGA2"
    }
  ]
}

```

Properties

Name	Type	Description	Available Version
errorCode	String	Code associated with the error.	64.0
message	String	Message associated with the error.	64.0
referenceId	String	Reference ID associated with the error.	64.0

Instant Pricing

Output representation containing the results of the instant pricing request.

Sample Response

```

{
  "correlationid": "123",
  "contextid": "abcl23",
  "records": [
    {
      "referenceid": "refQuote",
      "record": {
        "attributes": {
          "type": "Quote",
          "method": "POST"
        },
        "quantity": "2"
      },
      "error": {
        "errorCode": "INVALID_API_INPUT",
        "message": "Reference Id format is irrelevant."
      }
    }
  ],
  "success": true
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
contextId	String	Context ID returned by the context service.	Small, 59.0	59.0
correlationId	String	Client-generated ID for tracking multiple related API calls.	Small, 59.0	59.0
records	Object Reference []	List of records related to pricing results.	Small, 59.0	59.0
success	Boolean	Indicates whether the fetching of instant pricing is successful (<code>true</code>) or not (<code>false</code>).	Small, 59.0	59.0

Object Reference

Output representation of an `sObject` with a reference ID along with any potential error.

Sample Response

```

{
  "referenceid": "refQuote",
  "record": {
    "attributes": {
      "type": "Quote",
      "method": "POST"
    },
    "quantity": "2"
  },
  "error": {

```

```

    "errorCode": "INVALID_API_INPUT",
    "message": "Reference Id format is irrelevant."
  }
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
referenceId	String	ID that identifies the specific Salesforce object that's returned in the API response.	Small, 59.0	59.0
record	Map<String, Object>	The sObject record data represented as a map of attribute names to their values.	Small, 59.0	59.0
error	Detailed information about any error associated with the sObject in the response.	Detailed information about any error associated with the sObject in the response.	Small, 59.0	59.0

Place Order Error Response

Output representation of the error response for the place order request.

Property Name	Type	Description	Filter Group and Version	Available Version
errorCode	String	Code representing the type of error encountered during the place order create request.	Small, 60.0	60.0
message	String	Message stating the reason for the error, if any.	Small, 60.0	60.0
referenceId	String	Reference ID associated with the specific error instance for tracking and reference purposes.	Small, 60.0	60.0

Place Order Response

Output representation of the request to create or update an order.

JSON example

```

{
  "requestId": "16PRM0000004DBq",
  "orderId": "801S70000001VKgIAM",
  "success": true,
  "errors": [],
  "statusURL": "/services/data/vXX.X/subjects/AsyncOperationTracker/16PRM0000004DBq"
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
errors	Place OrderError Response on page 1018[]	List of errors encountered during the synchronous processing.	Small, 60.0	60.0
orderId	String	ID of the order created after a successful request.	Small, 60.0	60.0
requestId	String	Request ID of the process to query asynchronous status of the place order API.	Small, 60.0	60.0
statusURL	String	Asynchronous status URL of the request, if available.	Small, 60.0	60.0
success	Boolean	Indicates whether the synchronous part of the processing is successful (<code>true</code>) or not (<code>false</code>).	Small, 60.0	60.0

Place Quote Error Response

Output representation of the error responses of a place quote request.

JSON Example

```
{
  "errorCode": "INVALID_API_INPUT",
  "message": "Include record type and method in the request and try again.",
  "referenceId": "refQuoteItem2"
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
errorCode	String	Error code representing the type of error encountered in the create place quote request.	Small, 60.0	60.0
message	String	Message stating the reason for the error, if any.	Small, 60.0	60.0
referenceId	String	Reference ID associated with the specific error instance for tracking and reference purposes.	Small, 60.0	60.0

Place Quote

Output representation of the request to create or update a quote.

JSON Example

This example shows a sample response of the place quote request.

```
{
  "quoteId": "0Q0xx0000004E2mCAE",
  "requestIdentifier": "95Txx0000004Cx2",
  "responseError": [],
  "statusURL": "/services/data/v60.0/subjects/RevenueAsyncOperation/95Txx0000004Cx2EAE",
  "success": true
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
quoteId	String	ID of the quote created after a successful request.	Small, 60.0	60.0
request Identifier	String	Unique request identifier that can be used to poll the async request.	Big, 60.0	60.0
responseError	Place Quote Error Response []	List of errors encountered during the synchronous processing.	Small, 60.0	60.0
statusURL	String	Asynchronous status URL to track the operation, if available.	Big, 60.0	60.0
success	Boolean	Indicates whether the synchronous part of the processing is successful (<code>true</code>) or not (<code>false</code>).	Small, 60.0	60.0

Preview Approval

Output representation of the details of a preview approval request.

JSON example

```
{
  "approvalChainItems": [
    {
      "approvalChainName": "HR",
      "approvalItems": [
        {
          "additionalFields": {
            "isAutoReviewed": "false",
            "smartApprovalBasisWI": "",
            "reviewedBy": "005DU000000I9gtYAC"
          },
          "approvalConditionName": "HR Stage 2 Step 1",
          "assignedTo": "005DU000000I9gtYAC",
          "assigneeType": "User",
          "level": 1,
          "objectApiName": "Quote",
          "objectId": "0Q0DU0000005HZC0A2",

```



```

        "parents": [],
        "status": "Not Submitted",
        "stepApiName": "0jLDU0000001pIt2AI"
    }
]
},
{
    "approvalChainName": "MARKETING",
    "approvalItems": [
        {
            "additionalFields": {
                "isAutoReviewed": "false",
                "smartApprovalBasisWI": "",
                "reviewedBy": "005DU000000I6yzYAC"
            },
            "approvalConditionName": "MARKETING Stage 1 Step 1",
            "assignedTo": "005DU000000I6yzYAC",
            "assigneeType": "User",
            "level": 1,
            "objectApiName": "Quote",
            "objectId": "0Q0DU0000005HZC0A2",
            "parents": [],
            "status": "Not Submitted",
            "stepApiName": "0jLDU0000001pIq2AI"
        }
    ]
},
{
    "approvalChainName": "LEGAL",
    "approvalItems": [
        {
            "additionalFields": {
                "isAutoReviewed": "false",
                "smartApprovalBasisWI": "",
                "reviewedBy": "005DU000000I6yzYAC"
            },
            "approvalConditionName": "Legal Stage 1 Step 1",
            "assignedTo": "005DU000000I6yzYAC",
            "assigneeType": "User",
            "level": 1,
            "objectApiName": "Quote",
            "objectId": "0Q0DU0000005HZC0A2",
            "parents": [],
            "status": "Not Submitted",
            "stepApiName": "0jLDU0000001pIr2AI"
        },
        {
            "additionalFields": {
                "isAutoReviewed": "false",
                "smartApprovalBasisWI": "",
                "reviewedBy": "005DU000000I9gUYAS"
            },
            "approvalConditionName": "Legal Stage 2 Step 1",
            "assignedTo": "005DU000000I9gUYAS",

```

```

    "assigneeType": "User",
    "level": 2,
    "objectApiName": "Quote",
    "objectId": "0Q0DU0000005HZC0A2",
    "parents": [
      "0jLDU0000001pIr2AI"
    ],
    "status": "Not Submitted",
    "stepApiName": "0jLDU0000001pIu2AI"
  }
],
{
  "approvalChainName": "SALES",
  "approvalItems": [
    {
      "additionalFields": {
        "isAutoReviewed": "false",
        "smartApprovalBasisWI": "",
        "reviewedBy": "00GDU000000MPZg2AO"
      },
      "approvalConditionName": "Sales Stage 1 Step 1",
      "assignedTo": "00GDU000000MPZg2AO",
      "assigneeType": "Group",
      "level": 1,
      "objectApiName": "Quote",
      "objectId": "0Q0DU0000005HZC0A2",
      "parents": [],
      "status": "Not Submitted",
      "stepApiName": "0jLDU0000001pIs2AI"
    }
  ]
}
],
"flowOrchestrationDefinitionVersionId": "0jEDU0000001nZm",
"status": "Success"
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
approvalChain Items	Preview Approval Chain Item[]	Details of the approval items for a specific group.	Small, 65.0	65.0
correlationId	String	Unique token to track and associate related events or transactions across different components of the application. If unspecified, a Universally Unique Identifier (UUID) is generated.	Small, 65.0	65.0
error	Preview Approval Error[]	Details of the error encountered during the processing of the API request.	Small, 65.0	65.0

Property Name	Type	Description	Filter Group and Version	Available Version
flowOrchestrationDefinitionVersionId	String	ID of the flow orchestration definition version.	Small, 65.0	65.0
status	String	Status of the API request.	Small, 65.0	65.0

Preview Approval Chain Item

Output representation of the details of an approval chain item for a specific group.

JSON example

```
{
  "approvalChainItems": [
    {
      "approvalChainName": "HR",
      "approvalItems": [
        {
          "additionalFields": {
            "isAutoReviewed": "false",
            "smartApprovalBasisWI": "",
            "reviewedBy": "005DU000000I9gtYAC"
          },
          "approvalConditionName": "HR Stage 2 Step 1",
          "assignedTo": "005DU000000I9gtYAC",
          "assigneeType": "User",
          "level": 1,
          "objectApiName": "Quote",
          "objectId": "0Q0DU0000005HZC0A2",
          "parents": [],
          "status": "Not Submitted",
          "stepApiName": "0jLDU0000001pIt2AI"
        }
      ]
    },
    {
      "approvalChainName": "MARKETING",
      "approvalItems": [
        {
          "additionalFields": {
            "isAutoReviewed": "false",
            "smartApprovalBasisWI": "",
            "reviewedBy": "005DU000000I6yzYAC"
          },
          "approvalConditionName": "MARKETING Stage 1 Step 1",
          "assignedTo": "005DU000000I6yzYAC",
          "assigneeType": "User",
          "level": 1,
          "objectApiName": "Quote",
          "objectId": "0Q0DU0000005HZC0A2",
          "parents": []
        }
      ]
    }
  ]
}
```

```
        "status": "Not Submitted",
        "stepApiName": "0jLDU0000001pIq2AI"
    }
]
},
{
    "approvalChainName": "LEGAL",
    "approvalItems": [
        {
            "additionalFields": {
                "isAutoReviewed": "false",
                "smartApprovalBasisWI": "",
                "reviewedBy": "005DU000000I6yzYAC"
            },
            "approvalConditionName": "Legal Stage 1 Step 1",
            "assignedTo": "005DU000000I6yzYAC",
            "assigneeType": "User",
            "level": 1,
            "objectApiName": "Quote",
            "objectId": "0Q0DU0000005HZC0A2",
            "parents": [],
            "status": "Not Submitted",
            "stepApiName": "0jLDU0000001pIr2AI"
        },
        {
            "additionalFields": {
                "isAutoReviewed": "false",
                "smartApprovalBasisWI": "",
                "reviewedBy": "005DU000000I9gUYAS"
            },
            "approvalConditionName": "Legal Stage 2 Step 1",
            "assignedTo": "005DU000000I9gUYAS",
            "assigneeType": "User",
            "level": 2,
            "objectApiName": "Quote",
            "objectId": "0Q0DU0000005HZC0A2",
            "parents": [
                "0jLDU0000001pIr2AI"
            ],
            "status": "Not Submitted",
            "stepApiName": "0jLDU0000001pIu2AI"
        }
    ]
},
{
    "approvalChainName": "SALES",
    "approvalItems": [
        {
            "additionalFields": {
                "isAutoReviewed": "false",
                "smartApprovalBasisWI": "",
                "reviewedBy": "00GDU000000MPZg2AO"
            },
            "approvalConditionName": "Sales Stage 1 Step 1",
```

```

        "assignedTo": "00GDU000000MPZg2AO",
        "assigneeType": "Group",
        "level": 1,
        "objectApiName": "Quote",
        "objectId": "0Q0DU0000005HZC0A2",
        "parents": [],
        "status": "Not Submitted",
        "stepApiName": "0jLDU0000001pIs2AI"
    }
]
},
"flowOrchestrationDefinitionVersionId": "0jEDU0000001nZm",
"status": "Success"
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
approvalChain Name	String	Name of the approval chain for a specific group.	Small, 65.0	65.0
approvalItems	Preview Approval Item[]	Details of the approval items.	Small, 65.0	65.0

Preview Approval Error

Output representation of the error details associated with the Preview Approval API.

JSON example

This example shows a sample error scenario.

```

{
  "approvalChainItems": [],
  "error": {
    "correlationId": "0Q0DU0000005HZC0A2",
    "errorCode": "[xmlrpc=-1, statusCode=INVALID_API_INPUT, exceptionCode=null, scope=PublicApi, http=400]",
    "errorMessage": "Looks like the flow associated with this approval workflow for the current record isn't active. Activate the flow and try again.",
    "source": "PreviewApprovalDataProcessingException"
  },
  "status": "Failure"
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
correlationId	String	Unique token to track and associate related events or transactions across different components of the application. If unspecified, a Universally Unique Identifier (UUID) is generated.	Small, 65.0	65.0

Property Name	Type	Description	Filter Group and Version	Available Version
errorCode	String	Code for the resultant error.	Small, 65.0	65.0
errorMessage	String	Error message for the resultant error.	Small, 65.0	65.0
source	String	Details about the source of the error.	Small, 65.0	65.0

Preview Approval Item

Output representation of the details of a specific approval item with an approval chain.

JSON example

```
{
  "approvalChainItems": [
    {
      "approvalChainName": "HR",
      "approvalItems": [
        {
          "additionalFields": {
            "isAutoReviewed": "false",
            "smartApprovalBasisWI": "",
            "reviewedBy": "005DU000000I9gtYAC"
          },
          "approvalConditionName": "HR Stage 2 Step 1",
          "assignedTo": "005DU000000I9gtYAC",
          "assigneeType": "User",
          "level": 1,
          "objectApiName": "Quote",
          "objectId": "0Q0DU0000005HZC0A2",
          "parents": [],
          "status": "Not Submitted",
          "stepApiName": "0jLDU0000001pIt2AI"
        }
      ]
    },
    {
      "approvalChainName": "MARKETING",
      "approvalItems": [
        {
          "additionalFields": {
            "isAutoReviewed": "false",
            "smartApprovalBasisWI": "",
            "reviewedBy": "005DU000000I6yzYAC"
          },
          "approvalConditionName": "MARKETING Stage 1 Step 1",
          "assignedTo": "005DU000000I6yzYAC",
          "assigneeType": "User",
          "level": 1,
          "objectApiName": "Quote",
          "objectId": "0Q0DU0000005HZC0A2",
          "parents": [],

```

```

        "status": "Not Submitted",
        "stepApiName": "0jLDU0000001pIq2AI"
    }
]
},
{
    "approvalChainName": "LEGAL",
    "approvalItems": [
        {
            "additionalFields": {
                "isAutoReviewed": "false",
                "smartApprovalBasisWI": "",
                "reviewedBy": "005DU000000I6yzYAC"
            },
            "approvalConditionName": "Legal Stage 1 Step 1",
            "assignedTo": "005DU000000I6yzYAC",
            "assigneeType": "User",
            "level": 1,
            "objectApiName": "Quote",
            "objectId": "0Q0DU0000005HZC0A2",
            "parents": [],
            "status": "Not Submitted",
            "stepApiName": "0jLDU0000001pIr2AI"
        },
        {
            "additionalFields": {
                "isAutoReviewed": "false",
                "smartApprovalBasisWI": "",
                "reviewedBy": "005DU000000I9gUYAS"
            },
            "approvalConditionName": "Legal Stage 2 Step 1",
            "assignedTo": "005DU000000I9gUYAS",
            "assigneeType": "User",
            "level": 2,
            "objectApiName": "Quote",
            "objectId": "0Q0DU0000005HZC0A2",
            "parents": [
                "0jLDU0000001pIr2AI"
            ],
            "status": "Not Submitted",
            "stepApiName": "0jLDU0000001pIu2AI"
        }
    ]
},
{
    "approvalChainName": "SALES",
    "approvalItems": [
        {
            "additionalFields": {
                "isAutoReviewed": "false",
                "smartApprovalBasisWI": "",
                "reviewedBy": "00GDU000000MPZg2AO"
            },
            "approvalConditionName": "Sales Stage 1 Step 1",

```

```

        "assignedTo": "00GDU000000MPZg2AO",
        "assigneeType": "Group",
        "level": 1,
        "objectApiName": "Quote",
        "objectId": "0Q0DU0000005HZC0A2",
        "parents": [],
        "status": "Not Submitted",
        "stepApiName": "0jLDU0000001pIs2AI"
    }
]
},
"flowOrchestrationDefinitionVersionId": "0jEDU0000001nZm",
"status": "Success"
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
additional Fields	Map<String, String>	Details of any additional fields in the approval workflow.	Small, 65.0	65.0
approval ConditionName	String	Details of the configured conditions in the approval workflow.	Small, 65.0	65.0
assignedTo	String	Name of the assignee that the approval request is assigned to.	Small, 65.0	65.0
assigneeType	String	Type of assignee.	Small, 65.0	65.0
level	Integer	Hierarchy level of the approval item.	Small, 65.0	65.0
objectApiName	String	API name of the object to preview the approval for.	Small, 65.0	65.0
objectId	String	ID of the object to preview the approval for.	Small, 65.0	65.0
parents	String[]	Details of the parent step.	Small, 65.0	65.0
status	String	Status of the approval request.	Small, 65.0	65.0
stepApiName	String	API name of the step.	Small, 65.0	65.0

Ramp Deal Service Error Response

Output representation of the details of errors encountered during the processing of the API request.

Property Name	Type	Description	Filter Group and Version	Available Version
errorCode	String	Error code from the API request. For example, INVALID_INPUT_ERROR.	Small, 62.0	62.0
message	String	Error message from the API request.	Small, 62.0	62.0

Ramp Deal Service

Output representation of the details of a created, updated, or deleted ramp deal.

JSON Example

This example shows the sample response for the create, update, or view ramp deal requests.

```
{
  "correlationId": "0QLDU0000002t0Z4AQ",
  "errors": [],
  "salesTransactionContext": {
    "SalesTransaction": [
      {
        "LegalEntity": null,
        "Account": null,
        "HeaderDistributionType": null,
        "BillingCity": null,
        "AccountBusinessType": null,
        "HeaderDiscountType": null,
        "businessObjectType": "Quote",
        "QuoteAccount": null,
        "EmployeeCount": null,
        "SalesTransactionName": "WarrantyPriceRampAR",
        "StartDate": null,
        "HeaderDiscountValue": null,
        "SalesTransactionType": null,
        "Pricebook": "01sDU000000JGf4YAG",
        "Opportunity": null,
        "ShippingCountry": null,
        "ShippingCity": null,
        "BillingPostalCode": null,
        "id": "0Q0DU0000002f3d0AA",
        "BillToContact": null,
        "CalculationStatus": "CompletedWithTax",
        "Status": "Draft",
        "LastPricedDate": null,
        "Subtotal": 108.47145205479453,
        "OriginalActionType": null,
        "TotalAmount": 99.98,
        "CurrencyIsoCode": null,
        "ShippingStreet": null,
        "SalesTransactionItem": [
          {
            "LegalEntity": null,
            "ProductName": "Warranty",
            "businessObjectType": "QuoteLineItem",
            "Product": "01tDU000000EsWSYA0",
            "ItemIsPrimarySegment": true,
            "ListPrice": 49.99,
            "ValidationResult": null,
            "StartDate": "2024-08-23T00:00:00.000Z",
            "ContractVolumePasId": null,
            "BillingTreatment": null,
            "PeriodBoundaryStartMonth": null,
            "SalesTransactionSourceAsset": null,
          }
        ]
      }
    ]
  }
}
```

```
"id": "0QLDU0000002t0Z4AQ",
"PartnerDiscountPercent": null,
"PriceWaterFall": "0QLDU0000002t0Z4AQ:548201414593252",
"ItemProductRecipient": null,
"BillingFrequency": "Annual",
"ProductCode": "W001",
"DerivedPricingAttribute": null,
"TaxTreatment": "1ttDU0000001oGKYAY",
"Subtotal": 8.491452054794523,
"ItemRampIdentifier": "RDI5b5ce52b2db4484",
"ItemSegmentName": "Trial",
"PricebookEntry": "01uDU000000f4LSYAY",
"DiscountAmount": null,
"PricingTermCount": 0.0849315068493151,
"NetUnitPrice": 0,
"ItemEffectiveGrantDate": null,
"ProductCategory": null,
"SalesTransactionAction": null,
"SalesTransactionActionType": null,
"SalesTransactionItemGroup": null,
"PeriodBoundaryDay": null,
"LineItemDistributionType": null,
"ProrationPolicy": "0muDU00000029ryYAA",
"ContractDiscountType": null,
"TransactionType": null,
"ParentReference": null,
"Discount": 100,
"ProductSellingModel": "0jPDU00000029zb2AA",
"PricingTermUnit": "Annual",
"PricingSource": null,
"StockKeepingUnit": null,
"PartnerUnitPrice": null,
"ItemTotalAdjustmentAmount": -8.491452054794523,
"SalesTransactionItemSource": "0QLDU0000002t0Z4AQ",
"ContractAttributePasId": null,
"SubscriptionTerm": 1,
"SellingModelType": "TermDefined",
"EndQuantity": 2,
"NetTotalPrice": 0,
"TotalLineAmount": 8.491452054794523,
"ItemSegmentType": "FreeTrial",
"ProductBasedOn": null,
"Deleted": null,
"BillingReference": null,
"ArePartialPeriodsAllowed": true,
"ItemRecordedPrice": null,
"CustomProductName": "Warranty",
"ItemSegmentIdentifier": "SEG4380006alc2b416",
"SalesTransactionItemParent": "0Q0DU0000002f3d0AA",
"Quantity": 2,
"PeriodBoundary": "Anniversary",
"ContractDiscountValue": null,
"LineItemDiscountValue": null,
"ContractId": null,
```

```

    "EndDate": "2024-09-22T00:00:00.000Z",
    "ItemGroupSummarySubtotal": null,
    "IsContracted": null,
    "UnitPrice": 49.99,
    "StartQuantity": 0,
    "ContractPrice": null,
    "TotalPrice": 0,
    "ItemPath": null,
    "LineItemDiscountType": null
  },
  {
    "LegalEntity": null,
    "ProductName": "Warranty",
    "businessObjectType": "QuoteLineItem",
    "Product": "01tDU000000EsWSYA0",
    "ItemIsPrimarySegment": false,
    "ListPrice": 49.99,
    "ValidationResult": null,
    "StartDate": "2024-09-23T00:00:00.000Z",
    "ContractVolumePasId": null,
    "BillingTreatment": null,
    "PeriodBoundaryStartMonth": null,
    "SalesTransactionSourceAsset": null,
    "id": "0QLDU0000003CZ94AM",
    "PartnerDiscountPercent": null,
    "PriceWaterFall": "0QLDU0000003CZ94AM:548201414593252",
    "ItemProductRecipient": null,
    "BillingFrequency": "Annual",
    "ProductCode": "W001",
    "DerivedPricingAttribute": null,
    "TaxTreatment": "1ttDU0000001oGKYAY",
    "Subtotal": 99.98,
    "ItemRampIdentifier": "RDI5b5ce52b2db4484",
    "ItemSegmentName": "Year-1",
    "PricebookEntry": "01uDU000000f4LSYAY",
    "DiscountAmount": null,
    "PricingTermCount": 1,
    "NetUnitPrice": 49.99,
    "ItemEffectiveGrantDate": null,
    "ProductCategory": null,
    "SalesTransactionAction": null,
    "SalesTransactionActionType": null,
    "SalesTransactionItemGroup": null,
    "PeriodBoundaryDay": null,
    "LineItemDistributionType": null,
    "ProrationPolicy": "0muDU00000029ryYAA",
    "ContractDiscountType": null,
    "TransactionType": null,
    "ParentReference": null,
    "Discount": null,
    "ProductSellingModel": "0jPDU00000029zb2AA",
    "PricingTermUnit": "Annual",
    "PricingSource": null,
    "StockKeepingUnit": null,
  }

```

```
    "PartnerUnitPrice": null,
    "ItemTotalAdjustmentAmount": 0,
    "SalesTransactionItemSource": "0QLDU0000003CZ94AM",
    "ContractAttributePasId": null,
    "SubscriptionTerm": 1,
    "SellingModelType": "TermDefined",
    "EndQuantity": 2,
    "NetTotalPrice": 99.98,
    "TotalLineAmount": 99.98,
    "ItemSegmentType": "Yearly",
    "ProductBasedOn": null,
    "Deleted": null,
    "BillingReference": null,
    "ArePartialPeriodsAllowed": true,
    "ItemRecordedPrice": null,
    "CustomProductName": "Warranty",
    "ItemSegmentIdentifier": "SEG73ad7378e1ed4c5",
    "SalesTransactionItemParent": "0Q0DU0000002f3d0AA",
    "Quantity": 2,
    "PeriodBoundary": "Anniversary",
    "ContractDiscountValue": null,
    "LineItemDiscountValue": null,
    "ContractId": null,
    "EndDate": "2025-08-22T00:00:00.000Z",
    "ItemGroupSummarySubtotal": null,
    "IsContracted": null,
    "UnitPrice": 49.99,
    "StartQuantity": 0,
    "ContractPrice": null,
    "TotalPrice": 99.98,
    "ItemPath": null,
    "LineItemDiscountType": null
  }
],
"AppUsageAssignment": [
  {
    "businessObjectType": "AppUsageAssignment",
    "ParentReference": null,
    "Record": "0Q0DU0000002f3d0AA",
    "id": "0j8DU0000002VKiYAM",
    "AppUsageType": "RevenueLifecycleManagement"
  }
],
"BillingCountry": null,
"BillingStreet": null,
"ShippingPostalCode": null,
"SalesTransactionSource": "0Q0DU0000002f3d0AA",
"PrimaryIndustry": null,
"ShippingState": null,
"HeaderDistributionLogic": null,
"Contract": null,
"BillingState": null,
"AnnualRevenue": null,
"EffectiveDate": null
```

```

    }
  ]
},
"success": true,
"transactionContextId":
"d3fd83b007418ce4980340313b40fd45665b194973486ebac3674c2b8002336f"
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
correlationId	String	Resource ID to correlate the API request with the response.	Small, 62.0	62.0
errors	Ramp Deal Service Error Response[]	List of errors encountered during the processing of the API request.	Small, 62.0	62.0
sales Transaction Context	Map<String, Object>	Context object for the sales transaction with updated segment details.	Small, 62.0	62.0
success	Boolean	Indicates whether the API request is successful (<code>true</code>) or not (<code>false</code>).	Small, 62.0	62.0
transaction ContextId	String	ID of the sales transaction context record instance.	Small, 62.0	62.0

Read Sales Transaction

Output representation of the request to read a sales transaction.

JSON example

```

{
  "response": {
    "records": {
      "Quote": [
        {
          "data": {
            "Id": "0Q05g000000AJK954",
            "Name": "Sample Quote",
            "Status": "Draft",
            "TotalPrice": 1500
          }
        }
      ],
      "QuoteLineItem": [
        {
          "data": {
            "Id": "0QL5g000000DEF456",
            "Product2Id": "01t5g000000GUE752",
            "Quantity": 2,
            "UnitPrice": 750,
            "TotalPrice": 1500
          }
        }
      ]
    }
  }
}

```

```

    }
  }
]
},
"isSuccess": true,
"errorResponse": []
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
errors	Place Sales Transaction Error Response[]	List of errors encountered during the processing of the API request.	Small, 65.0	65.0
isSuccess	Boolean	Indicates whether the API request is successful (<code>true</code>) or not (<code>false</code>).	Small, 65.0	65.0
response	Read Sales Transaction Records[]	Contains a map of keys and associated values. The keys are record type names, such as a Quote or QuoteLineItem, and values are lists of records of that type.	Small, 65.0	65.0

Read Sales Transaction Records

Output representation of the details of a map of keys and associated values. The keys are record type names, such as a Quote or QuoteLineItem, and values are lists of records of that type.

JSON example

```

{
  "response": {
    "records": {
      "Quote": [
        {
          "data": {
            "Id": "0Q05g000000AJK954",
            "Name": "Sample Quote",
            "Status": "Draft",
            "TotalPrice": 1500
          }
        }
      ],
      "QuoteLineItem": [
        {
          "data": {
            "Id": "0QL5g000000DEF456",
            "Product2Id": "01t5g000000GUE752",
            "Quantity": 2,
            "UnitPrice": 750,
            "TotalPrice": 1500
          }
        }
      ]
    }
  }
}

```

```

    }
  ]
}
},
"isSuccess": true,
"errorResponse": []
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
records	Map<String, Sales Transaction Record >>	Map of record type names to the list of records.	Small, 65.0	65.0

Renewal

Output representation of the details of a renewal record.

JSON example

```

{
  "renewalRecordId": "0Q0xx0000004NsSCAU",
  "errors": [
    {
      "errorCode": "REQUIRED_FIELD_MISSING",
      "errorMessage": "Specify a value for quantityChange, and try again."
    }
  ],
  "requestId": "16Pxx0000004NIy",
  "success": true
}

```

Properties

Property Name	Type	Description	Filter Group and Version	Available Version
errors	ARC Base Error on page 1014[]	Error responses if the creation of a renewal record fails.	Small, 62.0	62.0
renewalRecordId	String	ID of the renewal record that's created for the Quote or Order record.	Small, 62.0	62.0
requestId	String	Request ID that's used to track the async request.	Small, 62.0	62.0
success	Boolean	Indicates whether the API request is successful (<code>true</code>) or not (<code>false</code>).	Small, 62.0	62.0

Sales Transaction

Output representation of the request to create a sales transaction.

JSON example

```
{
  "contextDetails": {
    "contextId": "e055bb18-d4e8-41c3-881e-0132b9561708",
    "isBuiltInTransaction": true
  },
  "errorResponse": {
    "errorCode": "INVALID_API_INPUT",
    "message": "Include record type and method in the request and try again.",
    "referenceId": "refQuoteItem2"
  },
  "isSuccess": true,
  "salesTransactionId": "0Q0xx0000004CNYCA2",
  "statusUrl": null,
  "trackerId": null
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
contextDetails	Sales Transaction Context	Details of the context that's created for the sales transaction.	Small, 63.0	63.0
errorResponse	Sales Transaction Error Response[]	Details of the error if the operation fails.	Small, 63.0	63.0
isSuccess	Boolean	Indicates if the operation is successful (<code>true</code>) or not (<code>false</code>).	Small, 63.0	63.0
salesTransactionId	String	ID of the sales transaction, such as a quote or an order.	Small, 63.0	63.0
statusUrl	String	URL to check the status of the operation.	Small, 63.0	63.0
trackerId	String	Unique identifier assigned to a specific operation or request that's used for tracking and referencing the operation.	Small, 63.0	63.0

The **Calculation Status** field for a quote or an order shows an intermediate status as `Saving` during the creation of a sales transaction. If the pricing calculation fails, then the **Calculation Status** field shows the `Pricing Calculation Failed` status. See [Quote standard object](#) for a list of applicable calculation status values.

Sales Transaction Context

Output representation of the context details that are associated with a sales transaction.

JSON example

```
{
  "contextDetails": {
    "contextId": "e055bb18-d4e8-41c3-881e-0132b9561708",
    "isBuiltInTransaction": true
  }
```



```

}
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
contextId	String	ID of the context that's created for a session of the sales transaction.	Small, 63.0	63.0
isBuiltInTransaction	Boolean	Indicates whether a new context ID is created for the sales transaction (<code>true</code>) or not (<code>false</code>). If the <code>contextId</code> property isn't specified, the Place Sales Transaction API generates it.	Small, 63.0	63.0

Sales Transaction Error Response

Output representation of the error details associated with the Place Sales Transaction API.

JSON example

```

{
  "errorResponse": {
    "errorCode": "INVALID_API_INPUT",
    "message": "Include record type and method in the request and try again.",
    "referenceId": "refQuoteItem2"
  }
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
errorCode	String	Code for the resultant error.	Small, 63.0	63.0
message	String	Error message for the resultant error.	Small, 63.0	63.0
referenceId	String	Unique ID that's associated with the specific error for tracking and reference purposes.	Small, 63.0	63.0

Sales Transaction Record

Generic output representation for any sales transaction record type.

JSON example

```

{
  "response": {
    "records": {
      "Quote": [
        {
          "data": {
            "Id": "0Q05g000000AJK954",

```

```

        "Name": "Sample Quote",
        "Status": "Draft",
        "TotalPrice": 1500
      }
    ],
    "QuoteLineItem": [
      {
        "data": {
          "Id": "0QL5g000000DEF456",
          "Product2Id": "01t5g000000GUE752",
          "Quantity": 2,
          "UnitPrice": 750,
          "TotalPrice": 1500
        }
      }
    ]
  },
  "isSuccess": true,
  "errorResponse": []
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
data	Map<String, Object>	Represents the data map for any sales transaction record.	Small, 65.0	65.0

Supplemental Transaction Error Response

Output representation of the error details associated with the Place Supplemental Transaction API.

Property Name	Type	Description	Filter Group and Version	Available Version
errorCode	String	Code for the resultant error.	Small, 64.0	64.0
message	String	Message stating the reason for error, if any.	Small, 64.0	64.0
referenceId	String	Unique ID that's associated with the specific error for tracking and reference purposes.	Small, 64.0	64.0

Supplemental Transaction

Output representation of the details of the created supplemental order.

JSON example

```

{
  "requestId": "16PRM0000004DBq",
  "statusURL": "/services/data/vXX.X/subjects/AsyncOperationTracker/16PRM0000004DBq",

```

```

"orderId": "801S70000001VKgIAM",
"success": true,
"errors": []
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
errors	Supplemental Transaction Error Response[]	List of errors encountered during synchronous processing.	Small, 64.0	64.0
requestId	String	Request ID of the process that can be used to query the async status.	Small, 64.0	64.0
statusURL	String	URL to check the status of the async operation, if available.	Small, 64.0	64.0
success	Boolean	Indicates whether the synchronous part of the processing is successful (<code>true</code>) or not (<code>false</code>).	Small, 64.0	64.0
supplementalTransactionId	String	ID of the created supplemental transaction.	Small, 64.0	64.0

Transaction Management Apex Reference

Use built-in Apex classes and interfaces grouped by namespace.

[CommerceOrders Namespace](#)

The `CommerceOrders` namespace provides classes and methods to place orders with integrated pricing, configuration, and validation.

[ConnectApi Namespace](#)

The `ConnectApi` namespace (also called Connect in Apex) provides an Apex class to specify details for asset transfer request from one account to another.

[CommerceTax Namespace](#)

Manage the communication between Salesforce and an external tax engine.

[PlaceQuote Namespace](#)

The `PlaceQuote` namespace provides classes and methods to create or update quotes with pricing preferences and configuration options.

[RevSalesTrxn Namespace](#)

Create a sales transaction, such as a quote or an order, with integrated pricing and configuration. Additionally, update an order or a quote, and insert and delete order or quote line items to calculate the estimated tax.

CommerceOrders Namespace

The `CommerceOrders` namespace provides classes and methods to place orders with integrated pricing, configuration, and validation.

 **Note:** This namespace has been deprecated as of API version 63.0. In API version 63.0 and later, use the new [RevSalesTrxn](#) namespace.

The `CommerceOrders` namespace includes these classes.

[CatalogRatesPreferenceEnum Enum](#)

Specifies the rate card entries defined in the catalog that must be fetched for order items, with usage-based selling during the order creation process.

[ConfigurationInputEnum Enum](#)

Specifies the configuration input for the request to place an order.

[ConfigurationOptionsInput Class](#)

Contains methods and properties to set the configuration options for the input to the product configurator.

[GraphRequest Class](#)

Contains constructors and properties to set the graph ID and a list of records to be ingested. The list of records is specified in a key-value map format that contains the field values of an order.

[PlaceOrderExecutor Class](#)

Contains methods to place an order with details of the graph request, pricing preferences, and configuration options.

[PlaceOrderResult Class](#)

Contains properties to hold the response to the place order request.

[PricingPreferenceEnum Enum](#)

Specifies the pricing preference during the create order process.

[RecordResource Class](#)

Contains constructors and properties to create a record object from field values of an order.

[RecordWithReferenceRequest Class](#)

Contains constructors and properties to associate a record object with a reference identifier.

CatalogRatesPreferenceEnum Enum

Specifies the rate card entries defined in the catalog that must be fetched for order items, with usage-based selling during the order creation process.

Usage

This enum is available when the Usage-Based Selling feature is enabled.

Enum Values

The `commerceorders.CatalogRatesPreferenceEnum` enum includes these values.

Value	Description
<code>Fetch</code>	Retrieves the rate card entries defined in the catalog for order items during the order creation process.
<code>Skip</code>	Skips the retrieval of rate card entries for order items during the order creation process. The default value is <code>skip</code> .

ConfigurationInputEnum Enum

Specifies the configuration input for the request to place an order.

Usage

Use these enum values for the `configurationInputEnum` property in the [PlaceOrderExecutor Class](#)

Enum Values

The `commerceorders.ConfigurationInputEnum` enum has these values.

Value	Description
<code>RunAndAllowErrors</code>	Run the configuration and proceed with order ingestion upon encountering any configuration errors.
<code>RunAndBlockErrors</code>	Run the configuration and block order ingestion upon encountering any configuration errors.
<code>Skip</code>	Skip the configuration execution.

ConfigurationOptionsInput Class

Contains methods and properties to set the configuration options for the input to the product configurator.

Namespace

[CommerceOrders](#)

Usage

This class holds the required details of the product configuration input. Set the class properties to enable default configuration, execution of configuration rules, and validation of the product catalog. Use these class properties as an input to the [PlaceOrderExecutor Class](#) method.

Example

```
CommerceOrders.ConfigurationOptionsInput configurationInput = new
CommerceOrders.ConfigurationOptionsInput();
configurationInput.validateProductCatalog = true;
configurationInput.validateAmendRenewCancel = true;
configurationInput.executeConfigurationRules = true;
configurationInput.addDefaultConfiguration = true;

CommerceOrders.GraphRequest graph = new CommerceOrders.GraphRequest('testGraph',
recordNodes);
CommerceOrders.PlaceOrderResult result = CommerceOrders.PlaceOrderExecutor.execute(graph,
pricingPreference, configurationPreference, configurationInput);
```

[ConfigurationOptionsInput Properties](#)

Set the `ConfigurationOptionsInput` class properties to add default configuration, execute configuration rules, and validate the product catalog.

[ConfigurationOptionsInput Methods](#)

Learn more about the methods available with the `ConfigurationOptionsInput` class.

ConfigurationOptionsInput Properties

Set the `ConfigurationOptionsInput` class properties to add default configuration, execute configuration rules, and validate the product catalog.

The `ConfigurationOptionsInput` class includes these properties.

[addDefaultConfiguration](#)

Sets the default product configuration, such as bundle and product attributes, for an order request.

[executeConfigurationRules](#)

Sets the requirement for an order to adhere to the configuration rules.

[validateAmendRenewCancel](#)

Sets the requirement to run validations related to amend, renew, or cancel processes.

[validateProductCatalog](#)

Sets the requirement to validate an order against the product catalog.

addDefaultConfiguration

Sets the default product configuration, such as bundle and product attributes, for an order request.

Signature

```
public Boolean addDefaultConfiguration {get; set;}
```

Property Value

Type: Boolean

Indicates whether to automatically add default configuration to the order (`true`) or not (`false`).

executeConfigurationRules

Sets the requirement for an order to adhere to the configuration rules.

Signature

```
public Boolean executeConfigurationRules {get; set;}
```

Property Value

Type: Boolean

Indicates whether the order must adhere to configuration rules during processing (`true`) or bypass them (`false`).

validateAmendRenewCancel

Sets the requirement to run validations related to amend, renew, or cancel processes.

Signature

```
public Boolean validateAmendRenewCancel {get; set;}
```

Property Value

Type: Boolean

Indicates whether to run validations related to amend, renew, or cancel processes (`true`) or not (`false`).

validateProductCatalog

Sets the requirement to validate an order against the product catalog.

Signature

```
public Boolean validateProductCatalog {get; set;}
```

Property Value

Type: Boolean

Indicates whether the order must be validated against the product catalog (`true`) or not (`false`).

ConfigurationOptionsInput Methods

Learn more about the methods available with the `ConfigurationOptionsInput` class.

The `ConfigurationOptionsInput` class includes these methods.

[equals\(obj\)](#)

Determines the equality of external objects in a list. This method is dynamic and is based on the `equals()` method in Java.

[hashCode\(\)](#)

Determines the uniqueness of the external object records in a list.

[toString\(\)](#)

Converts a value to a string.

equals (obj)

Determines the equality of external objects in a list. This method is dynamic and is based on the `equals()` method in Java.

Signature

```
public Boolean equals(Object obj)
```

Parameters

obj

Type: Object

Reference object that's used to compare with the class object.

Return Value

Type: Boolean

Indicates if the class object is same as the reference object (`true`) or not (`false`).

hashCode ()

Determines the uniqueness of the external object records in a list.

Signature

```
public Integer hashCode ()
```

Return Value

Type: Integer

Integer hash code that represents the value of the object. Equal objects as per the `equals ()` method must return the same hash code.

toString ()

Converts a value to a string.

Signature

```
public String toString ()
```

Return Value

Type: String

GraphRequest Class

Contains constructors and properties to set the graph ID and a list of records to be ingested. The list of records is specified in a key-value map format that contains the field values of an order.

Namespace

[CommerceOrders](#)

Example

Create the list of records to be ingested by using these steps.

- Create the list of records by constructing the `Map<String, Object>` map of field values of an order.

```
List<CommerceOrders.RecordWithReferenceRequest> recordNodes = new
List<CommerceOrders.RecordWithReferenceRequest>();

// Prepare for the Order
Map<String, Object> orderFieldValues = new Map<String, Object>();
orderFieldValues.put('Pricebook2Id', '01sDU00000001EIIYAY');
orderFieldValues.put('AccountId', '001DU000001nIPKYA2');
orderFieldValues.put('EffectiveDate', '2024-01-01');
```

- To create a record object from the field values, create an instance of the `RecordResource` class.

```
CommerceOrders.RecordResource orderRecord = new
CommerceOrders.RecordResource(Order.getSubjectType(), 'POST');
orderRecord.fieldValues = orderFieldValues;
```

- To associate the `Record` object with a reference identifier, create an instance of the `RecordWithReferenceRequest` class.

```
CommerceOrders.RecordWithReferenceRequest orderRecordNode = new
CommerceOrders.RecordWithReferenceRequest('refOrder', orderRecord);
recordNodes.add(orderRecordNode);

// Prepare for the App Usage Assignment
Map<String, Object> auaFieldValues = new Map<String, Object>();
auaFieldValues.put('AppUsageType', 'RevenueLifecycleManagement');
auaFieldValues.put('RecordId', '{@refOrder.id}');

CommerceOrders.RecordResource auaRecord = new
CommerceOrders.RecordResource(AppUsageAssignment.getSubjectType(), 'POST');
auaRecord.fieldValues = auaFieldValues;


CommerceOrders.RecordWithReferenceRequest auaRecordNode = new
CommerceOrders.RecordWithReferenceRequest('refAppTag', auaRecord);
recordNodes.add(auaRecordNode);

// Prepare for the Order Item
Map<String, Object> oiFieldValues = new Map<String, Object>();
oiFieldValues.put('OrderId', '{@refOrder.id}');
oiFieldValues.put('PricebookEntryId', '01uDU000000YpKIYAW');
oiFieldValues.put('Product2Id', '01tDU000000ESCSYA4');
oiFieldValues.put('Quantity', 2);
oiFieldValues.put('UnitPrice', 800);

CommerceOrders.RecordResource oiRecord = new
CommerceOrders.RecordResource(OrderItem.getSubjectType(), 'POST');
oiRecord.fieldValues = oiFieldValues;

CommerceOrders.RecordWithReferenceRequest oiRecordNode = new
CommerceOrders.RecordWithReferenceRequest('refOrderItem', oiRecord);
recordNodes.add(oiRecordNode);
```

- Invoke the Place Order Apex API.

 **Note:** The `CatalogRatesPreferenceEnum` enum is available when the Usage-Based Selling feature is enabled.

```
// Invoke the Place Order Apex API
CommerceOrders.PricingPreferenceEnum pricingPreference =
CommerceOrders.PricingPreferenceEnum.System;
CommerceOrders.CatalogRatesPreferenceEnum catalogRatesPreference =
CommerceOrders.CatalogRatesPreferenceEnum.Fetch;
CommerceOrders.ConfigurationInputEnum configurationPreference =
CommerceOrders.ConfigurationInputEnum.RunAndAllowErrors;
CommerceOrders.ConfigurationOptionsInput configurationInput = new
CommerceOrders.ConfigurationOptionsInput();
configurationInput.validateProductCatalog = true;
configurationInput.validateAmendRenewCancel = true;
configurationInput.executeConfigurationRules = true;
configurationInput.addDefaultConfiguration = true;
```

- To contain all record objects, create an instance of the `GraphRequest` class.

```
CommerceOrders.GraphRequest graph = new CommerceOrders.GraphRequest('testGraph',
recordNodes);
CommerceOrders.PlaceOrderResult result = CommerceOrders.PlaceOrderExecutor.execute(graph,
pricingPreference, catalogRatesPreference, configurationPreference, configurationInput);

// Process any error, if exists
if (!result.success) {
    List<ConnectApi.PlaceOrderErrorResponse> errors = result.responseError;
    for (ConnectApi.PlaceOrderErrorResponse error : errors) {
        System.debug(error.errorCode + ': ' + error.message);
    }
}
```

[GraphRequest Constructors](#)

Learn more about the available constructors with the `GraphRequest` class.

[GraphRequest Properties](#)

Learn more about the available properties with the `GraphRequest` class.

GraphRequest Constructors

Learn more about the available constructors with the `GraphRequest` class.

The `GraphRequest` class includes these constructors.

[GraphRequest\(graphId, records\)](#)

Creates an instance of the `GraphRequest` class to assign the graph ID and a list of records to be ingested.

GraphRequest(graphId, records)

Creates an instance of the `GraphRequest` class to assign the graph ID and a list of records to be ingested.

Signature

```
public GraphRequest(String graphId, List<commerceorders.RecordWithReferenceRequest> records)
```

Parameters

graphId

Type: String

ID of the graph.

records

Type: List<commerceorders.RecordWithReferenceRequest>

List of records to be ingested.

GraphRequest Properties

Learn more about the available properties with the `GraphRequest` class.

The `GraphRequest` class includes these properties.

[graphId](#)

Set the `graphId` property to assign the ID value of the graph.

graphId

Set the `graphId` property to assign the ID value of the graph.

Signature

```
public String graphId {get; set;}
```

Property Value

Type: String

PlaceOrderExecutor Class

Contains methods to place an order with details of the graph request, pricing preferences, and configuration options.

Namespace

[CommerceOrders](#)

Example

```
CommerceOrders.PlaceOrderResult resp =  
CommerceOrders.PlaceOrderExecutor.execute(graph, internalEnum, cEnum, cInput, catalogRatesPreference);
```

[PlaceOrderExecutor Methods](#)

Learn more about the methods available with the `PlaceOrderExecutor` class.

[PlaceOrderExecutor Example Implementation](#)

Place orders with integrated pricing, configuration, and validation, and manage them throughout their entire lifecycle. To place an order from Apex, refer to the example implementation of the `PlaceOrderExecutor` class.

PlaceOrderExecutor Methods

Learn more about the methods available with the `PlaceOrderExecutor` class.

The `PlaceOrderExecutor` class includes these methods.

[execute\(graphRequest, pricingPreferenceEnum, configurationInputEnum, configurationOptionsInput\)](#)

Use the method in the `PlaceOrderExecutor` class to execute the Place Order Apex API request by assigning the properties for graph request, pricing reference, and configuration options.

[execute\(graphRequest, pricingPreferenceEnum, catalogRatesPreference, configurationInputEnum, configurationOptionsInput\)](#)

Use the method in the `PlaceOrderExecutor` class to execute the Place Order Apex API request by assigning the properties for graph request, pricing reference, and configuration options. This method also includes the property to define fetching of rate card entries.

[execute\(graphRequest\)](#)

Use the method in the `PlaceOrderExecutor` class to execute the Place Order Apex API request by assigning the properties for graph request.

execute(graphRequest, pricingPreferenceEnum, configurationInputEnum, configurationOptionsInput)

Use the method in the `PlaceOrderExecutor` class to execute the Place Order Apex API request by assigning the properties for graph request, pricing reference, and configuration options.

Signature

```
public static commerceorders.PlaceOrderResult execute(commerceorders.GraphRequest
graphRequest, commerceorders.PricingPreferenceEnum pricingPreferenceEnum,
commerceorders.ConfigurationInputEnum configurationInputEnum,
commerceorders.ConfigurationOptionsInput configurationOptionsInput)
```

Parameters

graphRequest

Type: [commerceorders.GraphRequest](#)

The sObject graph values of the order payload to be ingested.

pricingPreferenceEnum

Type: [commerceorders.PricingPreferenceEnum](#)

Pricing preference during the order process.

configurationInputEnum

Type: [commerceorders.ConfigurationInputEnum](#)

Configuration input for the place order process.

configurationOptionsInput

Type: [commerceorders.ConfigurationOptionsInput](#) on page 1041

Configuration options during the ingestion process.

Return Value

Type: [commerceorders.PlaceOrderResult](#)

execute(graphRequest, pricingPreferenceEnum, catalogRatesPreference, configurationInputEnum, configurationOptionsInput)

Use the method in the `PlaceOrderExecutor` class to execute the Place Order Apex API request by assigning the properties for graph request, pricing reference, and configuration options. This method also includes the property to define fetching of rate card entries.

Signature

```
public static commerceorders.PlaceOrderResult execute(commerceorders.GraphRequest
graphRequest, commerceorders.PricingPreferenceEnum pricingPreferenceEnum,
commerceorders.CatalogRatesPreferenceEnum catalogRatesPreferenceEnum,
commerceorders.ConfigurationInputEnum configurationInputEnum,
commerceorders.ConfigurationOptionsInput configurationOptionsInput)
```

Parameters

graphRequest

Type: [commerceorders.GraphRequest](#)

The sObject graph values of the order payload to be ingested.

pricingPreferenceEnum

Type: [commerceorders.PricingPreferenceEnum](#)

Pricing preference during the order process.

catalogRatesPreference

Type: [commerceorders.CatalogRatesPreferenceEnum](#)

The rate card entries defined in the catalog that must be fetched for order items, with usage-based pricing during the order creation process. The `CatalogRatesPreferenceEnum` enum is available when the Usage-Based Selling feature is enabled.

configurationInputEnum

Type: [commerceorders.ConfigurationInputEnum](#)

Configuration input for the place order process.

configurationOptionsInput

Type: [commerceorders.ConfigurationOptionsInput](#) on page 1041

Configuration options during the ingestion process.

Return Value

Type: [commerceorders.PlaceOrderResult](#)

execute (graphRequest)

Use the method in the `PlaceOrderExecutor` class to execute the Place Order Apex API request by assigning the properties for graph request.

Signature

```
public static CommerceOrders.PlaceOrderResult execute (CommerceOrders.GraphRequest graphRequest)
```

Parameters

graphRequest

Type: [CommerceOrders.GraphRequest](#)

The sObject graph values of the order payload to be ingested.

Return Value

Type: [CommerceOrders.PlaceOrderResult](#)

PlaceOrderExecutor Example Implementation

Place orders with integrated pricing, configuration, and validation, and manage them throughout their entire lifecycle. To place an order from Apex, refer to the example implementation of the `PlaceOrderExecutor` class.

Namespace

[CommerceOrders](#)

Usage

Customize this example to suit your requirements. Create the list of records to be ingested by using these steps. Replace the respective IDs with the values that are present in your org. For example, replace the value of `Pricebook2Id` field with the price book ID that's present in the org.

Example:

- Create the list of records by constructing the `Map<String, Object>` map of field values of an order.

```
List<CommerceOrders.RecordWithReferenceRequest> recordNodes = new
List<CommerceOrders.RecordWithReferenceRequest> ();

// Prepare for the Order
Map<String, Object> orderFieldValues = new Map<String, Object> ();
orderFieldValues.put ('Pricebook2Id', '01sDU00000001EIYAY');
orderFieldValues.put ('AccountId', '001DU000001nIPKYA2');
orderFieldValues.put ('EffectiveDate', '2024-01-01');
```

- To create a record object from the field values, create an instance of the `RecordResource` class.

```
CommerceOrders.RecordResource orderRecord = new
```

```
CommerceOrders.RecordResource (Order.getSubjectType(), 'POST');
orderRecord.fieldValues = orderFieldValues;
```

- To associate the Record object with a reference identifier, create an instance of the `RecordWithReferenceRequest` class.

```
CommerceOrders.RecordWithReferenceRequest orderRecordNode = new
CommerceOrders.RecordWithReferenceRequest('refOrder', orderRecord);
recordNodes.add(orderRecordNode);

// Prepare for the App Usage Assignment
Map<String, Object> auaFieldValues = new Map<String, Object>();
auaFieldValues.put('AppUsageType', 'RevenueLifecycleManagement');
auaFieldValues.put('RecordId', '{@refOrder.id}');

CommerceOrders.RecordResource auaRecord = new
CommerceOrders.RecordResource(AppUsageAssignment.getSubjectType(), 'POST');
auaRecord.fieldValues = auaFieldValues;

CommerceOrders.RecordWithReferenceRequest auaRecordNode = new
CommerceOrders.RecordWithReferenceRequest('refAppTag', auaRecord);
recordNodes.add(auaRecordNode);

// Prepare for the Order Item
Map<String, Object> oiFieldValues = new Map<String, Object>();
oiFieldValues.put('OrderId', '{@refOrder.id}');
oiFieldValues.put('PricebookEntryId', '01uDU000000YpkiYAW');
oiFieldValues.put('Product2Id', '01tDU000000ESCSYA4');
oiFieldValues.put('Quantity', 2);
oiFieldValues.put('UnitPrice', 800);

CommerceOrders.RecordResource oiRecord = new
CommerceOrders.RecordResource(OrderItem.getSubjectType(), 'POST');
oiRecord.fieldValues = oiFieldValues;

CommerceOrders.RecordWithReferenceRequest oiRecordNode = new
CommerceOrders.RecordWithReferenceRequest('refOrderItem', oiRecord);
recordNodes.add(oiRecordNode);
```

- Invoke the Place Order Apex API.



Note: The `CatalogRatesPreferenceEnum` enum is available when the Usage-Based Selling feature is enabled.

```
// Invoke the Place Order Apex API
CommerceOrders.PricingPreferenceEnum pricingPreference =
CommerceOrders.PricingPreferenceEnum.System;
CommerceOrders.CatalogRatesPreferenceEnum catalogRatesPreference =
CommerceOrders.CatalogRatesPreferenceEnum.Fetch;
CommerceOrders.ConfigurationInputEnum configurationPreference =
CommerceOrders.ConfigurationInputEnum.RunAndAllowErrors;
CommerceOrders.ConfigurationOptionsInput configurationInput = new
```

```
CommerceOrders.ConfigurationOptionsInput();
configurationInput.validateProductCatalog = true;
configurationInput.validateAmendRenewCancel = true;
configurationInput.executeConfigurationRules = true;
configurationInput.addDefaultConfiguration = true;
```

- To contain all record objects, create an instance of the `GraphRequest` class.

```
CommerceOrders.GraphRequest graph = new CommerceOrders.GraphRequest('testGraph',
recordNodes);
CommerceOrders.PlaceOrderResult result =
CommerceOrders.PlaceOrderExecutor.execute(graph, pricingPreference,
catalogRatesPreference, configurationPreference, configurationInput);

// Process any error, if exists
if (!result.success) {
    List<ConnectApi.PlaceOrderErrorResponse> errors = result.responseError;
    for (ConnectApi.PlaceOrderErrorResponse error : errors) {
        System.debug(error.errorCode + ': ' + error.message);
    }
}
```

PlaceOrderResult Class

Contains properties to hold the response to the place order request.

Namespace

[CommerceOrders](#)

Example

```
CommerceOrders.PlaceOrderResult resp =
CommerceOrders.PlaceOrderExecutor.execute(graph, internalEnum, cEnum, cInput, catalogRatesPreference);
```

[PlaceOrderResult Properties](#)

Learn more about the available properties with the `PlaceOrderResult` class.

PlaceOrderResult Properties

Learn more about the available properties with the `PlaceOrderResult` class.

The `PlaceOrderResult` class includes these properties.

[orderId](#)

Get the ID of the order that's created after a successful request.

[requestIdentifier](#)

Get the request ID of the process to query the asynchronous status of the Place Order Apex API.

[responseError](#)

Get the list of errors encountered during the synchronous processing of the API request.

[statusURL](#)

Get the asynchronous status URL of the request, if available.

[success](#)

Get the request status of the synchronous part of the processing.

orderId

Get the ID of the order that's created after a successful request.

Signature

```
public String orderId {get; set;}
```

Property Value

Type: String

requestIdentifier

Get the request ID of the process to query the asynchronous status of the Place Order Apex API.

Signature

```
public String requestIdentifier {get; set;}
```

Property Value

Type: String

responseError

Get the list of errors encountered during the synchronous processing of the API request.

Signature

```
public List<commerceorders.PlaceOrderErrorResponse> responseError {get; set;}
```

Property Value

Type: List<ConnectApi.PlaceOrderErrorResponse>

statusURL

Get the asynchronous status URL of the request, if available.

Signature

```
public String statusURL {get; set;}
```

Property Value

Type: String

success

Get the request status of the synchronous part of the processing.

Signature

```
public Boolean success {get; set;}
```

Property Value

Type: Boolean

Indicates whether the synchronous part of the processing is successful (`true`) or not (`false`).

PricingPreferenceEnum Enum

Specifies the pricing preference during the create order process.

Usage

Used by the [PlaceOrderExecutor](#) class.

Enum Values

The `commerceorders.PricingPreferenceEnum` enum includes these values.

Value	Description
Force	Enforce pricing during the order ingestion process.
Skip	Skip pricing during the order ingestion process.
System	Determine whether a pricing calculation is required.

RecordResource Class

Contains constructors and properties to create a record object from field values of an order.

Namespace

[CommerceOrders](#)

Example

```
CommerceOrders.RecordResource orderRecord = new
CommerceOrders.RecordResource(Order.getSubjectType(), 'POST');
orderRecord.fieldValues = orderFieldValues;
```

[RecordResource Constructors](#)

Learn more about the available constructors with the `RecordResource` class.

[RecordResource Properties](#)

Learn more about the available properties with the `RecordResource` class.

RecordResource Constructors

Learn more about the available constructors with the `RecordResource` class.

The `RecordResource` class includes these constructors.

[RecordResource\(type, method, id\)](#)

Creates an instance of the `RecordResource` class to assign values to the fields of an order item by using the `sObject` type, API method, and order ID properties.

[RecordResource\(type, method\)](#)

Creates an instance of the `RecordResource` class to assign the values to the fields of an order item by using the `sObject` type and API method properties.

RecordResource(type, method, id)

Creates an instance of the `RecordResource` class to assign values to the fields of an order item by using the `sObject` type, API method, and order ID properties.

Signature

```
public RecordResource(Schema.SObjectType type, String method, Id id)
```

Parameters

type

Type: [Schema.SObjectType](#)

Object that's returned from the field describe result using the `getReferenceTo()` method or from the `sObject` describe result using the `getSObjectType()` method.

method

Type: String

Method for the API request, such as POST or PATCH.

id

Type: Id

ID of the order.

RecordResource (type, method)

Creates an instance of the `RecordResource` class to assign the values to the fields of an order item by using the `sObject` type and API method properties.

Signature

```
public RecordResource (Schema.SObjectType type, String method)
```

Parameters

type

Type: [Schema.SObjectType](#)

Object that's returned from the field describe result using the `getReferenceTo ()` method or from the `sObject` describe result using the `getSObjectType ()` method.

method

Type: String

Method for the API request, such as POST or PATCH.

RecordResource Properties

Learn more about the available properties with the `RecordResource` class.

The `RecordResource` class includes these properties.

[fieldValues](#)

Set the `fieldValues` property to assign values to the fields to update the order record.

[id](#)

Set the `id` property to assign the ID of the order record.

[method](#)

Set the `method` property to specify the API request method, such as POST or PATCH.

[type](#)

Set the `type` property to assign the object type that's returned from the field describe result using the `getReferenceTo ()` method or from the `sObject` describe result using the `getSObjectType ()` method.

fieldValues

Set the `fieldValues` property to assign values to the fields to update the order record.

Signature

```
public Map<String,ANY> fieldValues {get; set;}
```

Property Value

Type: [List<Map<String,ANY>>](#)

id

Set the `id` property to assign the ID of the order record.

Signature

```
public String id {get; set;}
```

Property Value

Type: String

method

Set the `method` property to specify the API request method, such as POST or PATCH.

Signature

```
public String method {get; set;}
```

Property Value

Type: String

type

Set the `type` property to assign the object type that's returned from the field describe result using the `getReferenceTo ()` method or from the `sObject` describe result using the `getSObjectType ()` method.

Signature

```
public Schema.SObjectType type {get; set;}
```

Property Value

Type: [Schema.SObjectType](#)

RecordWithReferenceRequest Class

Contains constructors and properties to associate a record object with a reference identifier.

Namespace

[CommerceOrders](#)

Example

```
CommerceOrders.RecordWithReferenceRequest orderRecordNode = new  
CommerceOrders.RecordWithReferenceRequest('refOrder', orderRecord);
```

[RecordWithReferenceRequest Constructors](#)

Learn more about the available constructors with the `RecordWithReferenceRequest` class.

[RecordWithReferenceRequest Properties](#)

Learn more about the available properties with the `RecordWithReferenceRequest` class.

RecordWithReferenceRequest Constructors

Learn more about the available constructors with the `RecordWithReferenceRequest` class.

The `RecordWithReferenceRequest` class includes these constructors.

[RecordWithReferenceRequest\(referenceId, record\)](#)

Creates an instance of the `RecordWithReferenceRequest` class to associate a record object with a reference identifier by using the `referenceId` and `record` object properties.

RecordWithReferenceRequest(referenceId, record)

Creates an instance of the `RecordWithReferenceRequest` class to associate a record object with a reference identifier by using the `referenceId` and `record` object properties.

Signature

```
public RecordWithReferenceRequest(String referenceId, commerceorders.RecordResource record)
```

Parameters

referenceId

Type: String

Reference ID that maps to the subrequest response and can be used to reference the response in subsequent subrequests. You can reference the `referenceId` in either the body or URL of a subrequest. Use this syntax to include a reference:

@{referenceId.FieldName}. See [referenceId property of a composite subrequest](#).

record

Type: [commerceorders.RecordResource](#)

Record object that's defined using the `RecordResource` class.

RecordWithReferenceRequest Properties

Learn more about the available properties with the `RecordWithReferenceRequest` class.

The `RecordWithReferenceRequest` class includes these properties.

[record](#)

Set the `record` property to specify the record object that's defined by using the `RecordResource` class.

[referenceId](#)

Set the `referenceId` property to specify the reference ID that maps to the subrequest response. This reference ID can be used to reference the response in subsequent subrequests.

record

Set the `record` property to specify the record object that's defined by using the `RecordResource` class.

Signature

```
public CommerceOrders.RecordResource record {get; set;}
```

Property Value

Type: [CommerceOrders.RecordResource](#)

referenceId

Set the `referenceId` property to specify the reference ID that maps to the subrequest response. This reference ID can be used to reference the response in subsequent subrequests.

Signature

```
public String referenceId {get; set;}
```

Property Value

Type: String

ConnectApi Namespace

The `ConnectApi` namespace (also called `Connect` in Apex) provides an Apex class to specify details for asset transfer request from one account to another.

These classes are available in the `ConnectApi` namespace.

[ConnectApi Input Classes](#)

Transaction Management includes this Apex input class.

ConnectApi Input Classes

Transaction Management includes this Apex input class.

[ConnectApi.TransferRecordInputRepresentation](#)

Input representation of the details of the assets to be transferred.

ConnectApi.TransferRecordInputRepresentation

Input representation of the details of the assets to be transferred.

This Apex class is used by the `transferRecords` apex-defined input variable. See [Initiate Transfer Action](#) on page 1239.

Property	Type	Description	Required or Optional	Available Version
assetId	String	ID of the asset to transfer.	Required	65.0
transferQuantity	Double	Transfer quantity for the request.	Required	65.0

CommerceTax Namespace

Manage the communication between Salesforce and an external tax engine.

The `CommerceTax` namespace includes these classes.

[AbstractTransactionResponse Class](#)

Abstract class that contains methods for setting tax fields based on the external tax provider's response. Response classes that extend `AbstractTransactionResponse` inherit these methods.

[AddressesResponse Class](#)

Sets the tax address fields based on a response from the external tax engine. Contains setter methods for the Ship From, Ship To, and Sold To addresses.

[AddressResponse Class](#)

Contains a location code sent from the external tax engine.

[AmountDetailsResponse Class](#)

Sets tax amount fields based on a response from the external tax engine.

[CalculateTaxRequest Class](#)

Represents a request to an external tax engine to calculate tax. Extends the `TaxTransactionRequest` class and is the top-level request class.

[CalculateTaxResponse Class](#)

Sets the values of the tax transaction following a response from the external tax engine. Extends the `AbstractTransactionResponse` class and is the top-level response class.

[CalculateTaxType Enum](#)

Shows whether a tax calculation request is for estimated or actual tax.

[CustomTaxAttributesResponse Class](#)

Sets additional data or custom attributes in the tax response.

[ErrorResponse Class](#)

Use to respond with an error after receiving errors from the `PaymentGatewayAdapter` methods of the `CommercePayments` namespace, such as request-forbidden responses, custom validation errors, or expired API tokens.

[HeaderTaxAddressesRequest Class](#)

Captures the address values that are applicable for the quote or order transaction.

[ImpositionResponse Class](#)

Stores details of tax impositions from the external tax engine.

[JurisdictionResponse Class](#)

Stores details from the external tax engine about the tax jurisdiction used in the tax calculation process. A tax jurisdiction represents a government entity that collects tax.

[LineItemResponse Class](#)

Response class that stores details of a list of one or more line items on which the tax engine has calculated tax.

[LineTaxAddressesRequest Class](#)

Stores details of the addresses applied per line item in a tax calculation request.

[RequestType Enum](#)

Shows the type of tax request made to the tax engine.

[ResultCode Enum](#)

Code that represents the results of a tax request made to the tax engine.

[RuleDetailsResponse Class](#)

Contains details about the tax rules used for tax calculation.

[TaxAddressesRequest Class](#)

Contains methods to get and set tax address values.

[TaxAddressRequest Class](#)

Contains address details used for tax calculation.

[TaxApiException Class](#)

Contains details about any exceptions during the tax calculation process. Extends the `ApexBaseException` class.

[TaxCustomerDetailsRequest Class](#)

Contains customer details used in tax calculation.

[TaxDetailsResponse Class](#)

Stores details of the tax values that an external tax engine calculates in response to a tax calculation request.

[TaxEngineAdapter Interface](#)

Retrieves information from the tax engine and evaluates the information to define tax details.

[TaxEngineContext Class](#)

Wrapper class that stores details about the type of a tax calculation request.

[TaxLineItemRequest Class](#)

Contains line item details of a tax request.

[TaxSellerDetailsRequest Class](#)

Contains tax code details used in the tax calculation request.

[TaxTransactionRequest Class](#)

Abstract class for storing customer details used in tax calculation and estimation requests.

[TaxTransactionStatus Enum](#)

Shows whether the tax transaction has been committed or uncommitted.

[TaxTransactionType Enum](#)

Shows whether the tax transaction is for a credit or debit transaction.

AbstractTransactionResponse Class

Abstract class that contains methods for setting tax fields based on the external tax provider's response. Response classes that extend `AbstractTransactionResponse` inherit these methods.

Namespace

CommerceTax

[AbstractTransactionResponse Methods](#)

Learn more about the methods for AbstractTransactionResponse class.

AbstractTransactionResponse Methods

Learn more about the methods for AbstractTransactionResponse class.

The `AbstractTransactionResponse` class includes these methods.

[setAddresses\(addresses\)](#)

Uses an instance of `AddressesResponse` to set the values of tax address fields.

[setAmountDetails\(amountDetails\)](#)

Uses an instance of `AmountDetailsResponse` to set tax amount fields such as exemption amount and tax amount.

[setCurrencyIsoCode\(currencyIsoCode\)](#)

Sets the `currencyIsoCode` field.

[setCustomTaxAttributes\(customTaxAttributes\)](#)

Uses an instance of `CustomTaxAttributesResponse` class to include additional attributes in the tax response at the header level.

[setDescription\(dscptn\)](#)

Sets the `Description` field.

[setDocumentCode\(documentCode\)](#)

Sets the `DocumentCode` field. Document codes are often used to reference tax documents that the external tax engine uses in the tax calculation process. Document code acts as a unique link to chain-related transactions, such as amendment or refunds.

[setEffectiveDate\(effectiveDate\)](#)

Sets the `EffectiveDate` field. Effective Date fields are optional fields that store the date that a transaction takes effect. We provide these fields only for recordkeeping purposes – for example, if you must report an effective date to an external general ledger system. Salesforce doesn't use them to calculate any tax or payment values.

[setLineItems\(lineItems\)](#)

Uses an instance of the `LineItemResponse` class to set a list of line items. Each line item represents an item sent to an external tax engine for tax calculation.

[setReferenceDocumentCode\(referenceDocumentCode\)](#)

Sets the `ReferenceDocumentCode` field. Use this field to store the code of an additional document used in the tax calculation process. For example, use this field in case of a refund for a previously taxed purchase.

[setReferenceEntityId\(referenceEntityId\)](#)

Sets the ID of a reference entity. In Commerce Tax, a reference entity represents a record related to the items sent to the external tax engine for tax calculation. For example, if you sent order items for tax calculation, you could define the parent order as the reference entity.

[setTaxTransactionId\(taxTrxnId\)](#)

Sets the `TaxTransactionId` field using the ID of a tax transaction record. In Commerce Tax, a tax transaction record stores information about a specific tax calculation process.

[setTransactionDate\(transactionDate\)](#)

Sets the TransactionDate field.

setAddresses (addresses)

Uses an instance of `AddressesResponse` to set the values of tax address fields.

Signature

```
global void setAddresses (commercetax.AddressesResponse addresses)
```

Parameters

addresses

Type: [AddressesResponse](#)

Class that contains methods to set the Ship To, Ship From, and Sold To address information.

Return Value

Type: void

setAmountDetails (amountDetails)

Uses an instance of `AmountDetailsResponse` to set tax amount fields such as exemption amount and tax amount.

Signature

```
global void setAmountDetails (commercetax.AmountDetailsResponse amountDetails)
```

Parameters

amountDetails

Type: [AmountDetailsResponse](#)

Class that contains methods to set the tax exemption amount, tax amount, total amount, and total amount with tax.

Return Value

Type: void

setCurrencyIsoCode (currencyIsoCode)

Sets the currencyIsoCode field.

Signature

```
global void setCurrencyIsoCode (String currencyIsoCode)
```

Parameters

currencyIsoCode

Type: String

Three-letter ISO 4217 currency code associated with a tax object.

Return Value

Type: void

setCustomTaxAttributes (customTaxAttributes)

Uses an instance of `CustomTaxAttributesResponse` class to include additional attributes in the tax response at the header level.

Signature

```
global void setCustomTaxAttributes (commercetax.CustomTaxAttributesResponse  
customTaxAttributes)
```

Parameters

customTaxAttributes

Type: [CustomTaxAttributesResponse](#)

Additional data or custom attributes to include in the tax response.

Return Value

Type: void

setDescription (dscptn)

Sets the Description field.

Signature

```
global void setDescription (String dscptn)
```

Parameters

dscptn

Type: String

Optional field for providing additional information about a record.

Return Value

Type: void

setDocumentCode (documentCode)

Sets the DocumentCode field. Document codes are often used to reference tax documents that the external tax engine uses in the tax calculation process. Document code acts as a unique link to chain-related transactions, such as amendment or refunds.

Signature

```
global void setDocumentCode(String documentCode)
```

Parameters

documentCode

Type: String

Code for a tax document used in the tax calculation process.

Return Value

Type: void

setEffectiveDate (effectiveDate)

Sets the EffectiveDate field. Effective Date fields are optional fields that store the date that a transaction takes effect. We provide these fields only for recordkeeping purposes – for example, if you must report an effective date to an external general ledger system. Salesforce doesn't use them to calculate any tax or payment values.

Signature

```
global void setEffectiveDate(Datetime effectiveDate)
```

Parameters

effectiveDate

Type: Datetime

Optional field that stores the date that a transaction takes effect.

Return Value

Type: void

setLineItems (lineItems)

Uses an instance of the `LineItemResponse` class to set a list of line items. Each line item represents an item sent to an external tax engine for tax calculation.

Signature

```
global void setLineItems(List<commercetax.LineItemResponse> lineItems)
```

Parameters

lineItems

Type: List<[LineItemResponse](#)>

A list of line items sent to an external tax engine for tax calculation.

Return Value

Type: void

setReferenceDocumentCode (referenceDocumentCode)

Sets the ReferenceDocumentCode field. Use this field to store the code of an additional document used in the tax calculation process. For example, use this field in case of a refund for a previously taxed purchase.

Signature

```
global void setReferenceDocumentCode(String referenceDocumentCode)
```

Parameters

referenceDocumentCode

Type: String

The code for a document used in the tax calculation process.

Return Value

Type: void

setReferenceEntityId (referenceEntityId)

Sets the ID of a reference entity. In Commerce Tax, a reference entity represents a record related to the items sent to the external tax engine for tax calculation. For example, if you sent order items for tax calculation, you could define the parent order as the reference entity.

Signature

```
global void setReferenceEntityId(String referenceEntityId)
```

Parameters

referenceEntityId

Type: String

ID of a record related to the items sent for tax calculation.

Return Value

Type: void

setTaxTransactionId (taxTrxnId)

Sets the TaxTransactionId field using the ID of a tax transaction record. In Commerce Tax, a tax transaction record stores information about a specific tax calculation process.

Signature

```
global void setTaxTransactionId(String taxTrxnId)
```

Parameters

taxTrxnId

Type: String

The ID of a tax transaction record in Commerce Tax.

Return Value

Type: void

setTransactionDate (transactionDate)

Sets the TransactionDate field.

Signature

```
global void setTransactionDate(Datetime transactionDate)
```

Parameters

transactionDate

Type: Datetime

Date that a tax transaction occurred.

Return Value

Type: void

AddressesResponse Class

Sets the tax address fields based on a response from the external tax engine. Contains setter methods for the Ship From, Ship To, and Sold To addresses.

Namespace

[CommerceTax](#)

Usage

Because `AddressesResponse` contains multiple addresses, we recommend using multiple instances of `AddressResponse` to set unique values for each address.

Example

This code sample represents a portion of the code used in a mock tax adapter. In this example, you create three `AddressResponse` classes, set their location codes, and pass them to the `Ship To`, `Ship From`, and `Sold To` setter methods in `AddressesResponse`. In an actual implementation, your `AddressResponse` classes already have a location code based on the response from the external tax engine.

```
commercetax.AddressesResponse addressesRes = new commercetax.AddressesResponse();

//AddressResponse containing ShipTo information
commercetax.AddressResponse shipToAddress = new commercetax.AddressResponse();
shipToAddress.setLocationCode('1234567');

//AddressResponse containing ShipFrom information
commercetax.AddressResponse shipFromAddress = new commercetax.AddressResponse();
shipFromAddress.setLocationCode('84720385');

//AddressResponse containing Sold To information
commercetax.AddressResponse soldToAddress = new commercetax.AddressResponse();
soldToAddress.setLocationCode('92381749');

//set values of addressesRes
addressesRes.setShipFrom(shipFromAddress);
addressesRes.setShipTo(shipToAddress);
addressesRes.setSoldTo(soldToAddress);
```

[AddressesResponse Methods](#)

Learn more about the methods for `AddressesResponse` class.

AddressesResponse Methods

Learn more about the methods for `AddressesResponse` class.

The `AddressesResponse` class includes these methods.

[setShipFrom\(shipFrom\)](#)

Sets the value of a `ShipFrom` address field.

[setShipTo\(shipTo\)](#)

Sets the value of a `ShipTo` address field.

[setSoldTo\(soldTo\)](#)

Sets the value of a `SoldTo` address field.

setShipFrom(shipFrom)

Sets the value of a `ShipFrom` address field.

Signature

```
global void setShipFrom(commercetax.AddressResponse shipFrom)
```


Parameters

*shipFrom*Type: [AddressResponse](#)

A single address. Use this generic address parameter to store any type of address, such as Ship From, Ship To, and Sold To details. Users set the specific address in an `AddressResponse` instance and then pass that instance to the `AddressesResponse`'s `setShipTo()`, `setShipFrom()`, and `setSoldTo()` methods as needed.

Return Value

Type: void

setShipTo (shipTo)

Sets the value of a ShipTo address field.

Signature

```
global void setShipTo (commercetax.AddressResponse shipTo)
```

Parameters

*shipTo*Type: [AddressResponse](#)

Stores a single address. This is a generic address parameter and can be used to store any type of address, such as Ship From, Ship To, and Sold To details. Users set the specific address in an `AddressResponse` instance and then pass that instance to the `AddressesResponse`'s `setShipTo()`, `setShipFrom()`, and `setSoldTo()` methods as needed.

Return Value

Type: void

setSoldTo (soldTo)

Sets the value of a SoldTo address field.

Signature

```
global void setSoldTo (commercetax.AddressResponse soldTo)
```

Parameters

*soldTo*Type: [AddressResponse](#)

Stores a single address. This is a generic address parameter and can be used to store any type of address, such as Ship From, Ship To, Sold To details. Users set the specific address in an `AddressResponse` instance and then pass that instance to the `AddressesResponse`'s `setShipTo()`, `setShipFrom()`, and `setSoldTo()` methods as needed.

Return Value

Type: void

AddressResponse Class

Contains a location code sent from the external tax engine.

Namespace

[CommerceTax](#)

Usage

Use the `AddressResponse` class to set unique values for each address.

```
commercetax.AddressesResponse addressesRes = new commercetax.AddressesResponse();

//AddressResponse containing ShipTo information
commercetax.AddressResponse shipToAddress = new commercetax.AddressResponse();
shipToAddress.setLocationCode('1234567');

//AddressResponse containing ShipFrom information
commercetax.AddressResponse shipFromAddress = new commercetax.AddressResponse();
shipFromAddress.setLocationCode('84720385');

//AddressResponse containing Sold To information
commercetax.AddressResponse soldToAddress = new commercetax.AddressResponse();
soldToAddress.setLocationCode('92381749');

//set values of addressesRes
addressesRes.setShipFrom(shipFromAddress);
addressesRes.setShipTo(shipToAddress);
addressesRes.setSoldTo(soldToAddress);
```

[AddressResponse Methods](#)

Learn more about the available methods with the `AddressResponse` class.

AddressResponse Methods

Learn more about the available methods with the `AddressResponse` class.

The `AddressResponse` class includes these methods.

[setLocationCode\(locationCode\)](#)

Sets the value of a `LocationCode` field.

setLocationCode(locationCode)

Sets the value of a `LocationCode` field.

Signature

```
global void setLocationCode(String locationCode)
```

Parameters

locationCode

Type: String

A code that contains address information. This value can be passed to a method that sets the value of an address field.

Return Value

Type: void

AmountDetailsResponse Class

Sets tax amount fields based on a response from the external tax engine.

Namespace

[CommerceTax](#)

Example

In this example, an instance of `AmountDetailsResponse` class in a mock adapter calculates several tax amount fields. The `totalTax` and `totalAmount` parameters were defined in an instance of [LineItemResponse](#) class. The adapter then assigns the instance to `lineItemResponse`.

```
commercetax.AmountDetailsResponse amountResponse = new commercetax.AmountDetailsResponse();
amountResponse.setTotalAmountWithTax(totalTax+totalAmount);
amountResponse.setExemptAmount(0);
amountResponse.setTotalAmount(totalAmount);
amountResponse.setTaxAmount(totalTax);
lineItemResponse.setAmountDetails(amountResponse);
```

[AmountDetailsResponse Methods](#)

Learn more about the methods available from the `AmountDetailsResponse` class.

AmountDetailsResponse Methods

Learn more about the methods available from the `AmountDetailsResponse` class.

The following are methods for `AmountDetailsResponse`.

[setExemptAmount\(exemptAmount\)](#)

Sets the value of the `ExemptAmount` field.

[setTaxAmount\(taxAmount\)](#)

Sets the value of the `TaxAmount` field.

[setTotalAmount\(totalAmount\)](#)

Sets the value of the TotalAmount field.

[setTotalAmountWithTax\(totalAmtWithTax\)](#)

Sets the value of the TotalAmountWithTax field.

setExemptAmount (exemptAmount)

Sets the value of the ExemptAmount field.

Signature

```
global void setExemptAmount (Double exemptAmount)
```

Parameters

exemptAmount

Type: Double

The amount of a line item's total amount that's exempt from tax calculation.

Return Value

Type: void

setTaxAmount (taxAmount)

Sets the value of the TaxAmount field.

Signature

```
global void setTaxAmount (Double taxAmount)
```

Parameters

taxAmount

Type: Double

The calculated amount of tax for a line item.

Return Value

Type: void

setTotalAmount (totalAmount)

Sets the value of the TotalAmount field.

Signature

```
global void setTotalAmount (Double totalAmount)
```

Parameters

totalAmount

Type: Double

The total amount of a line item, excluding tax.

Return Value

Type: void

setTotalAmountWithTax (totalAmtWithTax)

Sets the value of the TotalAmountWithTax field.

Signature

```
global void setTotalAmountWithTax(Double totalAmtWithTax)
```

Parameters

totalAmtWithTax

Type: Double

The total amount of a line item combined with the calculated tax for that line item.

Return Value

Type: void

CalculateTaxRequest Class

Represents a request to an external tax engine to calculate tax. Extends the [TaxTransactionRequest](#) class and is the top-level request class.

Namespace

[CommerceTax](#)

Usage

Keep these considerations in mind when you use this class.

- If the `shouldVoidTax` property value is set to `true`, then the operation returns a response with `documentCode` property value updated to `referenceDocumentCode` property value that was originally sent in the request payload. The response also includes the `taxTransactionType` property value as `Void`. This indicates that the document specified in the `referenceDocumentCode` property value is voided.
- If document is locked or you can't void the tax transaction for any reason, then you can use the Tax Calculation request to perform another transaction such as a Credit Tax request. In this scenario, the response includes the `documentCode` property value that was sent in the request payload.
- If the document that's mentioned in the `referenceDocumentCode` property value isn't available in the tax engine, then an error response occurs with [ResultCode](#) on page 1107 value as `ReferenceDocumentCodeMissing`.

Example

See [TaxEngineAdapter Example Implementation](#) for more details on how to access information from the `CalculateTaxRequest` class.

[CalculateTaxRequest Constructors](#)

Learn more about the constructors that are available with the `CalculateTaxRequest` class. This constructor is intended for test usage and throws an exception if used outside of the Apex test context.

[CalculateTaxRequest Properties](#)

Learn more about the available properties with the `CalculateTaxRequest` class.

[CalculateTaxRequest Methods](#)

Learn more about the available methods with the `CalculateTaxRequest` class.

CalculateTaxRequest Constructors

Learn more about the constructors that are available with the `CalculateTaxRequest` class. This constructor is intended for test usage and throws an exception if used outside of the Apex test context.

The `CalculateTaxRequest` class includes these constructors.

[CalculateTaxRequest\(taxType\)](#)

This constructor is intended for test usage only and throws an exception if used outside of the Apex test context.

CalculateTaxRequest (taxType)

This constructor is intended for test usage only and throws an exception if used outside of the Apex test context.

Signature

```
global CalculateTaxRequest (commercetax.CalculateTaxType taxType)
```

Parameters

taxType

Type: [CalculateTaxType](#)

Indicates whether the tax calculation is for estimated tax or actual tax.

CalculateTaxRequest Properties

Learn more about the available properties with the `CalculateTaxRequest` class.

The `CalculateTaxRequest` class includes these properties.

[isCommit](#)

Indicates whether the tax calculation has to be committed or reported to government authorities.

[shouldVoidTax](#)

Indicates whether to void the tax transaction associated with a document that's mentioned in the `referenceDocumentCode` property value with `taxType` property value set to `Actual` and `isCommit` property value set to `true`.

[taxTransactionType](#)

Shows whether the tax transaction is for a credit or debit transaction.

[taxType](#)

Shows whether the tax calculation is for estimated or actual tax wherein only actual tax can be submitted.

isCommit

Indicates whether the tax calculation has to be committed or reported to government authorities.

Signature

```
global Boolean isCommit {get; set;}
```

Property Value

Type: Boolean

shouldVoidTax

Indicates whether to void the tax transaction associated with a document that's mentioned in the `referenceDocumentCode` property value with `taxType` property value set to `Actual` and `isCommit` property value set to `true`.

Signature

```
global commercetax.CalculateTaxType shouldVoidTax {get; set;}
```

Property Value

Type: Boolean

taxTransactionType

Shows whether the tax transaction is for a credit or debit transaction.

Signature

```
global commercetax.TaxTransactionType taxTransactionType {get; set;}
```

Property Value

Type: [TaxTransactionType](#)

taxType

Shows whether the tax calculation is for estimated or actual tax wherein only actual tax can be submitted.

Signature

```
global commercetax.CalculateTaxType taxType {get; set;}
```

Property Value

Type: [CalculateTaxType](#)

CalculateTaxRequest Methods

Learn more about the available methods with the `CalculateTaxRequest` class.

The `CalculateTaxRequest` class includes these methods.

[equals\(obj\)](#)

Maintains the integrity of lists of type `CalculateTaxRequest` by determining the equality of external objects in a list. This method is dynamic and is based on the `equals ()` method in Java.

[hashCode\(\)](#)

Maintains the integrity of lists of type `CalculateTaxRequest` by determining the uniqueness of the external object records in a list.

[toString\(\)](#)

Converts a value to a string.

equals (obj)

Maintains the integrity of lists of type `CalculateTaxRequest` by determining the equality of external objects in a list. This method is dynamic and is based on the `equals ()` method in Java.

Signature

```
global Boolean equals (Object obj)
```

Parameters

obj

Type: Object

External object whose key is to be validated.

Return Value

Type: Boolean

hashCode ()

Maintains the integrity of lists of type `CalculateTaxRequest` by determining the uniqueness of the external object records in a list.

Signature

```
global Integer hashCode ()
```

Return Value

Type: Integer

toString()

Converts a value to a string.

Signature

```
global String toString()
```

Return Value

Type: String

CalculateTaxResponse Class

Sets the values of the tax transaction following a response from the external tax engine. Extends the [AbstractTransactionResponse](#) class and is the top-level response class.

Namespace

[CommerceTax](#)

Example

```
if(requestType == commercetax.RequestType.CalculateTax){
    commercetax.calculatetaxtype type = request.taxtype;
    String docCode='';
    if(request.DocumentCode == 'simulateEmptyDocumentCode')
        docCode = '';
    else if(request.DocumentCode != null)
        docCode =request.DocumentCode;
    else if(request.ReferenceEntityId != null) docCode = request.ReferenceEntityId;

    else docCode = String.valueOf(getRandomInteger(0,2147483647));
    commercetax.CalculateTaxResponse response = new
commercetax.CalculateTaxResponse();
    if(request.isCommit == true) {
        response.setStatus(commercetax.TaxTransactionStatus.Committed);
    } else {
        response.setStatus(commercetax.TaxTransactionStatus.Uncommitted);
    }
    response.setDocumentCode(docCode);
    response.setReferenceDocumentCode(request.referenceDocumentCode);
    response.setTaxType(type);
    response.setStatusDescription('statusDescription');
    if(request.sellerDetails.code == 'testSellerCode') {
        response.setDescription('SellerCode fetched from TaxEngine entity');
    }
    else {
        response.setDescription('description');
    }
    response.setEffectiveDate(system.now());
    if(request.transactionDate == null) {
        response.setTransactionDate(system.now());
    }
}
```

```
    } else {
        response.setTransactionDate(request.transactionDate);
    }
    if(request.taxTransactionType == null) {
        response.setTaxTransactionType(commercetax.TaxTransactionType.Debit);
    } else {
        response.setTaxTransactionType(request.taxTransactionType);
    }
    if(request.currencyIsoCode == null || request.currencyIsoCode == '') {
        response.setCurrencyIsoCode('USD');
    } else {
        response.setCurrencyIsoCode(request.currencyIsoCode);
    }
    response.setReferenceEntityId(request.ReferenceEntityId);
}
```

[CalculateTaxResponse Methods](#)

Learn more about the available methods with the `CalculateTaxResponse` class.

CalculateTaxResponse Methods

Learn more about the available methods with the `CalculateTaxResponse` class.

The `CalculateTaxResponse` class includes these methods.

[setAddresses\(addresses\)](#)

Sets the value of the `Addresses` field using the addresses contained in an instance of the [AddressesResponse](#) class.

[setAmountDetails\(amountDetails\)](#)

Sets the value of the `AmountDetails` field using an instance of [AmountDetailsResponse](#).

[setCurrencyIsoCode\(currencyIsoCode\)](#)

Sets the value of the `CurrencyIsoCode` field of the `CalculateTaxResponse` object.

[setDescription\(dscptn\)](#)

Sets the value of the `Description` field of the `CalculateTaxResponse` object.

[setDocumentCode\(documentCode\)](#)

Sets the value of the `DocumentCode` field of the `CalculateTaxResponse` object.

[setEffectiveDate\(effectiveDate\)](#)

Sets the value of the `EffectiveDate` field of the `CalculateTaxResponse` object.

[setLineItems\(lineItems\)](#)

Sets the value of the `LineItems` field of the `CalculateTaxResponse` object.

[setReferenceDocumentCode\(referenceDocumentCode\)](#)

Sets the value of the `ReferenceDocumentCode` field of the `CalculateTaxResponse` object.

[setReferenceEntityId\(referenceEntityId\)](#)

Sets the value of the `ReferenceEntityId` field of the `CalculateTaxResponse` object.

[setStatus\(status\)](#)

Sets the value of the `Status` field of the `CalculateTaxResponse` object.

[setStatusDescription\(statusDescription\)](#)

Sets the value of the StatusDescription field of the CalculateTaxResponse object.

[setTaxTransactionId\(taxTrxnId\)](#)

Sets the value of the TaxTransactionId field of the CalculateTaxResponse object.

[setTaxTransactionType\(taxTransactionType\)](#)

Sets the value of the TaxTransactionType field of the CalculateTaxResponse object.

[setTaxType\(taxType\)](#)

Sets the value of the TaxType field of the CalculateTaxResponse object.

[setTransactionDate\(transactionDate\)](#)

Sets the value of the TransactionDate field of the CalculateTaxResponse object.

setAddresses (addresses)

Sets the value of the Addresses field using the addresses contained in an instance of the [AddressesResponse](#) class.

Signature

```
global void setAddresses (commercetax.AddressesResponse addresses)
```

Parameters

addresses

Type: [AddressesResponse](#)

Contains Ship To, Ship From, and Sold To addresses.

Return Value

Type: void

setAmountDetails (amountDetails)

Sets the value of the AmountDetails field using an instance of [AmountDetailsResponse](#).

Signature

```
global void setAmountDetails (commercetax.AmountDetailsResponse amountDetails)
```

Parameters

amountDetails

Type: [AmountDetailsResponse](#)

The tax amount details for a line item on which tax was calculated.

Return Value

Type: void

setCurrentencyIsoCode (currencyIsoCode)

Sets the value of the CurrencyIsoCode field of the CalculateTaxResponse object.

Signature

```
global void setCurrentencyIsoCode(String currencyIsoCode)
```

Parameters

currencyIsoCode

Type: String

Three-letter ISO 4217 currency code associated with a tax object.

Return Value

Type: void

setDescription (dscptn)

Sets the value of the Description field of the CalculateTaxResponse object.

Signature

```
global void setDescription(String dscptn)
```

Parameters

dscptn

Type: String

Optional description for providing more information about the calculate tax response.

Return Value

Type: void

setDocumentCode (documentCode)

Sets the value of the DocumentCode field of the CalculateTaxResponse object.

Signature

```
global void setDocumentCode(String documentCode)
```

Parameters

documentCode

Type: String

Code for a tax document that's created by the tax engine for the calculation process.

Return Value

Type: void

setEffectiveDate (effectiveDate)

Sets the value of the EffectiveDate field of the CalculateTaxResponse object.

Signature

```
global void setEffectiveDate(Datetime effectiveDate)
```

Parameters

effectiveDate

Type: Datetime

The date a tax calculation action takes effect. This parameter is optional and is provided only for recordkeeping purpose. Additionally, this parameter is used to determine the tax rates or rules and overrides the transaction date. For example, if the tax calculation request is placed on January 3 and the transaction date is January 1, you can set the effective date as January 1.

Return Value

Type: void

setLineItems (lineItems)

Sets the value of the LineItems field of the CalculateTaxResponse object.

Signature

```
global void setLineItems(List<commercetax.LineItemResponse> lineItems)
```

Parameters

lineItems

Type: List<LineItemResponse>

Response object that the tax adapter populates from the response of the external tax engine.

Return Value

Type: void

setReferenceDocumentCode (referenceDocumentCode)

Sets the value of the ReferenceDocumentCode field of the CalculateTaxResponse object.

Signature

```
global void setReferenceDocumentCode(String referenceDocumentCode)
```

Parameters

referenceDocumentCode

Type: String

Code for a reference document used in the tax calculation process.

Return Value

Type: void

setReferenceEntityId (referenceEntityId)

Sets the value of the ReferenceEntityId field of the CalculateTaxResponse object.

Signature

```
global void setReferenceEntityId(String referenceEntityId)
```

Parameters

referenceEntityId

Type: String

ID of an entity related to the line items submitted for tax calculation. For example, if order items were sent for tax calculation, you could use the ID of their parent order.

Return Value

Type: void

setStatus (status)

Sets the value of the Status field of the CalculateTaxResponse object.

Signature

```
global void setStatus(commercetax.TaxTransactionStatus status)
```

Parameters

status

Type: [TaxTransactionStatus](#)

Indicates whether a tax transaction has been committed.

Return Value

Type: void

setStatusDescription (statusDescription)

Sets the value of the StatusDescription field of the CalculateTaxResponse object.

Signature

```
global void setStatusDescription(String statusDescription)
```

Parameters

statusDescription

Type: String

Optional value for providing more information about a tax transaction's status.

Return Value

Type: void

setTaxTransactionId (taxTrxnId)

Sets the value of the TaxTransactionId field of the CalculateTaxResponse object.

Signature

```
public void setTaxTransactionId(String taxTrxnId)
```

Parameters

taxTrxnId

Type: String

The ID of the Salesforce tax transaction entity that stores information about the tax calculation transaction.

Return Value

Type: void

setTaxTransactionType (taxTransactionType)

Sets the value of the TaxTransactionType field of the CalculateTaxResponse object.

Signature

```
global void setTaxTransactionType(commercetax.TaxTransactionType taxTransactionType)
```

Parameters

taxTransactionType

Type: [TaxTransactionType](#)

Whether the tax transaction was for a credit, debit, or voided transaction.

Return Value

Type: void

setTaxType (taxType)

Sets the value of the TaxType field of the CalculateTaxResponse object.

Signature

```
global void setTaxType (commercetax.CalculateTaxType taxType)
```

Parameters

taxType

Type: [CalculateTaxType](#)

Indicates whether a tax calculation request is for estimated or actual tax.

Return Value

Type: void

setTransactionDate (transactionDate)

Sets the value of the TransactionDate field of the CalculateTaxResponse object.

Signature

```
global void setTransactionDate (Datetime transactionDate)
```

Parameters

transactionDate

Type: [Datetime](#)

The date that the tax transaction occurred.

Return Value

Type: void

CalculateTaxType Enum

Shows whether a tax calculation request is for estimated or actual tax.

Usage

Used by the [CalculateTaxRequest](#) and [CalculateTaxResponse](#) class methods.

Enum Values

The `commercetax.CalculateTaxType` enum includes these values.

Value	Description
Actual	Specifies that the tax calculation service should calculate the finalized (actual) tax for the requested line items.
Estimated	Specifies that the tax calculation service should estimate the tax for the requested line items.

CustomTaxAttributesResponse Class

Sets additional data or custom attributes in the tax response.

Namespace

[CommerceTax](#)

[CustomTaxAttributesResponse Constructors](#)

Learn more about the available constructors with the `CustomTaxAttributesResponse` class.

[CustomTaxAttributesResponse Methods](#)

Learn more about the available methods with the `CustomTaxAttributesResponse` class.

CustomTaxAttributesResponse Constructors

Learn more about the available constructors with the `CustomTaxAttributesResponse` class.

The `CustomTaxAttributesResponse` class includes these constructors.

[CustomTaxAttributesResponse\(\)](#)

Constructor to set additional data or custom attributes in the tax response.

CustomTaxAttributesResponse ()

Constructor to set additional data or custom attributes in the tax response.

Signature

```
global CustomTaxAttributesResponse ()
```

CustomTaxAttributesResponse Methods

Learn more about the available methods with the `CustomTaxAttributesResponse` class.

The `CustomTaxAttributesResponse` class includes these methods.

[setData\(data\)](#)

Sets additional data or custom attributes in the tax response.

setData (data)

Sets additional data or custom attributes in the tax response.

Signature

```
global void setData (Map<String, Object> data)
```

Parameters

data

Type: Map<String, Object>

Additional data or custom attributes to be included in the tax response.

Return Value

Type: void

ErrorResponse Class

Use to respond with an error after receiving errors from the PaymentGatewayAdapter methods of the [CommercePayments](#) namespace, such as request-forbidden responses, custom validation errors, or expired API tokens.

Namespace

[CommerceTax](#)

Example

This example snippet of a mock tax adapter shows a hypothetical scenario to demo an error response. The adapter receives request information from `TaxEngineContext` and stores it in an instance of `CalculateTaxRequest`. If the request's `documentCode` property is null or indicates an error, the adapter returns an error response with information about the error.

```
global virtual class MockAdapter implements commercetax.TaxEngineAdapter {

    global commercetax.TaxEngineResponse processRequest (commercetax.TaxEngineContext
taxEngineContext) {
        commercetax.RequestType requestType = taxEngineContext.getRequestType();
        commercetax.CalculateTaxRequest request =
(commercetax.CalculateTaxRequest) taxEngineContext.getRequest();

        if (request.documentCode == null) {
            return new commercetax.ErrorResponse (commercetax.resultcode.TaxEngineError,
'404', 'documentCode is mandatory');
        }
        if (request.documentCode == 'TaxEngineError') {
            return new commercetax.ErrorResponse (commercetax.resultcode.TaxEngineError,
'504', 'documentCode - not supported');
        }
        if (request.documentCode == 'simulateValidationFailureInAdapter') {
            return new commercetax.ErrorResponse (commercetax.resultcode.TaxEngineError,
```

```
'400', 'validations for documentCode failed in adapter');
    }
    if(request.documentCode == 'simulateMalformedErrorInAdapter') {
        return new
commercetax.ErrorResponse(commercetax.resultcode.TaxEngineError, null, 'malformed adapter
error response');
    }
    if(request.documentCode == 'simulateTaxEngineProcessFailure') {
        return new commercetax.ErrorResponse(commercetax.resultcode.TaxEngineError,
'500', 'Tax Engine couldnt process your request');
    }
}
```

[ErrorResponse Constructors](#)

Learn more about the available constructors with the `ErrorResponse` class.

ErrorResponse Constructors

Learn more about the available constructors with the `ErrorResponse` class.

The `ErrorResponse` class includes these constructors.

[ErrorResponse\(resultCode, errorCode, errorMessage\)](#)

Constructor to initialize an `ErrorResponse` object from the result code, error code, and error message sent from the tax engine.

ErrorResponse(resultCode, errorCode, errorMessage)

Constructor to initialize an `ErrorResponse` object from the result code, error code, and error message sent from the tax engine.

Signature

```
global ErrorResponse(commercetax.ResultCode resultCode, String errorCode, String
errorMessage)
```

Parameters

resultCode

Type: [ResultCode](#)

Code for the type of result sent by the tax engine.

errorCode

Type: String

Code for the type of error sent by the tax engine.

Codes must match the HTTP status codes to be returned to the user. Here are a few examples:

- If the status code is for a bad request, set `errorCode` to 400.
- If the status code is for a forbidden request, set `errorCode` to 403.
- If `errorCode` isn't a valid HTTP status code, a 500 internal server error is returned.

errorMessage

Type: String

The error message sent by the tax engine.

HeaderTaxAddressesRequest Class

Captures the address values that are applicable for the quote or order transaction.

Namespace

[CommerceTax](#)

[HeaderTaxAddressesRequest Constructors](#)

Learn more about the constructors available with the `HeaderTaxAddressesRequest` class.

[HeaderTaxAddressesRequest Properties](#)

Learn more about the available properties with the `HeaderTaxAddressesRequest` class.

[HeaderTaxAddressesRequest Methods](#)

Learn more about the available methods with the `HeaderTaxAddressesRequest` class.

HeaderTaxAddressesRequest Constructors

Learn more about the constructors available with the `HeaderTaxAddressesRequest` class.

The `HeaderTaxAddressesRequest` class includes these constructors.

[HeaderTaxAddressesRequest\(shipFrom, shipTo, soldTo, billTo, taxEngineAddress\)](#)

Constructor for initializing the required addresses of the tax addresses request such as the ship from, ship to, sold to, and bill to addresses. This constructor is intended for test usage and throws an exception if used outside of the Apex test context.

`HeaderTaxAddressesRequest(shipFrom, shipTo, soldTo, billTo, taxEngineAddress)`

Constructor for initializing the required addresses of the tax addresses request such as the ship from, ship to, sold to, and bill to addresses. This constructor is intended for test usage and throws an exception if used outside of the Apex test context.

Signature

```
global HeaderTaxAddressesRequest (commercetax.TaxAddressRequest shipFrom,
commercetax.TaxAddressRequest shipTo, commercetax.TaxAddressRequest soldTo,
commercetax.TaxAddressRequest billTo, commercetax.TaxAddressRequest taxEngineAddress)
```

Parameters

shipFrom

Type: [TaxAddressRequest](#)

Address where a line item was shipped from.

shipTo

Type: [TaxAddressRequest](#)

Address where a line item was shipped to.

soldTo

Type: [TaxAddressRequest](#)

Address of the line item's buyer.

billTo

Type: [TaxAddressRequest](#)

Person or group who was billed for the line item.

taxEngineAddress

Type: [TaxAddressRequest](#)

Address that the tax engine uses to calculate tax.

HeaderTaxAddressesRequest Properties

Learn more about the available properties with the `HeaderTaxAddressesRequest` class.

The `HeaderTaxAddressesRequest` class includes these properties.

[billTo](#)

Specifies the `billTo` address for a line item on which tax was calculated.

[shipFrom](#)

Specifies the `shipFrom` address for a line item on which tax was calculated.

[shipTo](#)

Specifies the `shipTo` address for a line item on which tax was calculated.

[soldTo](#)

Specifies the `soldTo` address for a line item on which tax was calculated.

[taxEngineAddress](#)

Address used by the tax engine when calculating tax for a line item.

billTo

Specifies the `billTo` address for a line item on which tax was calculated.

Signature

```
global commercetax.TaxAddressRequest billTo {get; set;}
```

Property Value

Type: [TaxAddressRequest](#)

shipFrom

Specifies the `shipFrom` address for a line item on which tax was calculated.

Signature

```
global commercetax.TaxAddressRequest shipFrom {get; set;}
```

Property Value

Type: [TaxAddressRequest](#)

shipTo

Specifies the shipTo address for a line item on which tax was calculated.

Signature

```
global commercetax.TaxAddressRequest shipTo {get; set;}
```

Property Value

Type: [TaxAddressRequest](#)

soldTo

Specifies the soldTo address for a line item on which tax was calculated.

Signature

```
global commercetax.TaxAddressRequest soldTo {get; set;}
```

Property Value

Type: [TaxAddressRequest](#)

taxEngineAddress

Address used by the tax engine when calculating tax for a line item.

Signature

```
global commercetax.TaxAddressRequest taxEngineAddress {get; set;}
```

Property Value

Type: [TaxAddressRequest](#)

HeaderTaxAddressesRequest Methods

Learn more about the available methods with the `HeaderTaxAddressesRequest` class.

The `HeaderTaxAddressesRequest` class includes these methods.

[equals\(obj\)](#)

Maintains the integrity of lists of type `HeaderTaxAddressesRequest` by determining the equality of external objects in a list. This method is dynamic and is based on the `equals ()` method in Java.

[hashCode\(\)](#)

Maintains the integrity of lists of type `TaxAddressesRequest` by determining the uniqueness of the external objects in a list.

[toString\(\)](#)

Converts a value to a string.

equals (obj)

Maintains the integrity of lists of type `HeaderTaxAddressesRequest` by determining the equality of external objects in a list. This method is dynamic and is based on the `equals ()` method in Java.

Signature

```
global Boolean equals (Object obj)
```

Parameters

obj

Type: Object

External object whose key is to be validated.

Return Value

Type: Boolean

hashCode ()

Maintains the integrity of lists of type `TaxAddressesRequest` by determining the uniqueness of the external objects in a list.

Signature

```
global Integer hashCode ()
```

Return Value

Type: Integer

toString ()

Converts a value to a string.

Signature

```
global String toString ()
```

Return Value

Type: String

ImpositionResponse Class

Stores details of tax impositions from the external tax engine.

Namespace

[CommerceTax](#)

Example

In this mock adapter example, the adapter sets the `TaxDetailsResponse.setImposition()` method parameter to null if the request's document code indicates that the tax calculation didn't require any exceptions. Otherwise, it creates an instance of `ImpositionResponse` and sets its `SubType` and `Type` values, and then assigns it to `TaxDetailsResponse`.

```
if(request.DocumentCode == 'SetsNullForResponseWithoutException'){
    taxDetailsResponse.setImposition(null);
}else{
    commercetax.ImpositionResponse imposition = new
commercetax.ImpositionResponse();
    imposition.setSubType('subtype');
    imposition.setType('type');
    taxDetailsResponse.setImposition(imposition);
}
```

[ImpositionResponse Methods](#)

Learn more about the available methods with the `ImpositionResponse` class.

ImpositionResponse Methods

Learn more about the available methods with the `ImpositionResponse` class.

The `ImpositionResponse` class includes these methods.

[setId\(id\)](#)

Sets the ID field of the `ImpositionResponse` class.

[setName\(name\)](#)

Sets the Name field of the `ImpositionResponse` class.

[setSubType\(subType\)](#)

Sets the SubType field of the `ImpositionResponse` class.

[setType\(type\)](#)

Sets the Type field of the `ImpositionResponse` class.

setId(id)

Sets the ID field of the `ImpositionResponse` class.

Signature

```
global void setId(String id)
```

Parameters

id

Type: String

User-defined ID value used for referencing the tax imposition.

Return Value

Type: void

setName (name)

Sets the Name field of the `ImpositionResponse` class.

Signature

```
global void setName(String name)
```

Parameters

name

Type: String

Optional user-defined name for the tax imposition response.

Return Value

Type: void

setSubType (subType)

Sets the SubType field of the `ImpositionResponse` class.

Signature

```
global void setSubType(String subType)
```

Parameters

subType

Type: String

Many tax calculation organizations use types and subtypes to categorize their tax imposition procedures. If the tax engine you use follows this process, set the subtype with this parameter.

Return Value

Type: void

setType (type)

Sets the Type field of the `ImpositionResponse` class.

Signature

```
public void setType(String type)
```

Parameters

`type`

Type: String

Many tax calculation organizations use types and subtypes to categorize their tax imposition procedures. If the tax engine you use follows this process, set the type with this parameter.

Return Value

Type: void

JurisdictionResponse Class

Stores details from the external tax engine about the tax jurisdiction used in the tax calculation process. A tax jurisdiction represents a government entity that collects tax.

Namespace

[CommerceTax](#)

Example

In this mock adapter example, the adapter sets the `TaxDetailsResponse.setJurisdiction()` method parameter to null if the request's document code indicates that the tax calculation didn't require any exceptions. Otherwise, it creates an instance of `JurisdictionResponse` and sets its address values. Because this code represents a mock adapter, the example defines the address parameters directly. In a standard implementation, the jurisdiction's setters receive values passed from the external tax engine.

```
if(request.DocumentCode == 'SetsNullForResponseWithoutException'){
    taxDetailsResponse.setJurisdiction(null);
}else{
    commercetax.JurisdictionResponse jurisdiction = new
commercetax.JurisdictionResponse();
    jurisdiction.setCountry('country');
    jurisdiction.setRegion('region');
    jurisdiction.setName('name');
    jurisdiction.setStateAssignedNumber('stateAssignedNo');
    jurisdiction.setId('id');
    jurisdiction.setLevel('level');
    taxDetailsResponse.setJurisdiction(jurisdiction);
}
```

[JurisdictionResponse Methods](#)

Learn more about the available methods with the `JurisdictionResponse` class.

JurisdictionResponse Methods

Learn more about the available methods with the `JurisdictionResponse` class.

The `JurisdictionResponse` class includes these methods.

[setCountry\(country\)](#)

Sets the Country field of the `JurisdictionResponse` class.

[setId\(id\)](#)

Sets the ID field of the `JurisdictionResponse` class.

[setLevel\(level\)](#)

Sets the Level field of the `JurisdictionResponse` class.

[setName\(name\)](#)

Sets the Name field of the `JurisdictionResponse` class.

[setRegion\(region\)](#)

Sets the Region value of the `JurisdictionResponse` class.

[setStateAssignedNumber\(stateAssignedNo\)](#)

Sets the StateAssignedNumber field of the `JurisdictionResponse` class.

setCountry(country)

Sets the Country field of the `JurisdictionResponse` class.

Signature

```
global void setCountry(String country)
```

Parameters

country

Type: String

The country of the tax jurisdiction entity's address.

Return Value

Type: void

setId(id)

Sets the ID field of the `JurisdictionResponse` class.

Signature

```
global void setId(String id)
```

Parameters

id

Type: String

User-defined Id value used to reference the jurisdiction response.

Return Value

Type: void

setLevel (level)Sets the Level field of the `JurisdictionResponse` class.

Signature

```
global void setLevel (String level)
```

Parameters

level

Type: String

Level value used in the jurisdiction entity's address.

Return Value

Type: void

setName (name)Sets the Name field of the `JurisdictionResponse` class.

Signature

```
global void setName (String name)
```

Parameters

name

Type: String

Optional user-defined name field for referencing the jurisdiction response.

Return Value

Type: void

setRegion (region)Sets the Region value of the `JurisdictionResponse` class.

Signature

```
global void setRegion(String region)
```

Parameters

region

Type: String

Region value used in the tax jurisdiction entity's address.

Return Value

Type: void

setStateAssignedNumber (stateAssignedNo)

Sets the StateAssignedNumber field of the `JurisdictionResponse` class.

Signature

```
global void setStateAssignedNumber(String stateAssignedNo)
```

Parameters

stateAssignedNo

Type: String

State assigned number value of the tax jurisdiction entity's address.

Return Value

Type: void

LineItemResponse Class

Response class that stores details of a list of one or more line items on which the tax engine has calculated tax.

Namespace

[CommerceTax](#)

Example

This example uses a `LineItemResponse` list to store information about each line item that was processed as part of the request. For simplicity, the sample code uses a static value of 1 for the tax rate. However, most integrations typically have a more complex process for determining a tax rate. Most integrations also build a `TaxDetailsResponse` list to store the actual tax value information that they assign to each line item in the `LineItemResponse` list.

```
Double totalTax = 0.0;
    Double totalAmount = 0.0;
    List<commercetax.LineItemResponse> lineItemResponses = new
List<commercetax.LineItemResponse> ();
```

```

        for(Commercetax.TaxLineItemRequest lineItem : request.lineItems){
            commercetax.AddressesResponse addressesRes = new
commercetax.AddressesResponse();
            if(request.DocumentCode == 'SetsNullForResponseWithoutException'){
                addressesRes.setShipFrom(null);
                addressesRes.setShipTO(null);
                addressesRes.setSoldTo(null);
            }else{
                commercetax.AddressResponse addRes = new commercetax.AddressResponse();

                addRes.setLocationCode('locationCode');
                addressesRes.setShipFrom(addRes);
                addressesRes.setShipTO(addRes);
                addressesRes.setSoldTo(addRes);
            }
            commercetax.LineItemResponse lineItemResponse = new
commercetax.LineItemResponse();
            Double totalLineTax = 0;
            List<commercetax.TaxDetailsResponse> taxDetailsResponses = new
List<commercetax.TaxDetailsResponse>();
            for(integer i =0;i<1;i++){
                Integer rate = 1;
                Double taxableAmount = lineItem.amount;
                commercetax.TaxDetailsResponse taxDetailsResponse = new
commercetax.TaxDetailsResponse();
                taxDetailsResponse.setRate(Double.valueOf(rate));
                taxDetailsResponse.setTaxableAmount(taxableAmount);
                Double tax = taxableAmount*rate;
                totalLineTax+=tax;
                taxDetailsResponse.setTax(taxableAmount*rate);
                taxDetailsResponse.setExemptAmount(0);
                taxDetailsResponse.setExemptReason('exemptReason');
                taxDetailsResponse.setTaxRegionId('taxRegionId');

taxDetailsResponse.setTaxId(String.valueOf(getRandomInteger(0,2323233)));
                taxDetailsResponse.setSerCode('serCode');
                taxDetailsResponse.setTaxAuthorityTypeId('taxAuthorityTypeId');
                if(request.DocumentCode == 'SetsNullForResponseWithoutException'){
                    taxDetailsResponse.setImposition(null);
                }else{
                    commercetax.ImpositionResponse imposition = new
commercetax.ImpositionResponse();
                    imposition.setSubType('subtype');
                    imposition.setType('type');
                    taxDetailsResponse.setImposition(imposition);
                }

                if(request.DocumentCode == 'SetsNullForResponseWithoutException'){
                    taxDetailsResponse.setJurisdiction(null);
                }else{
                    commercetax.JurisdictionResponse jurisdiction = new
commercetax.JurisdictionResponse();
                    jurisdiction.setCountry('country');
                    jurisdiction.setRegion('region');
                }
            }
        }
    }
}

```

```
        jurisdiction.setName('name');
        jurisdiction.setStateAssignedNumber('stateAssignedNo');
        jurisdiction.setId('id');
        jurisdiction.setLevel('level');
        taxDetailsResponse.setJurisdiction(jurisdiction);
    }

    taxDetailsResponses.add(taxDetailsResponse);
}
lineItemResponse.setTaxes(taxDetailsResponses);
totalTax +=totalLineTax;
totalAmount+=lineItem.amount;
```

[LineItemResponse Methods](#)

Learn more about the available methods with the `LineItemResponse` class.

LineItemResponse Methods

Learn more about the available methods with the `LineItemResponse` class.

The `LineItemResponse` class includes these methods.

[setAddresses\(addresses\)](#)

Sets the `Addresses` field on the `LineItemResponse` using an instance of `AddressesResponse` class.

[setAmountDetails\(amountDetails\)](#)

Sets the `AmountDetails` field on the `LineItemResponse` using an instance of `AmountDetails`.

[setCustomTaxAttributes\(customTaxAttributes\)](#)

Uses an instance of `CustomTaxAttributesResponse` class to include additional attributes in the tax response at line item level.

[setEffectiveDate\(effectiveDate\)](#)

Sets the `EffectiveDate` field on the `LineItemResponse` class. Effective Date fields are optional fields that store the date that a transaction takes effect. We provide these fields only for recordkeeping purposes – for example, if you must report an effective date to an external general ledger system. Salesforce doesn't use them to calculate any tax or payment values.

[setIsTaxable\(isTaxable\)](#)

Sets the `IsTaxable` field on the `LineItemResponse` class.

[setLineNumber\(lineNumber\)](#)

Sets the `LineNumber` field on the `LineItemResponse` class.

[setProductCode\(productCode\)](#)

Sets the `ProductCode` field on the `LineItemResponse` class.

[setQuantity\(quantity\)](#)

Sets the `Quantity` field on the `LineItemResponse` class.

[setTaxCode\(taxCode\)](#)

Sets the `TaxCode` field on the `LineItemResponse`.

[setTaxes\(taxes\)](#)

Sets the `Taxes` field on a `LineItemResponse`.

setAddresses (addresses)

Sets the Addresses field on the `LineItemResponse` using an instance of `AddressesResponse` class.

Signature

```
global void setAddresses (commercetax.AddressesResponse addresses)
```

Parameters

addresses

Type: [AddressesResponse](#)

Class that contains methods to set the Ship To, Ship From, and Sold To address information.

Return Value

Type: void

setAmountDetails (amountDetails)

Sets the Amount Details field on the `LineItemResponse` using an instance of `AmountDetails`.

Signature

```
global void setAmountDetails (commercetax.AmountDetailsResponse amountDetails)
```

Parameters

amountDetails

Type: [AmountDetailsResponse](#)

Class that contains methods to set the tax amount, total amount with tax, total amount, and exempt amount.

Return Value

Type: void

setCustomTaxAttributes (customTaxAttributes)

Uses an instance of `CustomTaxAttributesResponse` class to include additional attributes in the tax response at line item level.

Signature

```
global void setCustomTaxAttributes (commercetax.CustomTaxAttributesResponse  
customTaxAttributes)
```

Parameters

customTaxAttributes

Type: [CustomTaxAttributesResponse](#)

Additional data or custom attributes to include in the tax response.

Return Value

Type: void

setEffectiveDate (effectiveDate)

Sets the EffectiveDate field on the `LineItemResponse` class. Effective Date fields are optional fields that store the date that a transaction takes effect. We provide these fields only for recordkeeping purposes – for example, if you must report an effective date to an external general ledger system. Salesforce doesn't use them to calculate any tax or payment values.

Signature

```
global void setEffectiveDate(Datetime effectiveDate)
```

Parameters

effectiveDate

Type: Datetime

Optional field that stores the date that a transaction takes effect.

Return Value

Type: void

setIsTaxable (isTaxable)

Sets the IsTaxable field on the `LineItemResponse` class.

Signature

```
global void setIsTaxable(Boolean isTaxable)
```

Parameters

isTaxable

Type: Boolean

Whether line items were taxed as part of the tax calculation request.

Return Value

Type: void

setLineNumber (lineNumber)

Sets the LineNumber field on the `LineItemResponse` class.

Signature

```
global void setLineNumber(String lineNumber)
```

Parameters

lineNumber

Type: String

User-defined number used to identify a line item.

Return Value

Type: void

setProductCode (productCode)Sets the ProductCode field on the `LineItemResponse` class.

Signature

```
global void setProductCode (String productCode)
```

Parameters

productCode

Type: String

Code for the product that a line item represents.

Return Value

Type: void

setQuantity (quantity)Sets the Quantity field on the `LineItemResponse` class.

Signature

```
global void setQuantity (Double quantity)
```

Parameters

quantity

Type: Double

Quantity of a line item.

Return Value

Type: void

setTaxCode (taxCode)Sets the TaxCode field on the `LineItemResponse`.

Signature

```
global void setTaxCode (String taxCode)
```

Parameters

taxCode

Type: String

Federal code that an individual or business uses to pay their taxes to a federal or state government. The tax engine uses this code during the tax calculation process.

Return Value

Type: void

setTaxes (taxes)

Sets the Taxes field on a `LineItemResponse`.

Signature

```
global void setTaxes (List<commercetax.TaxDetailsResponse> taxes)
```

Parameters

taxes

Type: List<[TaxDetailsResponse](#)>

Tax values applied to a line item in the `LineItemResponse` list. This information is stored in a list of `TaxDetailsResponses`, which contains values such as tax, taxable amount, and tax rate.

Return Value

Type: void

LineTaxAddressesRequest Class

Stores details of the addresses applied per line item in a tax calculation request.

Namespace

[CommerceTax](#)

[LineTaxAddressesRequest Constructors](#)

Learn more about the constructors available with the `LineTaxAddressesRequest` class.

[LineTaxAddressesRequest Properties](#)

Learn more about the available properties with the `LineTaxAddressesRequest` class.

[LineTaxAddressesRequest Methods](#)

Learn more about the available methods with the `LineTaxAddressesRequest` class.

LineTaxAddressesRequest Constructors

Learn more about the constructors available with the `LineTaxAddressesRequest` class.

The `LineTaxAddressesRequest` class includes these constructors.

[LineTaxAddressesRequest\(shipFrom, shipTo, soldTo, billTo, taxEngineAddress\)](#)

Constructor for initializing the required addresses for a line item of the tax addresses request such as the ship to, ship from, and bill to addresses. This constructor is intended for test usage and throws an exception if used outside of the Apex test context.

LineTaxAddressesRequest(shipFrom, shipTo, soldTo, billTo, taxEngineAddress)

Constructor for initializing the required addresses for a line item of the tax addresses request such as the ship to, ship from, and bill to addresses. This constructor is intended for test usage and throws an exception if used outside of the Apex test context.

Signature

```
global LineTaxAddressesRequest (commercetax.TaxAddressRequest shipFrom,  
commercetax.TaxAddressRequest shipTo, commercetax.TaxAddressRequest soldTo,  
commercetax.TaxAddressRequest billTo, commercetax.TaxAddressRequest taxEngineAddress)
```

Parameters

shipFrom

[TaxAddressRequest](#)

Address where a line item was shipped from.

shipTo

[TaxAddressRequest](#)

Address where a line item is shipped to.

soldTo

[TaxAddressRequest](#)

Address of the line item's buyer.

billTo

[TaxAddressRequest](#)

Person or group who was billed for the line item.

taxEngineAddress

[TaxAddressRequest](#)

Address that the tax engine uses to calculate tax.

LineTaxAddressesRequest Properties

Learn more about the available properties with the `LineTaxAddressesRequest` class.

The `LineTaxAddressesRequest` class includes these properties.

[billTo](#)

The Bill To address for a line item.

[shipFrom](#)

The Ship From address for a line item.

[shipTo](#)

The Ship To address for a line item.

[soldTo](#)

The Sold To address for a line item.

billTo

The Bill To address for a line item.

Signature

```
global commercetax.TaxAddressRequest billTo {get; set;}
```

Property Value

Type: [TaxAddressRequest](#)

shipFrom

The Ship From address for a line item.

Signature

```
global commercetax.TaxAddressRequest shipFrom {get; set;}
```

Property Value

Type: [TaxAddressRequest](#)

shipTo

The Ship To address for a line item.

Signature

```
global commercetax.TaxAddressRequest shipTo {get; set;}
```

Property Value

Type: [TaxAddressRequest](#)

soldTo

The Sold To address for a line item.

Signature

```
global commercetax.TaxAddressRequest soldTo {get; set;}
```

Property Value

Type: [TaxAddressRequest](#)

LineTaxAddressesRequest Methods

Learn more about the available methods with the `LineTaxAddressesRequest` class.

The `LineTaxAddressesRequest` class includes these methods.

[equals\(obj\)](#)

Maintains the integrity of lists of type `LineTaxAddressesRequest` by determining the equality of external objects in a list. This method is dynamic and is based on the `equals ()` method in Java.

[hashCode\(\)](#)

Maintains the integrity of lists of type `LineTaxAddressesRequest` by determining the uniqueness of the external object records in a list.

[toString\(\)](#)

Converts a value to a string.

equals (obj)

Maintains the integrity of lists of type `LineTaxAddressesRequest` by determining the equality of external objects in a list. This method is dynamic and is based on the `equals ()` method in Java.

Signature

```
global Boolean equals (Object obj)
```

Parameters

obj

Type: Object

External object whose key is to be validated.

Return Value

Type: Boolean

hashCode ()

Maintains the integrity of lists of type `LineTaxAddressesRequest` by determining the uniqueness of the external object records in a list.

Signature

```
global Integer hashCode ()
```

Return Value

Type: Integer

toString ()

Converts a value to a string.

Signature

```
global String toString ()
```

Return Value

Type: String

RequestType Enum

Shows the type of tax request made to the tax engine.

Usage

Used by the [TaxEngineContext](#) class method.

Enum Values

The `commercetax.RequestType` enum includes these values.

Value	Description
<code>CalculateTax</code>	Represents a request to calculate tax on a list of taxable line items.

ResultCode Enum

Code that represents the results of a tax request made to the tax engine.

Usage

Used by the [ErrorResponse](#) class method.

Enum Values

The `commercetax.ResultCode` enum includes these values.

Value	Description
<code>TaxEngineError</code>	Represents an error that occurred during the tax request process.
<code>ReferenceDocumentCodeMissing</code>	Specifies if the document mentioned as a <code>referenceDocumentCode</code> value isn't available in the tax engine.

RuleDetailsResponse Class

Contains details about the tax rules used for tax calculation.

Namespace

[CommerceTax](#)

[RuleDetailsResponse Methods](#)

Learn more about the available methods with the `RuleDetailsResponse` class.

RuleDetailsResponse Methods

Learn more about the available methods with the `RuleDetailsResponse` class.

The `RuleDetailsResponse` includes these methods.

[RuleDetailsResponse\(\)](#)

Contains information about the tax rules used when calculating tax for line items.

[setNonTaxableRuleId\(nonTaxableRuleId\)](#)

Sets the `NonTaxableRuleId` field of the `RuleDetailsResponse`.

[setNonTaxableType\(nonTaxableType\)](#)

Sets the `NonTaxableType` field of the `RuleDetailsResponse`.

[setRateRuleId\(rateRuleId\)](#)

Sets the `RateRuleId` field of the `RuleDetailsResponse`.

[setRateSourceId\(rateSourceId\)](#)

Sets the `RateSourceId` field on the `RuleDetailsResponse`.

RuleDetailsResponse ()

Contains information about the tax rules used when calculating tax for line items.

Signature

```
global void RuleDetailsResponse()
```

Return Value

Type: void

setNonTaxableRuleId (nonTaxableRuleId)

Sets the `NonTaxableRuleId` field of the `RuleDetailsResponse`.

Signature

```
global void setNonTaxableRuleId(String nonTaxableRuleId)
```

Parameters

nonTaxableRuleId

Type: String

ID of the tax rule applied to non-taxable line items.

Return Value

Type: void

setNonTaxableType (nonTaxableType)

Sets the NonTaxableType field of the RuleDetailsResponse.

Signature

```
global void setNonTaxableType(String nonTaxableType)
```

Parameters

nonTaxableType

Type: String

Reason (from several possible types) that a line item is non-taxable.

Return Value

Type: void

setRateRuleId (rateRuleId)

Sets the RateRuleId field of the RuleDetailsResponse.

Signature

```
global void setRateRuleId(String rateRuleId)
```

Parameters

rateRuleId

Type: String

ID of the tax rule used to determine a tax rate.

Return Value

Type: void

setRateSourceId (rateSourceId)

Sets the RateSourceId field on the RuleDetailsResponse.

Signature

```
global void setRateSourceId(String rateSourceId)
```

Parameters

rateSourceId

Type: String

ID of the source object used for calculating tax rate.

Return Value

Type: void

TaxAddressesRequest Class

Contains methods to get and set tax address values.

Namespace

[CommerceTax](#)[TaxAddressesRequest Constructors](#)Learn more about the available constructors with the `TaxAddressesRequest` class.[TaxAddressesRequest Properties](#)Learn more about the available properties with the `TaxAddressesRequest` class.[TaxAddressesRequest Methods](#)Learn more about the available methods with the `TaxAddressesRequest` class.

TaxAddressesRequest Constructors

Learn more about the available constructors with the `TaxAddressesRequest` class.The `TaxAddressesRequest` class includes these constructors.[TaxAddressesRequest\(shipFrom, shipTo, soldTo, billTo, taxEngineAddress\)](#)

Constructor for defining addresses for the tax addresses request. This constructor is intended for test usage and throws an exception if used outside of the Apex test context.

`TaxAddressesRequest(shipFrom, shipTo, soldTo, billTo, taxEngineAddress)`

Constructor for defining addresses for the tax addresses request. This constructor is intended for test usage and throws an exception if used outside of the Apex test context.

Signature

```
global TaxAddressesRequest (commercetax.TaxAddressRequest shipFrom,  
commercetax.TaxAddressRequest shipTo, commercetax.TaxAddressRequest soldTo,  
commercetax.TaxAddressRequest billTo, commercetax.TaxAddressRequest taxEngineAddress)
```

Parameters

shipFrom[TaxAddressRequest](#)

The address where a line item was shipped from.

shipTo[TaxAddressRequest](#)

The address where a line item is shipped to.

soldTo[TaxAddressRequest](#)

The address of the line item's buyer.

billTo[TaxAddressRequest](#)

The person or group who was billed for the line item.

taxEngineAddress[TaxAddressRequest](#)

The address that the tax engine uses to calculate tax.

TaxAddressesRequest Properties

Learn more about the available properties with the `TaxAddressesRequest` class.

The `TaxAddressesRequest` class includes these properties.

[billTo](#)

The Bill To address for a line item.

[shipFrom](#)

The Ship From address for a line item.

[shipTo](#)

The Ship To address for a line item.

[soldTo](#)

The Sold To address for a line item.

[taxEngineAddress](#)

The Tax Engine Address for a line item.

billTo

The Bill To address for a line item.

Signature

```
global commercetax.TaxAddressRequest billTo {get; set;}
```

Property Value

[TaxAddressRequest](#)

shipFrom

The Ship From address for a line item.

Signature

```
global commercetax.TaxAddressRequest shipFrom {get; set;}
```

Property Value

[TaxAddressRequest](#)

shipTo

The Ship To address for a line item.

Signature

```
public commercetax.TaxAddressRequest shipTo {get; set;}
```

Property Value

[TaxAddressRequest](#)

soldTo

The Sold To address for a line item.

Signature

```
global commercetax.TaxAddressRequest soldTo {get; set;}
```

Property Value

[TaxAddressRequest](#)

taxEngineAddress

The Tax Engine Address for a line item.

Signature

```
global commercetax.TaxAddressRequest taxEngineAddress {get; set;}
```

Property Value

[TaxAddressRequest](#)

TaxAddressesRequest Methods

Learn more about the available methods with the `TaxAddressesRequest` class.

The `TaxAddressesRequest` class includes these methods.

`equals(obj)`

Maintains the integrity of lists of type `TaxAddressesRequest` by determining the equality of external objects in a list. This method is dynamic and is based on the `equals ()` method in Java.

`hashCode()`

Maintains the integrity of lists of type `TaxAddressesRequest` by determining the uniqueness of the external object records in a list.

`toString()`

Converts a value to a string.

`equals (obj)`

Maintains the integrity of lists of type `TaxAddressesRequest` by determining the equality of external objects in a list. This method is dynamic and is based on the `equals ()` method in Java.

Signature

```
global Boolean equals (Object obj)
```

Parameters

obj

Type: Object

External object whose key is to be validated.

Return Value

Type: Boolean

`hashCode ()`

Maintains the integrity of lists of type `TaxAddressesRequest` by determining the uniqueness of the external object records in a list.

Signature

```
global Integer hashCode ()
```

Return Value

Type: Integer

`toString ()`

Converts a value to a string.

Signature

```
global String toString()
```

Return Value

Type: String

TaxAddressRequest Class

Contains address details used for tax calculation.

Namespace

[CommerceTax](#)

[TaxAddressRequest Constructors](#)

Learn more about the available constructors with the `TaxAddressRequest` class.

[TaxAddressRequest Properties](#)

Learn more about the available properties with the `TaxAddressRequest` class.

[TaxAddressRequest Methods](#)

Learn more about the available methods with the `TaxAddressRequest` class.

TaxAddressRequest Constructors

Learn more about the available constructors with the `TaxAddressRequest` class.

The `TaxAddressRequest` class includes these constructors.

[TaxAddressRequest\(city, country, latitude, longitude, postalCode, state, street, locationCode\)](#)

Initializes the `TaxAddressRequest` object using address details. This constructor is intended for test usage and throws an exception if used outside of the Apex test context.

TaxAddressRequest(city, country, latitude, longitude, postalCode, state, street, locationCode)

Initializes the `TaxAddressRequest` object using address details. This constructor is intended for test usage and throws an exception if used outside of the Apex test context.

Signature

```
global TaxAddressRequest(String city, String country, Double latitude, Double longitude, String postalCode, String state, String street, String locationCode)
```

Parameters

city

Type: String

City used in an address, which is required for tax calculation.

country

Type: String

Country used in an address, which is required for tax calculation.

latitude

Type: Double

Latitude used in an address, which is required for tax calculation.

longitude

Type: Double

Longitude used in an address, which is required for tax calculation.

postalCode

Type: String

Postal code used in an address, which is required for tax calculation.

state

Type: String

State used in an address, which is required for tax calculation.

street

Type: String

Street used in an address, which is required for tax calculation.

locationCode

Type: String

Location code used in an address, which is required for tax calculation.

TaxAddressRequest Properties

Learn more about the available properties with the `TaxAddressRequest` class.

The `TaxAddressRequest` class includes these properties.

[city](#)

City used in an address, which is required for tax calculation.

[country](#)

Country used in an address, which is required for tax calculation.

[countryCode](#)

Country code used in an address, which is required for tax calculation.

[latitude](#)

Latitude used in an address, which is required for tax calculation.

[locationCode](#)

Location code used in an address, which is required for tax calculation.

[longitude](#)

Longitude used in an address, which is required for tax calculation.

[postalCode](#)

Postal code used in an address, which is required for tax calculation.

state

State used in an address, which is required for tax calculation.

stateCode

State code used in an address, which is required for tax calculation.

street

Street used in an address, which is required for tax calculation.

city

City used in an address, which is required for tax calculation.

Signature

```
global String city {get; set;}
```

Property Value

Type: String

country

Country used in an address, which is required for tax calculation.

Signature

```
global String country {get; set;}
```

Property Value

Type: String

countryCode

Country code used in an address, which is required for tax calculation.

Signature

```
global String countryCode {get; set;}
```

Property Value

Type: String

latitude

Latitude used in an address, which is required for tax calculation.

Signature

```
global Double latitude {get; set;}
```


Property Value

Type: Double

locationCode

Location code used in an address, which is required for tax calculation.

Signature

```
global String locationCode {get; set;}
```

Property Value

Type: String

longitude

Longitude used in an address, which is required for tax calculation.

Signature

```
global Double longitude {get; set;}
```

Property Value

Type: Double

postalCode

Postal code used in an address, which is required for tax calculation.

Signature

```
global String postalCode {get; set;}
```

Property Value

Type: String

state

State used in an address, which is required for tax calculation.

Signature

```
global String state {get; set;}
```

Property Value

Type: String

stateCode

State code used in an address, which is required for tax calculation.

Signature

```
global String stateCode {get; set;}
```

Property Value

Type: String

street

Street used in an address, which is required for tax calculation.

Signature

```
global String street {get; set;}
```

Property Value

Type: String

TaxAddressRequest Methods

Learn more about the available methods with the `TaxAddressRequest` class.

The `TaxAddressRequest` class includes these methods.

[equals\(obj\)](#)

Maintains the integrity of lists of type `TaxAddressRequest` by determining the equality of external objects in a list. This method is dynamic and based on the `equals()` method in Java.

[hashCode\(\)](#)

Maintains the integrity of lists of type `TaxAddressRequest` by determining the uniqueness of the external object in a list.

[toString\(\)](#)

Converts a date to a string.

equals (obj)

Maintains the integrity of lists of type `TaxAddressRequest` by determining the equality of external objects in a list. This method is dynamic and based on the `equals()` method in Java.

Signature

```
global Boolean equals(Object obj)
```

Parameters

obj

Type: Object

External object whose key is to be validated.

Return Value

Type: Boolean

hashCode ()Maintains the integrity of lists of type `TaxAddressRequest` by determining the uniqueness of the external object in a list.

Signature

`global Integer hashCode ()`

Return Value

Type: Integer

toString ()

Converts a date to a string.

Signature

`global String toString ()`

Return Value

Type: String

TaxApiException Class

Contains details about any exceptions during the tax calculation process. Extends the `ApexBaseException` class.

Namespace

[CommerceTax](#)[TaxApiException Constructors](#)Learn more about the available constructors with the `TaxApiException` class.

TaxApiException Constructors

Learn more about the available constructors with the `TaxApiException` class.The `TaxApiException` class includes these constructors.

[TaxApiException\(var1, var2\)](#)

Initializes the `TaxApiException` class using an `Exception` and a string to provide more details about the exception. This constructor is intended for test usage and throws an exception if used outside of the Apex test context.

[TaxApiException\(var1\)](#)

Initializes the `TaxApiException` class using an `Exception`. This constructor is intended for test usage and throws an exception if used outside of the Apex test context.

[TaxApiException\(\)](#)

Initializes the `TaxApiException` class without any initialized parameters. This constructor is intended for test usage and throws an exception if used outside of the Apex test context.

TaxApiException(var1, var2)

Initializes the `TaxApiException` class using an `Exception` and a string to provide more details about the exception. This constructor is intended for test usage and throws an exception if used outside of the Apex test context.

Signature

```
global TaxApiException(String var1, Exception var2)
```

Parameters

var1

Type: `String`

Text that provides more information about the returned exception.

var2

Type: [Exception](#)

An exception denotes an error that disrupts the normal flow of code execution. You can use Apex built-in exceptions or create custom exceptions. All exceptions have common methods.

TaxApiException(var1)

Initializes the `TaxApiException` class using an `Exception`. This constructor is intended for test usage and throws an exception if used outside of the Apex test context.

Signature

```
global TaxApiException(Exception var1)
```

Parameters

var1

Type: [Exception](#)

An exception denotes an error that disrupts the normal flow of code execution. You can use Apex built-in exceptions or create custom exceptions. All exceptions have common methods.

TaxApiException ()

Initializes the `TaxApiException` class without any initialized parameters. This constructor is intended for test usage and throws an exception if used outside of the Apex test context.

Signature

```
global TaxApiException ()
```

TaxCustomerDetailsRequest Class

Contains customer details used in tax calculation.

Namespace

[CommerceTax](#)

[TaxCustomerDetailsRequest Constructors](#)

Learn more about the available constructors with the `TaxCustomerDetailsRequest` class.

[TaxCustomerDetailsRequest Properties](#)

Learn more about the available properties with the `TaxCustomerDetailsRequest` class.

[TaxCustomerDetailsRequest Methods](#)

Learn more about the available methods with the `TaxCustomerDetailsRequest` class.

TaxCustomerDetailsRequest Constructors

Learn more about the available constructors with the `TaxCustomerDetailsRequest` class.

The `TaxCustomerDetailsRequest` class includes these constructors.

[TaxCustomerDetailsRequest\(accountId, code, exemptionNo, exemptionReason\)](#)

Initializes the `TaxCustomerDetailsRequest` object. This constructor is intended for test usage and throws an exception if used outside of the Apex test context.

TaxCustomerDetailsRequest(accountId, code, exemptionNo, exemptionReason)

Initializes the `TaxCustomerDetailsRequest` object. This constructor is intended for test usage and throws an exception if used outside of the Apex test context.

Signature

```
global TaxCustomerDetailsRequest (String accountId, String code, String exemptionNo,  
String exemptionReason)
```

Parameters

accountId

Type: String

The customer account ID for the line items sent for tax calculation.

code

Type: String

The tax code used during tax calculation.

exemptionNo

Type: String

The exemption number applied to any tax exempt line items.

exemptionReason

Type: String

The reason that certain line items are tax exempt.

TaxCustomerDetailsRequest Properties

Learn more about the available properties with the `TaxCustomerDetailsRequest` class.The `TaxCustomerDetailsRequest` class includes these properties.[accountId](#)

Customer account that contains the line items sent for tax calculation.

[code](#)

Tax code used during tax calculation.

[exemptionNo](#)

Number used to qualify a line item for tax exemption.

[exemptionReason](#)

Reason why a line item qualifies for tax exemption.

[taxCertificateId](#)

ID of a tax certificate used for tax calculation.

accountId

Customer account that contains the line items sent for tax calculation.

Signature

```
global String accountId {get; set;}
```

Property Value

Type: String

code

Tax code used during tax calculation.

Signature

```
global String code {get; set;}
```

Property Value

Type: String

exemptionNo

Number used to qualify a line item for tax exemption.

Signature

```
global String exemptionNo {get; set;}
```

Property Value

Type: String

exemptionReason

Reason why a line item qualifies for tax exemption.

Signature

```
global String exemptionReason {get; set;}
```

Property Value

Type: String

taxCertificateId

ID of a tax certificate used for tax calculation.

Signature

```
global String taxCertificateId {get; set;}
```

Property Value

Type: String

TaxCustomerDetailsRequest Methods

Learn more about the available methods with the `TaxCustomerDetailsRequest` class.

The `TaxCustomerDetailsRequest` class includes these methods.

[equals\(obj\)](#)

Maintains the integrity of lists of type `TaxCustomerDetailsRequest` by determining the equality of external objects in a list. This method is dynamic and based on the `equals()` method in Java.

hashCode()

Maintains the integrity of lists of type `TaxCustomerDetailsRequest` by determining the uniqueness of the external objects in a list.

toString()

Converts a value to a string.

equals (obj)

Maintains the integrity of lists of type `TaxCustomerDetailsRequest` by determining the equality of external objects in a list. This method is dynamic and based on the `equals ()` method in Java.

Signature

```
global Boolean equals (Object obj)
```

Parameters

obj

Type: Object

External object whose key is to be validated.

Return Value

Type: Boolean

hashCode ()

Maintains the integrity of lists of type `TaxCustomerDetailsRequest` by determining the uniqueness of the external objects in a list.

Signature

```
global Integer hashCode ()
```

Return Value

Type: Integer

toString ()

Converts a value to a string.

Signature

```
global String toString ()
```

Return Value

Type: String

TaxDetailsResponse Class

Stores details of the tax values that an external tax engine calculates in response to a tax calculation request.

Namespace

[CommerceTax](#)

Usage

If your tax calculation request contains multiple line items, we recommend building your adapter using a list of `TaxDetailsResponse` instances. Each instance represents the tax details calculated for a given line item.

Example

```
List<commercetax.TaxDetailsResponse> taxDetailsResponses = new
List<commercetax.TaxDetailsResponse>();
    for(integer i =0;i<1;i++){
        Integer rate = 1;
        Double taxableAmount = lineItem.amount;
        commercetax.TaxDetailsResponse taxDetailsResponse = new
commercetax.TaxDetailsResponse();
        taxDetailsResponse.setRate(Double.valueOf(rate));
        taxDetailsResponse.setTaxableAmount(taxableAmount);
        Double tax = taxableAmount*rate;
        totalLineTax+=tax;
        taxDetailsResponse.setTax(taxableAmount*rate);
        taxDetailsResponse.setExemptAmount(0);
        taxDetailsResponse.setExemptReason('exemptReason');
        taxDetailsResponse.setTaxRegionId('taxRegionId');

taxDetailsResponse.setTaxId(String.valueOf(getRandomInteger(0,2323233)));
        taxDetailsResponse.setSerCode('serCode');
        taxDetailsResponse.setTaxAuthorityTypeId('taxAuthorityTypeId');
        if(request.DocumentCode == 'SetsNullForResponseWithoutException'){
            taxDetailsResponse.setImposition(null);
        }else{
            commercetax.ImpositionResponse imposition = new
commercetax.ImpositionResponse();
            imposition.setSubType('subtype');
            imposition.setType('type');
            taxDetailsResponse.setImposition(imposition);
        }

        if(request.DocumentCode == 'SetsNullForResponseWithoutException'){
            taxDetailsResponse.setJurisdiction(null);
        }else{
            commercetax.JurisdictionResponse jurisdiction = new
commercetax.JurisdictionResponse();
            jurisdiction.setCountry('country');
            jurisdiction.setRegion('region');
            jurisdiction.setName('name');
            jurisdiction.setStateAssignedNumber('stateAssignedNo');
```

```
        jurisdiction.setId('id');
        jurisdiction.setLevel('level');
        taxDetailsResponse.setJurisdiction(jurisdiction);
    }

    taxDetailsResponses.add(taxDetailsResponse);
}
lineItemResponse.setTaxes(taxDetailsResponses);
totalTax +=totalLineTax;
totalAmount+=lineItem.amount;
```

[TaxDetailsResponse Methods](#)

Learn more about the available methods with the `TaxDetailsResponse` class.

TaxDetailsResponse Methods

Learn more about the available methods with the `TaxDetailsResponse` class.

The `TaxDetailsResponse` class includes these methods.

[setCustomTaxAttributes\(customTaxAttributes\)](#)

Uses an instance of `CustomTaxAttributesResponse` class to include additional attributes in the tax response at the tax line item level.

[setExemptAmount\(exemptAmount\)](#)

Sets the `ExemptAmount` field of the `TaxDetailsResponse` class.

[setExemptReason\(reason\)](#)

Sets the `ExemptReason` field of the `TaxDetailsResponse` class.

[setImposition\(imposition\)](#)

Sets the `Imposition` field of the `TaxDetailsResponse` class using an instance of the `ImpositionResponse` class.

[setJurisdiction\(jurisdiction\)](#)

Sets the `Jurisdiction` field of the `TaxDetailsResponse` using an instance of the `JurisdictionResponse` class.

[setRate\(rate\)](#)

Sets the `Rate` field of the `TaxDetailsResponse` class.

[setSerCode\(serCode\)](#)

Sets the `Service Code` field of the `TaxDetailsResponse` class.

[setTax\(tax\)](#)

Sets the `Tax` field of the `TaxDetailsResponse` class.

[setTaxAuthorityTypeId\(taxAuthorityTypeId\)](#)

Sets the `TaxAuthorityTypeId` field of the `TaxDetailsResponse` class.

[setTaxId\(taxId\)](#)

Sets the `TaxId` field of the `TaxDetailsResponse` class.

[setTaxRegionId\(taxRegionId\)](#)

Sets the `TaxRegionId` field on the `TaxDetailsResponse` class.

[setTaxRuleDetails\(taxRuleDetails\)](#)

Sets the TaxRuleDetails field of the TaxDetailsResponse class.

[setTaxableAmount\(taxableAmount\)](#)

Sets the TaxableAmount field of the TaxDetailsResponse class.

setCustomTaxAttributes (customTaxAttributes)

Uses an instance of CustomTaxAttributesResponse class to include additional attributes in the tax response at the tax line item level.

Signature

```
global void setCustomTaxAttributes (commercetax.CustomTaxAttributesResponse
customTaxAttributes)
```

Parameters

customTaxAttributes

Type: [CustomTaxAttributesResponse](#)

Additional data or custom attributes to include in the tax response.

Return Value

Type: void

setExemptAmount (exemptAmount)

Sets the ExemptAmount field of the TaxDetailsResponse class.

Signature

```
global void setExemptAmount (Double exemptAmount)
```

Parameters

exemptAmount

Type: Double

Amount of tax on a line item that is exempt from tax calculation.

Return Value

Type: void

setExemptReason (reason)

Sets the ExemptReason field of the TaxDetailsResponse class.

Signature

```
global void setExemptReason (String reason)
```

Parameters

reason

Type: String

Optional user-defined information on why a tax exemption applies to a line item.

Return Value

Type: void

setImposition(imposition)Sets the Imposition field of the `TaxDetailsResponse` class using an instance of the `ImpositionResponse` class.

Signature

```
global void setImposition(commercetax.ImpositionResponse imposition)
```

Parameters

*imposition*Type: [ImpositionResponse](#)

Contains information about why tax was imposed on a line item.

Return Value

Type: void

setJurisdiction(jurisdiction)Sets the Jurisdiction field of the `TaxDetailsResponse` using an instance of the `JurisdictionResponse` class.

Signature

```
global void setJurisdiction(commercetax.JurisdictionResponse jurisdiction)
```

Parameters

*jurisdiction*Type: [JurisdictionResponse](#)

Contains address information about the tax jurisdiction used in the tax calculation process.

Return Value

Type: void

setRate(rate)Sets the Rate field of the `TaxDetailsResponse` class.

Signature

```
global void setRate(Double rate)
```

Parameters

rate

Type: Double

Tax used during tax calculation. This value is often a decimal amount, such as 0.1 or 0.06, based on the applied tax percentage.

Return Value

Type: void

setSerCode (serCode)

Sets the Service Code field of the `TaxDetailsResponse` class.

Signature

```
global void setSerCode(String serCode)
```

Parameters

serCode

Type: String

Service code used in tax calculation.

Return Value

Type: void

setTax (tax)

Sets the Tax field of the `TaxDetailsResponse` class.

Signature

```
global void setTax(Double tax)
```

Parameters

tax

Type: Double

Amount of tax for a line item.

Return Value

Type: void

setTaxAuthorityTypeId (taxAuthorityTypeId)

Sets the TaxAuthorityTypeId field of the TaxDetailsResponse class.

Signature

```
global void setTaxAuthorityTypeId(String taxAuthorityTypeId)
```

Parameters

taxAuthorityTypeId

Type: String

ID of the organization that oversees tax collection.

Return Value

Type: void

setTaxId (taxId)

Sets the TaxId field of the TaxDetailsResponse class.

Signature

```
global void setTaxId(String taxId)
```

Parameters

taxId

Type: String

ID value used to determine the tax for an individual or business.

Return Value

Type: void

setTaxRegionId (taxRegionId)

Sets the TaxRegionId field on the TaxDetailsResponse class.

Signature

```
global void setTaxRegionId(String taxRegionId)
```

Parameters

taxRegionId

Type: String

ID of the tax region used in tax calculation. A tax region represents a geographical area where tax is applied.

Return Value

Type: void

setTaxRuleDetails (taxRuleDetails)

Sets the TaxRuleDetails field of the TaxDetailsResponse class.

Signature

```
global void setTaxRuleDetails (commercetax.RuleDetailsResponse taxRuleDetails)
```

Parameters

taxRuleDetails

Type: [RuleDetailsResponse](#)

Information about the Salesforce tax rules used during tax calculation.

Return Value

Type: void

setTaxableAmount (taxableAmount)

Sets the TaxableAmount field of the TaxDetailsResponse class.

Signature

```
global void setTaxableAmount (Double taxableAmount)
```

Parameters

taxableAmount

Type: Double

Amount that can be taxed on a line item.

Return Value

Type: void

TaxEngineAdapter Interface

Retrieves information from the tax engine and evaluates the information to define tax details.

Namespace

[CommerceTax](#)

[TaxEngineAdapter Methods](#)

Learn more about the available methods with the `TaxEngineAdapter` class.

[TaxEngineAdapter Example Implementation](#)

Refer to the example implementation of the `TaxEngineAdapter` interface to accept information from a tax engine and evaluate the information to define tax details.

TaxEngineAdapter Methods

Learn more about the available methods with the `TaxEngineAdapter` class.

The `TaxEngineAdapter` class includes these methods.

[processRequest\(requestType\)](#)

The `processRequest` method takes an instance of `TaxEngineContext` class and returns a response with the calculated tax details through the `TaxDetailsResponse` class or an error response through the `ErrorResponse` class.

processRequest (requestType)

The `processRequest` method takes an instance of `TaxEngineContext` class and returns a response with the calculated tax details through the `TaxDetailsResponse` class or an error response through the `ErrorResponse` class.

Signature

```
global commercetax.TaxEngineResponse processRequest (commercetax.TaxEngineContext var1)
```

Parameters

var1

Type: [TaxEngineContext](#)

Wrapper class that stores information about the type of a tax calculation request.

Return Value

Type: `TaxEngineResponse`

Generic interface representing a response from a tax engine.

TaxEngineAdapter Example Implementation

Refer to the example implementation of the `TaxEngineAdapter` interface to accept information from a tax engine and evaluate the information to define tax details.

Namespace

[commercetax](#)

Usage

The `TaxEngineAdapter` interface accepts information from the tax engine through the `TaxEngineContext` class. The interface evaluates the information to define tax in the response with details, such as tax amount and addresses. The response is used to update and create entities in the Salesforce org.

Use these steps to build a sample tax adapter implementation. Each tax adapter implementation varies based on your implementation requirements. Customize this example to suit your business requirements.

Example:

- The custom adapter class implements the `TaxEngineAdapter` interface. The `processRequest` method takes an instance of `TaxEngineContext` class and returns a response with the calculated tax details through the `TaxDetailsResponse` class or an error response through the `ErrorResponse` class.

```
global virtual class AvalaraAdapter implements commercetax.TaxEngineAdapter {
    global commercetax.TaxEngineResponse processRequest (commercetax.TaxEngineContext
taxEngineContext) {
        commercetax.RequestType requestType = taxEngineContext.getRequestType();
        if(requestType == commercetax.RequestType.CalculateTax){
            return CalculateTaxService.getTax(taxEngineContext);
        }
        else
            return null;
    }
}
```

- This example shows the `CalculateTaxService` class.

```
global class CalculateTaxService {
    // =====
    // CONSTANT
    // =====

    private static final String AVALARA_ENDPOINT_URL_SANDBOX =
'https://sandbox-rest.avatax.com/api/v2';
    // Avalara Endpoint URL Production
    private static final String AVALARA_ENDPOINT_URL_PRODUCTION =
'https://rest.avatax.com/api/v2';
    private static final String TEST_REQUEST_BODY = '{ "id": -1, "code": "00000131",
"companyId": -1, "date": "2017-02-03T00:00:00", "taxDate": "2017-02-03T00:00:00",
"status": "Temporary", "type": "SalesOrder", "reconciled": false, "totalAmount":
4000, "totalExempt": 0, "totalTax": 290, "totalTaxable": 4000,
"totalTaxCalculated": 290, "adjustmentReason": "NotAdjusted", "locked": false,
"version": 1, "modifiedDate": "2017-02-03T12:18:18.7347388Z", "modifiedUserId":
53894, "lines": [ { "id": -1, "transactionId": -1, "lineNumber":
"80241000000jNDCAA2", "discountAmount": 0, "exemptAmount": 0,
"exemptCertId": 0, "isItemTaxable": true, "lineAmount": 1000,
"reportingDate": "2017-02-03T00:00:00", "tax": 72.5, "taxableAmount":
1000, "taxCalculated": 72.5, "taxCode": "P0000000", "taxDate":
"2017-02-03T00:00:00", "taxIncluded": false, "details": [ {
"id": -1, "transactionLineId": -1, "transactionId": -1,
"country": "US", "region": "CA", "exemptAmount": 0,
"jurisCode": "06", "jurisName": "CALIFORNIA", "stateAssignedNo":
"", "jurisType": "STA", "nonTaxableAmount": 0, "rate":
0.06, "tax": 60, "taxableAmount": 1000, "taxType":
"Sales", "taxName": "CA STATE TAX", "taxAuthorityTypeId": 45,
"taxCalculated": 60, "rateType": "General" }, {
"id": -1, "transactionLineId": -1, "transactionId": -1,
```

```

        "country": "US",           "region": "CA",           "exemptAmount": 0,
        "jurisCode": "075",       "jurisName": "SAN FRANCISCO",
        "stateAssignedNo": "",     "jurisType": "CTY",       "nonTaxableAmount": 0,
        "rate": 0.0025,           "tax": 2.5,               "taxableAmount": 1000,
        "taxType": "Sales",        "taxName": "CA COUNTY TAX",
        "taxAuthorityTypeId": 45,   "taxCalculated": 2.5,     "rateType":
"General"    }, {           "id": -1,                 "transactionLineId": -1,
        "transactionId": -1,       "country": "US",         "region": "CA",
        "exemptAmount": 0,         "jurisCode": "EMTV0",    "jurisName": "SAN
FRANCISCO CO LOCAL TAX SL",     "stateAssignedNo": "38",   "jurisType":
"STJ",       "nonTaxableAmount": 0,   "rate": 0.01,           "tax": 10,
        "taxableAmount": 1000,     "taxType": "Sales",      "taxName":
"CA SPECIAL TAX",               "taxAuthorityTypeId": 45,   "taxCalculated": 10,
        "rateType": "General"    }    ]    }    ]}';

private static String getTestResponseString(){

List<String> jsonResponse = new List<String> {
        "id": 0',
        "code": "testDocCode1231245984"',
        "companyId": 468039',
        "date": "2020-07-15"',
        "paymentDate": "2020-07-15"',
        "status": "Temporary"',
        "type": "SalesOrder"',
        "customerVendorCode": "testDocCode1234"',
        "customerCode": "testDocCode1234"',
        "reconciled": false',
        "totalAmount": 232',
        "totalExempt": 0',
        "totalDiscount": 0',
        "totalTax": 23.43',
        "totalTaxable": 232',
        "totalTaxCalculated": 23.43',
        "adjustmentReason": "NotAdjusted"',
        "locked": false',
        "version": 1',
        "exchangeRateEffectiveDate": "2020-07-15"',
        "exchangeRate": 1',
        "modifiedDate": "2020-08-13T11:19:20.4836636Z"',

        "modifiedUserId": 53894',
        "taxDate": "2020-07-15T00:00:00"',
        "lines": [{"id": 0,"transactionId":
0,"lineNumber": "1","discountAmount": 0,"exemptAmount": 0,"exemptCertId":
0,"isItemTaxable": true,"itemCode": "", "lineAmount": 232,"quantity":
1,"reportingDate": "2020-07-15","tax": 23.43,"taxableAmount": 232,"taxCalculated":
23.43,"taxCode": "P0000000","taxCodeId": 8087,"taxDate":
"2020-07-15","taxOverrideType": "None","taxOverrideAmount": 0,"taxIncluded":
false,"details": [{"id": 0,"transactionLineId": 0,"transactionId": 0,"country":
"US","region": "WA","exemptAmount": 0,"jurisCode": "53","jurisName":
"WASHINGTON","stateAssignedNo": "", "jurisType": "STA","jurisdictionType":
"State","nonTaxableAmount": 0,"rate": 0.065,"tax": 15.08,"taxableAmount":
232,"taxType": "Sales","taxSubTypeId": "S","taxName": "WA STATE

```

```

TAX", "taxAuthorityTypeId": 45, "taxCalculated": 15.08, "rateType":
"General", "rateTypeCode": "G", "unitOfBasis": "PerCurrencyUnit", "isNonPassThru":
false, "isFee": false}, {"id": 0, "transactionLineId": 0, "transactionId": 0, "country":
"US", "region": "WA", "exemptAmount": 0, "jurisCode": "033", "jurisName":
"KING", "stateAssignedNo": "1700", "jurisType": "CTY", "jurisdictionType":
"County", "nonTaxableAmount": 0, "rate": 0, "tax": 0, "taxableAmount": 232, "taxType":
"Sales", "taxSubTypeId": "S", "taxName": "WA COUNTY TAX", "taxAuthorityTypeId":
45, "taxCalculated": 0, "rateType": "General", "rateTypeCode": "G", "unitOfBasis":
"PerCurrencyUnit", "isNonPassThru": false, "isFee": false}], "nonPassthroughDetails":
[], "hsCode": "", "costInsuranceFreight": 0, "vatCode": "", "vatNumberTypeId": 0}],
      "addresses": [{"id": 0, "transactionId":
0, "boundaryLevel": "Address", "line1": "255 S. King Street", "line2": "", "line3":
"", "city": "Seattle", "region": "WA", "postalCode": "98104", "country":
"US", "taxRegionId": 2109700, "latitude": "47.59821", "longitude": "-122.33108"}],
      "summary": [{"country": "US", "region":
"WA", "jurisType": "State", "jurisCode": "53", "jurisName":
"WASHINGTON", "taxAuthorityType": 45, "stateAssignedNo": "", "taxType":
"Sales", "taxSubType": "S", "taxName": "WA STATE TAX", "rateType": "General", "taxable":
232, "rate": 0.065, "tax": 15.08, "taxCalculated": 15.08, "nonTaxable": 0, "exemption":
0}, {"country": "US", "region": "WA", "jurisType": "County", "jurisCode":
"033", "jurisName": "KING", "taxAuthorityType": 45, "stateAssignedNo": "1700", "taxType":
"Sales", "taxSubType": "S", "taxName": "WA COUNTY TAX", "rateType": "General", "taxable":
232, "rate": 0, "tax": 0, "taxCalculated": 0, "nonTaxable": 0, "exemption": 0}]
    };
    return '{' + String.join(jsonResponse, ',') + '}';
}

public static commercetax.TaxEngineResponse getTax(commercetax.TaxEngineContext
taxEngineContext)
{
    commercetax.CalculateTaxRequest request =
(commercetax.CalculateTaxRequest)taxEngineContext.getRequest();
    commercetax.calculatetaxtype requestType = request.taxtype;
    string referenceEntity = request.ReferenceEntityId;
    try{
        List<commercetax.TaxLineItemRequest> listOfLines = request.lineItems;
        if(!listOfLines.isEmpty()){
            HttpService sendHttpRequest = new HttpService();
            sendHttpRequest.addHeader('Content-type', 'application/json');
            String requestBody =
AvalaraJSONBuilder.getInstance().frameJsonForGetTaxOrderItem(request);
            sendHttpRequest.post('/transactions/create', requestBody);
            //system.debug('Request '+requestBody);
            String responseString = '';
            if(Test.isRunningTest()){
                responseString = getTestResponseString();
            } else{
                responseString = sendHttpRequest.getResponse().getBody();
            }
            //system.debug(sendHttpRequest.getResponse());
            //system.debug('response'+responseString);
            //responseString = TEST_REQUEST_BODY;
            system.debug('Heap size used ' +Limits.getHeapSize());
        }
    }
}

```

```

        if (!responseString.contains('error'))
        {
            commercetax.CalculateTaxResponse response = new
commercetax.CalculateTaxResponse();
            JsonSuccessParser jsonSuccessParserClass =
JsonSuccessParser.parse(responseString);
            response.setTaxTransactionType(request.taxTransactionType);
            response.setDocumentCode(jsonSuccessParserClass.code);

response.setReferenceDocumentCode(jsonSuccessParserClass.referenceCode);
            if(jsonSuccessParserClass.status == 'Temporary') {

response.setStatus(commercetax.TaxTransactionStatus.Uncommitted);
            }
            if(jsonSuccessParserClass.status == 'Committed') {

response.setStatus(commercetax.TaxTransactionStatus.Committed);
            }
            response.setTaxType(requestType);
            commercetax.AmountDetailsResponse headerAmountResponse = new
commercetax.AmountDetailsResponse();

headerAmountResponse.setTotalAmountWithTax(jsonSuccessParserClass.totalAmount +
jsonSuccessParserClass.totaltax);

headerAmountResponse.setExemptAmount(jsonSuccessParserClass.totalExempt);

headerAmountResponse.setTotalAmount(jsonSuccessParserClass.totalAmount);

headerAmountResponse.setTaxAmount(jsonSuccessParserClass.totalTax);
            response.setAmountDetails(headerAmountResponse);

response.setStatusDescription(jsonSuccessParserClass.adjustmentReason);

response.setEffectiveDate(date.valueOf(jsonSuccessParserClass.taxDate));

response.setTransactionDate(date.valueOf(jsonSuccessParserClass.transactionDate));
            response.setReferenceEntityId(referenceEntity);
            response.setTaxTransactionId(jsonSuccessParserClass.id);
            response.setCurrencyIsoCode(request.currencyIsoCode);
            List<commercetax.LineItemResponse> lineItemResponses = new
List<commercetax.LineItemResponse>();
            for(JsonSuccessParser.Lines linesToProcess:
jsonSuccessParserClass.lines)
            {
                commercetax.LineItemResponse lineItemResponse = new
commercetax.LineItemResponse();
                Double rateCalculated = 0.0;
                List<commercetax.TaxDetailsResponse> taxDetailsResponses =
new List<commercetax.TaxDetailsResponse>();
                for(JsonSuccessParser.details linesDetails :
linesToProcess.details)
                {
                    commercetax.TaxDetailsResponse taxDetailsResponse = new

```

```

    commercetax.TaxDetailsResponse();
        if (linesDetails.exemptAmount != 0) {
taxDetailsResponse.setExemptAmount(linesDetails.exemptAmount);
            taxDetailsResponse.setExemptReason('Some reason we
dont know');
        }
        commercetax.ImpositionResponse imposition = new
commercetax.ImpositionResponse();
            imposition.setSubType(linesDetails.taxName);
            imposition.setType(linesDetails.rateType);
            imposition.setSubType(linesDetails.taxName);
            taxDetailsResponse.setImposition(imposition);
        commercetax.JurisdictionResponse jurisdiction = new
commercetax.JurisdictionResponse();
            jurisdiction.setCountry(linesDetails.country);
            jurisdiction.setRegion(linesDetails.region);
            jurisdiction.setName(linesDetails.jurisName);

jurisdiction.setStateAssignedNumber(linesDetails.stateAssignedNo);
            jurisdiction.setId(linesDetails.jurisCode);
            jurisdiction.setLevel(linesDetails.jurisType);
            taxDetailsResponse.setJurisdiction(jurisdiction);

            rateCalculated += linesDetails.rate;
            taxDetailsResponse.setRate(rateCalculated);
            taxDetailsResponse.setTax(linesDetails.taxCalculated);

taxDetailsResponse.setTaxableAmount(linesDetails.taxableAmount);

taxDetailsResponse.setTaxAuthorityTypeId(String.valueOf(linesDetails.taxAuthorityTypeId));

            taxDetailsResponse.setTaxId(linesDetails.id);

taxDetailsResponse.setTaxRegionId(linesDetails.region);
            taxDetailsResponses.add(taxDetailsResponse);
        }
        lineItemResponse.setTaxes(taxDetailsResponses);

lineItemResponse.setEffectiveDate(date.valueOf(linesToProcess.taxDate));
            lineItemResponse.setIsTaxable(true);
            commercetax.AmountDetailsResponse amountResponse =
new commercetax.AmountDetailsResponse();

amountResponse.setTaxAmount(linesToProcess.taxCalculated);

amountResponse.setTotalAmount(linesToProcess.lineAmount);

amountResponse.setTotalAmountWithTax(linesToProcess.lineAmount+linesToProcess.taxCalculated);

amountResponse.setExemptAmount(linesToProcess.exemptAmount);

```

```

        lineItemResponse.setAmountDetails(amountResponse);
lineItemResponse.setIsTaxable(linesToProcess.isItemTaxable);
        lineItemResponse.setProductCode(linesToProcess.itemCode);

        lineItemResponse.setTaxCode(linesToProcess.taxCode);
        lineItemResponse.setLineNumber(linesToProcess.lineNumber);

        lineItemResponse.setQuantity(linesToProcess.quantity);
        lineItemResponses.add(lineItemResponse);
    }
    response.setLineItems(lineItemResponses);
    return response;
}
else
{
    JsonErrorParser jsonErrorParserClass =
JsonErrorParser.parse(responseString);
    String message = null;
    if(String.isNotBlank(jsonErrorParserClass.error.message))
    {
        message=jsonErrorParserClass.error.message;
    }else{
        String errorMessage = '';
        for(JsonErrorParser.cls_details messageString :
jsonErrorParserClass.error.details)
        {
            if(String.isNotBlank(messageString.message) )
            {
                errorMessage = messageString.message;
            }
        }
        message = errorMessage;
    }
    return new
commercetax.ErrorResponse(commercetax.resultcode.TaxEngineError, '501', message);

}
}else return null;
}
catch (Exception e)
{
    throw e;
}
}
}

```

- In the `HttpService` class, replace the `test` value in the endpoint variable with the name of the `TaxTypedNamedCredential` record. This class contains the credentials that are required to access your Avalara account through Salesforce.

```

public with sharing class HttpService
{

```

```
// Attribute to implement singleton pattern for Order Product Service class
private static HttpService httpServiceInstance;

// VARIABLES

private HttpResponse httpResponse;
private Map<String,String> mapOfHeaderParameter = new Map<String,String>();
private enum Method {GET, POST}

/**
 * @name getInstance
 * @description get an Instance of Service class
 * @params NA
 * @return Http Service Class Instance
 */
public static HttpService getInstance()
{
    if (NULL == httpServiceInstance)
    {
        httpServiceInstance = new HttpService();
    }
    return httpServiceInstance;
}

/**
 * @name get
 * @description Get Method to get a HTTP request
 */
public void get(String endPoint)
{
    send(newRequest(Method.GET, endPoint));
}

/**
 * @name post
 * @description Post Method to Post a HTTP request
 */
public void post(String path, String requestBody)
{
    String endPoint = 'callout:commerce.tax.TaxTypedNamedCredential:test'+path;
    send(newRequest(Method.POST, endPoint, requestBody));
}

/**
 * @name addHeader
 * @description addHeader Methods to add all the default Header's required fo
rthe request
 */
public void addHeader(String name, String value)
{
    mapOfHeaderParameter.put(name, value);
}

/**
```

```
* @name setHeader
* @description setHeader Methods to set setHeader for the request
*/
private void setHeader(HttpRequest request)
{
    for(String headerValue : mapOfHeaderParameter.keySet())
    {
        request.setHeader(headerValue, mapOfHeaderParameter.get(headerValue));
    }
}
/**
* @name newRequest
* @description newRequest Methods to make a new request
*/
private HttpRequest newRequest(Method method, String endPoint)
{
    return newRequest(method, endPoint, NULL);
}

/**
* @name newRequest
* @description newRequest Methods to make a new request
*/
private HttpRequest newRequest(Method method, String endPoint, String requestBody)
{
    HttpRequest request = new HttpRequest();
    request.setMethod(Method.name());
    setHeader(request);
    request.setEndpoint(endPoint);
    if (String.isNotBlank(requestBody))
    {
        request.setBody(requestBody);
    }
    request.setTimeout(120000);
    return request;
}

/**
* @name send
* @description send Methods to send a request
*/
private void send(HttpRequest request)
{
    try
    {
        Http http = new Http();
        httpResponse = http.send(request);
    }
    catch(System.CalloutException e)
    {
        system.debug('callout exception happened' + e.getMessage());
    }
    catch(Exception e)
```



```

        {
            system.debug('callout did not happen' + e.getMessage());
        }
    }

    /**
     * @name getResponse
     * @description getResponse Method to get the Response
     */
    public HttpResponse getResponse()
    {
        return httpResponse;
    }

    /**
     * @name getResponseToString
     * @description getResponse Method to get the Responses
     */
    public String getResponseToString()
    {
        return getResponse().toString();
    }
}

```

- Parse the JsonResponseParser response object by using the AvalaraJSONBuilder class to build the response for your adapter.

This example shows the JsonResponseParser class.

```

global with sharing class JsonResponseParser
{
    public static void consumeObject(JSONParser parser)
    {
        Integer depth = 0;
        do {
            JSNToken curr = parser.getCurrentToken();
            if (curr == JSNToken.START_OBJECT ||
                curr == JSNToken.START_ARRAY) {
                depth++;
            } else if (curr == JSNToken.END_OBJECT ||
                curr == JSNToken.END_ARRAY) {
                depth--;
            }
        } while (depth > 0 && parser.nextToken() != null);
    }

    public class Addresses {
        public String id {get;set;}
        public String transactionId {get;set;}
        public String boundaryLevel {get;set;}
        public String line1 {get;set;}
        public String city {get;set;}
        public String region {get;set;}
        public String postalCode {get;set;}
        public String country {get;set;}
    }
}

```

```

public Integer taxRegionId {get;set;}

public Addresses(JSONParser parser) {
    while (parser.nextToken() != JSONToken.END_OBJECT) {
        if (parser.getCurrentToken() == JSONToken.FIELD_NAME) {
            String text = parser.getText();
            if (parser.nextToken() != JSONToken.VALUE_NULL) {
                if (text == 'id') {
                    id = parser.getText();
                } else if (text == 'transactionId') {
                    transactionId = parser.getText();
                } else if (text == 'boundaryLevel') {
                    boundaryLevel = parser.getText();
                } else if (text == 'line1') {
                    line1 = parser.getText();
                } else if (text == 'city') {
                    city = parser.getText();
                } else if (text == 'region') {
                    region = parser.getText();
                } else if (text == 'postalCode') {
                    postalCode = parser.getText();
                } else if (text == 'country') {
                    country = parser.getText();
                } else if (text == 'taxRegionId') {
                    taxRegionId = parser.getIntegerValue();
                } else {
                    consumeObject(parser);
                }
            }
        }
    }
}

public class Details {
    public String id {get;set;}
    public String transactionLineId {get;set;}
    public String transactionId {get;set;}
    public String country {get;set;}
    public String region {get;set;}
    public Integer exemptAmount {get;set;}
    public String jurisCode {get;set;}
    public String jurisName {get;set;}
    public String stateAssignedNo {get;set;}
    public String jurisType {get;set;}
    public Integer nonTaxableAmount {get;set;}
    public Double rate {get;set;}
    public Double tax {get;set;}
    public Integer taxableAmount {get;set;}
    public String taxType {get;set;}
    public String taxName {get;set;}
    public Integer taxAuthorityTypeId {get;set;}
    public Double taxCalculated {get;set;}
    public String rateType {get;set;}
}

```

```

public Details(JSONParser parser) {
    while (parser.nextToken() != JSONToken.END_OBJECT) {
        if (parser.getCurrentToken() == JSONToken.FIELD_NAME) {
            String text = parser.getText();
            if (parser.nextToken() != JSONToken.VALUE_NULL) {
                if (text == 'id') {
                    id = parser.getText();
                } else if (text == 'transactionLineId') {
                    transactionLineId = parser.getText();
                } else if (text == 'transactionId') {
                    transactionId = parser.getText();
                } else if (text == 'country') {
                    country = parser.getText();
                } else if (text == 'region') {
                    region = parser.getText();
                } else if (text == 'exemptAmount') {
                    exemptAmount = parser.getIntegerValue();
                } else if (text == 'jurisCode') {
                    jurisCode = parser.getText();
                } else if (text == 'jurisName') {
                    jurisName = parser.getText();
                } else if (text == 'stateAssignedNo') {
                    stateAssignedNo = parser.getText();
                } else if (text == 'jurisType') {
                    jurisType = parser.getText();
                } else if (text == 'nonTaxableAmount') {
                    nonTaxableAmount = parser.getIntegerValue();
                } else if (text == 'rate') {
                    rate = parser.getDoubleValue();
                } else if (text == 'tax') {
                    tax = parser.getDoubleValue();
                } else if (text == 'taxableAmount') {
                    taxableAmount = parser.getIntegerValue();
                } else if (text == 'taxType') {
                    taxType = parser.getText();
                } else if (text == 'taxName') {
                    taxName = parser.getText();
                } else if (text == 'taxAuthorityTypeId') {
                    taxAuthorityTypeId = parser.getIntegerValue();
                } else if (text == 'taxCalculated') {
                    taxCalculated = parser.getDoubleValue();
                } else if (text == 'rateType') {
                    rateType = parser.getText();
                } else {
                    consumeObject(parser);
                }
            }
        }
    }
}

public class Messages {

```

```

public String summary {get;set;}
public String details {get;set;}
public String refersTo {get;set;}
public String severity {get;set;}
public String source {get;set;}

public Messages(JSONParser parser) {
    while (parser.nextToken() != JSONToken.END_OBJECT) {
        if (parser.getCurrentToken() == JSONToken.FIELD_NAME) {
            String text = parser.getText();
            if (parser.nextToken() != JSONToken.VALUE_NULL) {
                if (text == 'summary') {
                    summary = parser.getText();
                } else if (text == 'details') {
                    details = parser.getText();
                } else if (text == 'refersTo') {
                    refersTo = parser.getText();
                } else if (text == 'severity') {
                    severity = parser.getText();
                } else if (text == 'source') {
                    source = parser.getText();
                } else {
                    consumeObject(parser);
                }
            }
        }
    }
}

public String id {get;set;}
public String code {get;set;}
public String referenceCode {get;set;}
public Integer companyId {get;set;}
public String taxDate {get;set;}
public String transactionDate {get;set;}
public String status {get;set;}
public String type_Z {get;set;} // in json: type
public Boolean reconciled {get;set;}
public Integer totalAmount {get;set;}
public Integer totalExempt {get;set;}
public Double totalTax {get;set;}
public Integer totalTaxable {get;set;}
public Double totalTaxCalculated {get;set;}
public String adjustmentReason {get;set;}
public Boolean locked {get;set;}
public Integer version {get;set;}
public String modifiedDate {get;set;}
public Integer modifiedUserId {get;set;}
public List<Lines> lines {get;set;}
public List<Addresses> addresses {get;set;}
public List<Summary> summary {get;set;}
public List<Messages> messages {get;set;}

```

```

public JsonSuccessParser(JSONParser parser) {
    while (parser.nextToken() != JSONToken.END_OBJECT) {
        if (parser.getCurrentToken() == JSONToken.FIELD_NAME) {
            String text = parser.getText();
            if (parser.nextToken() != JSONToken.VALUE_NULL) {
                if (text == 'id') {
                    id = parser.getText();
                } else if (text == 'code') {
                    code = parser.getText();
                } else if (text == 'referenceCode') {
                    referenceCode = parser.getText();
                } else if (text == 'companyId') {
                    companyId = parser.getIntegerValue();
                } else if (text == 'taxDate') {
                    taxDate = parser.getText();
                } else if (text == 'date') {
                    transactionDate = parser.getText();
                } else if (text == 'status') {
                    status = parser.getText();
                } else if (text == 'type') {
                    type_Z = parser.getText();
                } else if (text == 'reconciled') {
                    reconciled = parser.getBooleanValue();
                } else if (text == 'totalAmount') {
                    totalAmount = parser.getIntegerValue();
                } else if (text == 'totalExempt') {
                    totalExempt = parser.getIntegerValue();
                } else if (text == 'totalTax') {
                    totalTax = parser.getDoubleValue();
                } else if (text == 'totalTaxable') {
                    totalTaxable = parser.getIntegerValue();
                } else if (text == 'totalTaxCalculated') {
                    totalTaxCalculated = parser.getDoubleValue();
                } else if (text == 'adjustmentReason') {
                    adjustmentReason = parser.getText();
                } else if (text == 'locked') {
                    locked = parser.getBooleanValue();
                } else if (text == 'version') {
                    version = parser.getIntegerValue();
                } else if (text == 'modifiedDate') {
                    modifiedDate = parser.getText();
                } else if (text == 'modifiedUserId') {
                    modifiedUserId = parser.getIntegerValue();
                } else if (text == 'lines') {
                    lines = new List<Lines>();
                    while (parser.nextToken() != JSONToken.END_ARRAY) {
                        lines.add(new Lines(parser));
                    }
                } else if (text == 'addresses') {
                    addresses = new List<Addresses>();
                    while (parser.nextToken() != JSONToken.END_ARRAY) {
                        addresses.add(new Addresses(parser));
                    }
                } else if (text == 'summary') {

```

```

        summary = new List<Summary>();
        while (parser.nextToken() != JSONToken.END_ARRAY) {
            summary.add(new Summary(parser));
        }
    } else if (text == 'messages') {
        messages = new List<Messages>();
        while (parser.nextToken() != JSONToken.END_ARRAY) {
            messages.add(new Messages(parser));
        }
    } else {
        consumeObject(parser);
    }
}
}
}

public class Summary {
    public String country {get;set;}
    public String region {get;set;}
    public String jurisType {get;set;}
    public String jurisCode {get;set;}
    public String jurisName {get;set;}
    public Integer taxAuthorityType {get;set;}
    public String stateAssignedNo {get;set;}
    public String taxType {get;set;}
    public String taxName {get;set;}
    public String taxGroup {get;set;}
    public String rateType {get;set;}
    public Integer taxable {get;set;}
    public Double rate {get;set;}
    public Double tax {get;set;}
    public Double taxCalculated {get;set;}
    public Integer nonTaxable {get;set;}
    public Integer exemption {get;set;}

    public Summary(JSONParser parser) {
        while (parser.nextToken() != JSONToken.END_OBJECT) {
            if (parser.getCurrentToken() == JSONToken.FIELD_NAME) {
                String text = parser.getText();
                if (parser.nextToken() != JSONToken.VALUE_NULL) {
                    if (text == 'country') {
                        country = parser.getText();
                    } else if (text == 'region') {
                        region = parser.getText();
                    } else if (text == 'jurisType') {
                        jurisType = parser.getText();
                    } else if (text == 'jurisCode') {
                        jurisCode = parser.getText();
                    } else if (text == 'jurisName') {
                        jurisName = parser.getText();
                    } else if (text == 'taxAuthorityType') {
                        taxAuthorityType = parser.getIntegerValue();
                    } else if (text == 'stateAssignedNo') {

```

```

        stateAssignedNo = parser.getText();
    } else if (text == 'taxType') {
        taxType = parser.getText();
    } else if (text == 'taxName') {
        taxName = parser.getText();
    } else if (text == 'taxGroup') {
        taxGroup = parser.getText();
    } else if (text == 'rateType') {
        rateType = parser.getText();
    } else if (text == 'taxable') {
        taxable = parser.getIntegerValue();
    } else if (text == 'rate') {
        rate = parser.getDoubleValue();
    } else if (text == 'tax') {
        tax = parser.getDoubleValue();
    } else if (text == 'taxCalculated') {
        taxCalculated = parser.getDoubleValue();
    } else if (text == 'nonTaxable') {
        nonTaxable = parser.getIntegerValue();
    } else if (text == 'exemption') {
        exemption = parser.getIntegerValue();
    } else {
        consumeObject(parser);
    }
    }
    }
    }
}

public class Lines {
    public String id {get;set;}
    public String transactionId {get;set;}
    public String lineNumber {get;set;}
    public Integer discountAmount {get;set;}
    public Integer exemptAmount {get;set;}
    public Integer exemptCertId {get;set;}
    public Boolean isItemTaxable {get;set;}
    public Integer lineAmount {get;set;}
    public Double quantity {get;set;}
    public String reportingDate {get;set;}
    public Double tax {get;set;}
    public Integer taxableAmount {get;set;}
    public Double taxCalculated {get;set;}
    public String taxCode {get;set;}
    public String taxDate {get;set;}
    public Boolean taxIncluded {get;set;}
    public List<Details> details {get;set;}
    public String itemCode {get;set;}
    public Lines(JSONParser parser) {
        while (parser.nextToken() != JSONTOKEN.END_OBJECT) {
            if (parser.getCurrentToken() == JSONTOKEN.FIELD_NAME) {
                String text = parser.getText();
                if (parser.nextToken() != JSONTOKEN.VALUE_NULL) {

```

```

    if (text == 'id') {
        id = parser.getText();
    } else if (text == 'transactionId') {
        transactionId = parser.getText();
    } else if (text == 'itemCode') {
        itemCode = parser.getText();
    } else if (text == 'lineNumber') {
        lineNumber = parser.getText();
    } else if (text == 'discountAmount') {
        discountAmount = parser.getIntegerValue();
    } else if (text == 'exemptAmount') {
        exemptAmount = parser.getIntegerValue();
    } else if (text == 'exemptCertId') {
        exemptCertId = parser.getIntegerValue();
    } else if (text == 'isItemTaxable') {
        isItemTaxable = parser.getBooleanValue();
    } else if (text == 'lineAmount') {
        lineAmount = parser.getIntegerValue();
    } else if (text == 'quantity') {
        quantity = parser.getDoubleValue();
    } else if (text == 'reportingDate') {
        reportingDate = parser.getText();
    } else if (text == 'tax') {
        tax = parser.getDoubleValue();
    } else if (text == 'taxableAmount') {
        taxableAmount = parser.getIntegerValue();
    } else if (text == 'taxCalculated') {
        taxCalculated = parser.getDoubleValue();
    } else if (text == 'taxCode') {
        taxCode = parser.getText();
    } else if (text == 'taxDate') {
        taxDate = parser.getText();
    } else if (text == 'taxIncluded') {
        taxIncluded = parser.getBooleanValue();
    } else if (text == 'details') {
        details = new List<Details>();
        while (parser.nextToken() != JSONToken.END_ARRAY) {
            details.add(new Details(parser));
        }
    } else {
        consumeObject(parser);
    }
}
}
}
}

public static JsonSuccessParser parse(String json)
{
    return new JsonSuccessParser(System.JSON.createParser(json));
}
}

```


Prepare your JSON request to call the Avalara endpoint by using the AvalaraJSONBuilder class.

```
public with sharing class AvalaraJSONBuilder
{
    private static AvalaraJSONBuilder avalaraJSONBuilderInstance;

    public static AvalaraJSONBuilder getInstance()
    {
        if (NULL == avalaraJSONBuilderInstance)
        {
            avalaraJSONBuilderInstance = new AvalaraJSONBuilder();
        }
        return avalaraJSONBuilderInstance;
    }

    public String frameJsonForGetTaxOrderItem(commercetax.CalculateTaxRequest
calculateTaxRequest)
    {
        try
        {
            Id accountid = null;
            if(calculateTaxRequest.CustomerDetails.AccountId != null &&
calculateTaxRequest.CustomerDetails.AccountId != '')
                accountid = Id.valueOf(calculateTaxRequest.CustomerDetails.AccountId);

            JSONGenerator jsonGeneratorInstance = JSON.createGenerator(true);
            jsonGeneratorInstance.writeStartObject();
            String type = null;
            if(calculateTaxRequest.taxtype == commercetax.CalculateTaxType.Actual)
                type = 'SalesInvoice';
            else type = 'SalesOrder';
            jsonGeneratorInstance.writeStringField('type', type);
            if(calculateTaxRequest.SellerDetails != null)
                jsonGeneratorInstance.writeStringField('companyCode',
calculateTaxRequest.SellerDetails.code);
            else
                jsonGeneratorInstance.writeStringField('companyCode', 'billing2');
            if(calculateTaxRequest.isCommit != null) {
                jsonGeneratorInstance.writeBooleanField('commit',
calculateTaxRequest.isCommit);
            }
            if(calculateTaxRequest.documentcode != null){
                jsonGeneratorInstance.writeStringField('code',
calculateTaxRequest.documentcode);
            }else if(calculateTaxRequest.referenceEntityId != null) {
                jsonGeneratorInstance.writeStringField('code',
calculateTaxRequest.referenceEntityId);
            }
            if(calculateTaxRequest.CustomerDetails.code == null && accountid !=null)
            {
                Account acc = [select id, name from account where id=:accountid];
                jsonGeneratorInstance.writeStringField('customerCode', acc.name);
            } else {
                jsonGeneratorInstance.writeStringField('customerCode',
calculateTaxRequest.CustomerDetails.code);
            }
        }
    }
}
```

```

    }
    if(calculateTaxRequest.EffectiveDate == null)
        jsonGeneratorInstance.writeDateField('date', system.today());
    else
        jsonGeneratorInstance.writeDateTimeField('date',
calculateTaxRequest.EffectiveDate);

    jsonGeneratorInstance.writeFieldName('lines');
    jsonGeneratorInstance.writeStartArray();
    for(integer i=0;i<1;i++){
        for(Commercetax.TaxLineItemRequest lineItem :
calculateTaxRequest.LineItems)
            {
                jsonGeneratorInstance.writeStartObject();
                if(lineItem.linenummer != null){
                    jsonGeneratorInstance.writeStringField('number',
lineItem.linenummer);
                }
                jsonGeneratorInstance.writeNumberField('quantity',
lineItem.Quantity);
                jsonGeneratorInstance.writeNumberField('amount',
(lineItem.Amount));

                jsonGeneratorInstance.writeStringField('taxCode',lineItem.taxCode);

                jsonGeneratorInstance.writeFieldName('addresses');
                jsonGeneratorInstance.writeStartObject();
                jsonGeneratorInstance.writeFieldName('ShipFrom');
                jsonGeneratorInstance.writeStartObject();
                jsonGeneratorInstance.writeStringField('line1',
lineItem.addresses.shipfrom.street);
                jsonGeneratorInstance.writeStringField('line2',
lineItem.addresses.shipfrom.street);
                jsonGeneratorInstance.writeStringField('city',
lineItem.addresses.shipfrom.city);
                jsonGeneratorInstance.writeStringField('region',
lineItem.addresses.shipfrom.state);
                jsonGeneratorInstance.writeStringField('country',
lineItem.addresses.shipfrom.country);

                jsonGeneratorInstance.writeStringField('postalCode',lineItem.addresses.shipfrom.postalcode);

                jsonGeneratorInstance.writeEndObject();

                jsonGeneratorInstance.writeFieldName('ShipTo');
                jsonGeneratorInstance.writeStartObject();
                jsonGeneratorInstance.writeStringField('line1',
lineItem.addresses.shipto.street);
                jsonGeneratorInstance.writeStringField('line2',
lineItem.addresses.shipto.street);
                jsonGeneratorInstance.writeStringField('city',
lineItem.addresses.shipto.city);
                jsonGeneratorInstance.writeStringField('region',
lineItem.addresses.shipto.state);
            }
    }
}

```

```

        jsonGeneratorInstance.writeStringField('country',
lineItem.addresses.shipto.country);

jsonGeneratorInstance.writeStringField('postalCode',lineItem.addresses.shipto.postalcode);

        jsonGeneratorInstance.writeEndObject();

        jsonGeneratorInstance.writeFieldName('pointOfOrderOrigin');
        jsonGeneratorInstance.writeStartObject();
        jsonGeneratorInstance.writeStringField('line1',
lineItem.addresses.soldto.street);
        jsonGeneratorInstance.writeStringField('line2',
lineItem.addresses.soldto.street);
        jsonGeneratorInstance.writeStringField('city',
lineItem.addresses.soldto.city);
        jsonGeneratorInstance.writeStringField('region',
lineItem.addresses.soldto.state);
        jsonGeneratorInstance.writeStringField('country',
lineItem.addresses.soldto.country);

jsonGeneratorInstance.writeStringField('postalCode',lineItem.addresses.soldto.postalcode);

        jsonGeneratorInstance.writeEndObject();

        if(lineItem.effectiveDate != null)
        {
            jsonGeneratorInstance.writeFieldName('taxOverride');
            jsonGeneratorInstance.writeStartObject();
            jsonGeneratorInstance.writeDateTimeField('taxDate',
lineItem.effectiveDate);
            jsonGeneratorInstance.writeEndObject();
        }
        jsonGeneratorInstance.writeEndObject();
        jsonGeneratorInstance.writeEndObject();
    }
}
    jsonGeneratorInstance.writeEndArray();
    jsonGeneratorInstance.writeEndObject();
    return jsonGeneratorInstance.getAsString();
}
catch (Exception e)
{
    throw e;
}
}
}

```

- Use the `JsonErrorParser` class to extract the error details, if any.

```

global with sharing class JsonErrorParser
{
    public cls_error error;
}

```

```

public class cls_error
{
    public String code;
    public String message;
    public String target;
    public cls_details[] details;
}

public class cls_details
{
    public String code;
    public String message;
    public String description;
    public String faultCode;
    public String helpLink;
    public String severity;
}
public static JsonErrorParser parse(String json)
{
    return (JsonErrorParser) System.JSON.deserialize(json, JsonErrorParser.class);
}
}

```

TaxEngineContext Class

Wrapper class that stores details about the type of a tax calculation request.

Namespace

[CommerceTax](#)

Example

At the beginning of a tax adapter, use `TaxEngineContext` class to pass the value of a request type to an instance of `RequestType`.

```

global virtual class MockAdapter implements commercetax.TaxEngineAdapter {

    global commercetax.TaxEngineResponse processRequest(commercetax.TaxEngineContext
taxEngineContext) {
        commercetax.RequestType requestType = taxEngineContext.getRequestType();
        commercetax.CalculateTaxRequest request =
(commercetax.CalculateTaxRequest) taxEngineContext.getRequest();

```

Build the rest of your adapter based on the type of request that you got from `TaxEngineContext` class.

```

if(requestType == commercetax.RequestType.CalculateTax){
    commercetax.calculatetaxtype type = request.taxtype;
    String docCode='';
    if(request.DocumentCode == 'simulateEmptyDocumentCode')
        docCode = '';
    else if(request.DocumentCode != null)

```

```
        docCode =request.DocumentCode;
    else if(request.ReferenceEntityId != null) docCode = request.ReferenceEntityId;

    else docCode = String.valueOf(getRandomInteger(0,2147483647));
    commercetax.CalculateTaxResponse response = new
commercetax.CalculateTaxResponse();
    if(request.isCommit == true) {
        response.setStatus(commercetax.TaxTransactionStatus.Committed);
    } else {
        response.setStatus(commercetax.TaxTransactionStatus.Uncommitted);
    }
}
```

[TaxEngineContext Constructors](#)

Learn more about the available constructors with the `TaxEngineContext` class.

[TaxEngineContext Methods](#)

Learn more about the available methods with the `TaxEngineContext` class.

TaxEngineContext Constructors

Learn more about the available constructors with the `TaxEngineContext` class.

The `TaxEngineContext` class includes these constructors.

[TaxEngineContext\(request, requestType, namedUri\)](#)

Initializes the `TaxEngineContext` object. This constructor is intended for test usage and throws an exception if used outside of the Apex test context.

TaxEngineContext(request, requestType, namedUri)

Initializes the `TaxEngineContext` object. This constructor is intended for test usage and throws an exception if used outside of the Apex test context.

Signature

```
TaxEngineContext(commercetax.TaxEngineRequest request, commercetax.RequestType
requestType, String namedUri)
```

Parameters

request

Type: `TaxEngineRequest`

Information about the request.

requestType

Type: [RequestType](#)

Whether the tax request is to calculate or estimate tax.

namedUri

Type: `String`

URI that was called as part of the tax calculation request.

TaxEngineContext Methods

Learn more about the available methods with the `TaxEngineContext` class.

The `TaxEngineContext` class includes these methods.

`getNamedUri()`

Retrieves the value of the `NamedUri` field of the `TaxEngineContext` class.

`getRequest()`

Gets the value of the `TaxEngineContext`'s `Request` field.

`getRequestType()`

Gets the value of the `RequestType` field of the `TaxEngineContext` class.

`getNamedUri ()`

Retrieves the value of the `NamedUri` field of the `TaxEngineContext` class.

Signature

```
global String getNamedUri ()
```

Return Value

Type: String

`getRequest ()`

Gets the value of the `TaxEngineContext`'s `Request` field.

Signature

```
global commercetax.TaxEngineRequest getRequest ()
```

Return Value

Type: `TaxEngineRequest`

An implemented instance of an external tax engine's interface for processing requests. We've provided the `TaxEngineRequest` interface for you to test within mock adapters with classes that implement it, such as [CalculateTaxRequest](#). However, don't use it outside of a testing context.

`getRequestType ()`

Gets the value of the `RequestType` field of the `TaxEngineContext` class.

Signature

```
global commercetax.RequestType getRequestType ()
```

Return Value

Type: [RequestType](#)

Indicates whether the calculation request was for actual or calculated tax.

TaxLineItemRequest Class

Contains line item details of a tax request.

Namespace

[CommerceTax](#)

[TaxLineItemRequest Constructors](#)

Learn more about the constructors available with the `TaxLineItemRequest` class.

[TaxLineItemRequest Properties](#)

Learn more about the available properties with the `TaxLineItemRequest` class.

[TaxLineItemRequest Methods](#)

Learn more about the available methods with the `TaxLineItemRequest` class.

TaxLineItemRequest Constructors

Learn more about the constructors available with the `TaxLineItemRequest` class.

The `TaxLineItemRequest` class includes these constructors.

[TaxLineItemRequest\(addresses, amount, description, productCode, quantity, lineNumber, taxCode, effectiveDate\)](#)

Initializes the request for the tax line item. This constructor is intended for test usage and throws an exception if used outside of the Apex test context.

`TaxLineItemRequest(addresses, amount, description, productCode, quantity, lineNumber, taxCode, effectiveDate)`

Initializes the request for the tax line item. This constructor is intended for test usage and throws an exception if used outside of the Apex test context.

Signature

```
global TaxLineItemRequest (commercetax.LineTaxAddressesRequest addresses, Double amount, String description, String productCode, Double quantity, String lineNumber, String taxCode, Datetime effectiveDate)
```

```
commercetax.TaxLineItemRequest, newInstance, [commercetax.LineTaxAddressesRequest, Double, String, String, Double, String, String, Datetime], commercetax.TaxLineItemRequest
```

Parameters

addresses

Type: [LineTaxAddressesRequest](#)

Information about the addresses applied to each line item in a tax calculation request.

amount

Type: Double

Total amount (in a given currency) represented by a line item sent for tax calculation.

description

Type: String

User-defined description for a tax line item.

productCode

Type: String

Catalog code for the product represented by the tax line item.

quantity

Type: Double

Number of units of a given product that the tax line item represents.

lineNumber

Type: String

Unique number used to identify a tax line item.

taxCode

Type: String

Code used to identify how tax is calculated for a tax line item.

effectiveDate

Type: Datetime

This is a user-defined date used for reporting only. For negative invoice lines, this parameter represents the invoice date from the original invoice. In other cases, it represents the date when the tax transaction takes effect on the line item. The previous tax transaction type is always `Debit` for negative invoice lines.

TaxLineItemRequest Properties

Learn more about the available properties with the `TaxLineItemRequest` class.

The `TaxLineItemRequest` class includes these properties.

[addresses](#)

Contains the list of addresses of a line item.

[amount](#)

Total amount (in a given currency) represented by a line item sent for tax calculation.

[customTaxAttributes](#)

Customised tax contract to include additional attributes at the line item level.

[description](#)

User-defined description for a tax line item.

[effectiveDate](#)

The date that a tax transaction takes effect on a line item. This is a user-defined date used for reporting only.

lineNumber

Unique number used to identify a tax line item.

productCode

Catalog code for the product represented by the tax line item.

productSKU

Unique identifier of a product that can be used to identify products that are exempted from tax.

quantity

Number of units of a given product that the tax line item represents.

referenceDocumentCode

Identifier that combines the original invoice ID, previous tax transaction type, and tax engine ID, used in tax calculations for negative invoice lines.

taxCode

Code used to identify how tax is calculated for a tax line item.

addresses

Contains the list of addresses of a line item.

Signature

```
public commercetax.LineTaxAddressesRequest addresses {get; set;}
```

Property Value

Type: [commercetax.LineTaxAddressesRequest](#)

amount

Total amount (in a given currency) represented by a line item sent for tax calculation.

Signature

```
global Double amount {get; set;}
```

Property Value

Type: Double

customTaxAttributes

Customised tax contract to include additional attributes at the line item level.

Signature

```
global commercetax.TaxLineItemRequest customTaxAttributes {get; set;}
```

Property Value

Type: Map<String, Object>

description

User-defined description for a tax line item.

Signature

```
global String description {get; set;}
```

Property Value

Type: String

effectiveDate

The date that a tax transaction takes effect on a line item. This is a user-defined date used for reporting only.

Signature

```
global Datetime effectiveDate {get; set;}
```

Property Value

Type: Datetime

lineNumber

Unique number used to identify a tax line item.

Signature

```
global String lineNumber {get; set;}
```

Property Value

Type: String

productCode

Catalog code for the product represented by the tax line item.

Signature

```
global String productCode {get; set;}
```

Property Value

Type: String

productSKU

Unique identifier of a product that can be used to identify products that are exempted from tax.

Signature

```
global String productSKU {get; set;}
```

Property Value

Type: String

quantity

Number of units of a given product that the tax line item represents.

Signature

```
global Double quantity {get; set;}
```

Property Value

Type: Double

referenceDocumentCode

Identifier that combines the original invoice ID, previous tax transaction type, and tax engine ID, used in tax calculations for negative invoice lines.

For example, a referenceDocumentCode parameter value `3ttxx00000004Bh_Debit-4wAxx000000001EAA` indicates `3ttxx00000004Bh` is the original invoice ID and `4wAxx000000001EAA` is the tax engine ID. The previous tax transaction type is always `Debit` for negative invoice lines.

Signature

```
global String referenceDocumentCode {get; set;}
```

Property Value

Type: String

taxCode

Code used to identify how tax is calculated for a tax line item.

Signature

```
global String taxCode {get; set;}
```

Property Value

Type: String

TaxLineItemRequest Methods

Learn more about the available methods with the `TaxLineItemRequest` class.

The `TaxLineItemRequest` class includes these methods.

`equals(obj)`

Maintains the integrity of lists of type `TaxLineItemRequest` by determining the equality of external objects in a list. This method is dynamic and is based on the `equals()` method in Java.

`hashCode()`

Maintains the integrity of lists of type `TaxLineItemRequest` by determining the uniqueness of the external object records in a list.

`toString()`

Converts a value to a string.

`equals (obj)`

Maintains the integrity of lists of type `TaxLineItemRequest` by determining the equality of external objects in a list. This method is dynamic and is based on the `equals()` method in Java.

Signature

```
global Boolean equals(Object obj)
```

Parameters

obj

Type: Object

External object whose key is to be validated.

Return Value

Type: Boolean

`hashCode ()`

Maintains the integrity of lists of type `TaxLineItemRequest` by determining the uniqueness of the external object records in a list.

Signature

```
global Integer hashCode ()
```

Return Value

Type: Integer

`toString ()`

Converts a value to a string.

Signature

```
global String toString()
```

Return Value

Type: String

TaxSellerDetailsRequest Class

Contains tax code details used in the tax calculation request.

Namespace

[CommerceTax](#)

[TaxSellerDetailsRequest Constructors](#)

Learn more about the available constructors with the `TaxSellerDetailsRequest` class.

[TaxSellerDetailsRequest Properties](#)

Learn more about the available properties with the `TaxSellerDetailsRequest` class.

[TaxSellerDetailsRequest Methods](#)

Learn more about the available methods with the `TaxSellerDetailsRequest` class.

TaxSellerDetailsRequest Constructors

Learn more about the available constructors with the `TaxSellerDetailsRequest` class.

The `TaxSellerDetailsRequest` class includes these constructors.

[TaxSellerDetailsRequest\(code\)](#)

Initializes the request for the tax seller details. This constructor is intended for test usage and throws an exception if used outside of the Apex test context

TaxSellerDetailsRequest (code)

Initializes the request for the tax seller details. This constructor is intended for test usage and throws an exception if used outside of the Apex test context

Signature

```
global TaxSellerDetailsRequest (String code)
```

Parameters

code

Type: String

Tax code used for tax calculation.

TaxSellerDetailsRequest Properties

Learn more about the available properties with the `TaxSellerDetailsRequest` class.

The `TaxSellerDetailsRequest` class includes these properties.

`code`

Tax code used for tax calculation.

code

Tax code used for tax calculation.

Signature

```
global String code {get; set;}
```

Property Value

Type: String

TaxSellerDetailsRequest Methods

Learn more about the available methods with the `TaxSellerDetailsRequest` class.

The `TaxSellerDetailsRequest` class includes these methods.

`equals(obj)`

Maintains the integrity of lists of type `TaxSellerDetailsRequest` by determining the equality of the external objects in a list. This method is dynamic and based on the `equals()` method in Java.

`hashCode()`

Maintains the integrity of lists of type `TaxSellerDetailsRequest` by determining the uniqueness of the external objects in a list.

`toString()`

Converts a value to a string.

equals(obj)

Maintains the integrity of lists of type `TaxSellerDetailsRequest` by determining the equality of the external objects in a list. This method is dynamic and based on the `equals()` method in Java.

Signature

```
global Boolean equals(Object obj)
```

Parameters

obj

Type: Object

External object whose key is to be validated.

Return Value

Type: Boolean

hashCode ()

Maintains the integrity of lists of type `TaxSellerDetailsRequest` by determining the uniqueness of the external objects in a list.

Signature

```
global Integer hashCode ()
```

Return Value

Type: Integer

toString ()

Converts a value to a string.

Signature

```
global String toString ()
```

Return Value

Type: String

TaxTransactionRequest Class

Abstract class for storing customer details used in tax calculation and estimation requests.

Namespace

[CommerceTax](#)

Usage

Specify the `CommerceTax` namespace when creating an instance of this class. The constructor of this class takes no arguments. For example, let's say you create an instance of `CalculateTaxRequest` class, which extends the `TaxTransactionRequest` class.

[TaxTransactionRequest Constructors](#)

Learn more about the available constructors with the `TaxTransactionRequest` class.

[TaxTransactionRequest Properties](#)

Learn more about the available properties with the `TaxTransactionRequest` class.

[TaxTransactionRequest Methods](#)

TaxTransactionRequest Constructors

Learn more about the available constructors with the `TaxTransactionRequest` class.

The `TaxTransactionRequest` class includes these constructors.

```
TaxTransactionRequest(addresses, currencyIsoCode, customerDetails, description, documentCode, referenceDocumentCode,
transactionDate, effectiveDate, lineItems, referenceEntityId, sellerDetails, customTaxAttributes)
```

Initializes the request for the tax transaction. This constructor is intended for test usage and throws an exception if used outside of the Apex test context.

```
TaxTransactionRequest(addresses, currencyIsoCode, customerDetails, description,
documentCode, referenceDocumentCode, transactionDate, effectiveDate, lineItems,
referenceEntityId, sellerDetails, customTaxAttributes)
```

Initializes the request for the tax transaction. This constructor is intended for test usage and throws an exception if used outside of the Apex test context.

Signature

```
global TaxTransactionRequest(commercetax.HeaderTaxAddressesRequest addresses, String
currencyIsoCode, commercetax.TaxCustomerDetailsRequest customerDetails, String
description, String documentCode, String referenceDocumentCode, Datetime transactionDate,
Datetime effectiveDate, List<commercetax.TaxLineItemRequest> lineItems, String
referenceEntityId, commercetax.TaxSellerDetailsRequest sellerDetails, Map<String, Object>
customTaxAttributes)
```

Parameters

addresses

Type: [HeaderTaxAddressesRequest](#)

Tax addresses, such as Ship To and Bill From.

currencyIsoCode

Type: String

Three-letter ISO 4217 currency code associated with the `TaxTransactionRequest`.

customerDetails

Type: [TaxCustomerDetailsRequest](#)

Customer information used in tax calculation.

description

Type: String

Optional user-defined description for providing more information about the tax transaction request.

documentCode

Type: String

Code for documents that are used to provide more information in the tax calculation process.

referenceDocumentCode

Type: String

Identifier that combines the original invoice ID, previous tax transaction type, and tax engine ID, used in tax calculations for negative invoice lines. For example, a `referenceDocumentCode` parameter value `3ttxx00000004Bh_Debit-4wAxx000000001EAA` indicates `3ttxx00000004Bh` is the original invoice ID and `4wAxx000000001EAA` is the tax engine ID.

transactionDate

Type: Datetime

The date that the tax transaction occurred.

effectiveDate

Type: Datetime

The date that the tax transaction takes effect. User-defined and used only for reporting purposes.

lineItems

Type: List<[TaxLineItemRequest](#)>

A list of line items on which tax is calculated.

referenceEntityId

Type: String

ID of an object related to the line items sent for tax calculation.

sellerDetails

Type: [TaxSellerDetailsRequest](#)

Contains tax code information used in a tax calculation request.

customTaxAttributes

Type: Map<String, Object>

Customised tax contract to include additional attributes at the header level.

TaxTransactionRequest Properties

Learn more about the available properties with the `TaxTransactionRequest` class.

The `TaxTransactionRequest` class includes these properties.

[addresses](#)

A list of addresses (such as Ship To and Sold To) used as part of the tax transaction.

[currencyIsoCode](#)

Three-letter ISO 4217 currency code associated with the `TaxTransactionRequest`.

[customerDetails](#)

Customer information used in tax calculation.

[customTaxAttributes](#)

Customised tax contract to include additional attributes at the header level.

[description](#)

Optional user-defined description for providing more information about the tax transaction request.

[documentCode](#)

Code for documents used to provide more information in the tax calculation process.

[effectiveDate](#)

The date that the tax transaction takes effect. User-defined and used only for reporting purposes.

[lineItems](#)

A list of line items on which tax will be calculated.

[referenceDocumentCode](#)

Identifier that combines the original invoice ID, previous tax transaction type, and tax engine ID, used in tax calculations for negative invoice lines.

[referenceEntityId](#)

ID of an object related to the line items sent for tax calculation.

[sellerDetails](#)

Contains tax code information used in a tax calculation request.

[transactionDate](#)

The date that the tax transaction occurred.

addresses

A list of addresses (such as Ship To and Sold To) used as part of the tax transaction.

Signature

```
global commercetax.HeaderTaxAddressesRequest addresses {get; set;}
```

Property Value

Type: [HeaderTaxAddressesRequest](#)

currencyIsoCode

Three-letter ISO 4217 currency code associated with the `TaxTransactionRequest`.

Signature

```
global String currencyIsoCode {get; set;}
```

Property Value

Type: String

customerDetails

Customer information used in tax calculation.

Signature

```
global CommerceTax.TaxCustomerDetailsRequest customerDetails {get; set;}
```

Property Value

Type: [TaxCustomerDetailsRequest](#)

customTaxAttributes

Customised tax contract to include additional attributes at the header level.

Signature

```
global commercetax.TaxTransactionRequest customTaxAttributes {get; set;}
```

Property Value

Type: Map<String, Object>

description

Optional user-defined description for providing more information about the tax transaction request.

Signature

```
global String description {get; set;}
```

Property Value

Type: String

documentCode

Code for documents used to provide more information in the tax calculation process.

Signature

```
global String documentCode {get; set;}
```

Property Value

Type: String

effectiveDate

The date that the tax transaction takes effect. User-defined and used only for reporting purposes.

Signature

```
global Datetime effectiveDate {get; set;}
```

Property Value

Type: Datetime

lineItems

A list of line items on which tax will be calculated.

Signature

```
global List<CommerceTax.TaxLineItemRequest> lineItems {get; set;}
```

Property Value

Type: [List<TaxLineItemRequest>](#)

referenceDocumentCode

Identifier that combines the original invoice ID, previous tax transaction type, and tax engine ID, used in tax calculations for negative invoice lines.

For example, a referenceDocumentCode parameter value `3ttxx00000004Bh_Debit-4wAxx000000001EAA` indicates `3ttxx00000004Bh` is the original invoice ID and `4wAxx000000001EAA` is the tax engine ID.

Signature

```
global String referenceDocumentCode {get; set;}
```

Property Value

Type: String

referenceEntityId

ID of an object related to the line items sent for tax calculation.

Signature

```
global String referenceEntityId {get; set;}
```

Property Value

Type: String

sellerDetails

Contains tax code information used in a tax calculation request.

Signature

```
global commercetax.TaxSellerDetailsRequest sellerDetails {get; set;}
```

Property Value

Type: [TaxSellerDetailsRequest](#)

transactionDate

The date that the tax transaction occurred.

Signature

```
global Datetime transactionDate {get; set;}
```

Property Value

Type: Datetime

TaxTransactionRequest Methods

The following are methods for `TaxTransactionRequest`.

[equals\(obj\)](#)

Maintains the integrity of lists of type `TaxTransactionRequest` by determining the equality of external objects in a list. This method is dynamic and based on the `equals ()` method in Java.

[hashCode\(\)](#)

Maintains the integrity of lists of type `TaxTransactionRequest` by determining the uniqueness of the external object records in a list.

[toString\(\)](#)

Converts a value to a string.

equals (obj)

Maintains the integrity of lists of type `TaxTransactionRequest` by determining the equality of external objects in a list. This method is dynamic and based on the `equals ()` method in Java.

Signature

```
global Boolean equals(Object obj)
```

Parameters

obj

Type: Object

Return Value

Type: Boolean

hashCode ()

Maintains the integrity of lists of type `TaxTransactionRequest` by determining the uniqueness of the external object records in a list.

Signature

```
global Integer hashCode ()
```

Return Value

Type: Integer

toString()

Converts a value to a string.

Signature

```
global String toString()
```

Return Value

Type: String

TaxTransactionStatus Enum

Shows whether the tax transaction has been committed or uncommitted.

Usage

Used by the [CalculateTaxResponse](#) class method.

Enum Values

The `commercetax.TaxTransactionStatus` enum includes these values.

Value	Description
Committed	Tax has been calculated and committed.
Uncommitted	Tax has been calculated but hasn't been committed.

TaxTransactionType Enum

Shows whether the tax transaction is for a credit or debit transaction.

Usage

Used by the [CalculateTaxResponse](#) and [CalculateTaxRequest](#) class methods.

Enum Values

The `commercetax.TaxTransactionType` enum includes these values.

Value	Description
Credit	Represents a credit transaction.
Debit	Represents a debit transaction.

Value	Description
Void	Specifies that the tax engine has voided the document that's mentioned in the <code>referenceDocumentCode</code> property value.

PlaceQuote Namespace

The `PlaceQuote` namespace provides classes and methods to create or update quotes with pricing preferences and configuration options.

 **Note:** This namespace has been deprecated as of API version 63.0. In API version 63.0 and later, use the new [RevSalesTrxn](#) namespace.

The `PlaceQuote` namespace includes these classes.

[CatalogRatesPreferenceEnum Enum](#)

Specifies the rate card entries defined in the catalog that must be fetched for quote line items, with usage-based selling during the quote creation process.

[ConfigurationInputEnum Enum](#)

Specifies the configuration input for the request to place a quote.

[ConfigurationOptionsInput Class](#)

Contains methods and properties to set the configuration options for the input to the product configurator.

[GraphRequest Class](#)

Contains constructors and properties to set the graph ID and a list of records to be ingested. The list of records is specified in a key-value map format that contains the field values of an order.

[PlaceQuoteException Class](#)

Contains methods to hold the exception details for the place quote request.

[PlaceQuoteResponse Class](#)

Contains properties to hold the response to the place quote request.

[PlaceQuoteRLMApexProcessor Class](#)

Contains methods to place a quote with details of the graph request, pricing preferences, and configuration options.

[PricingPreferenceEnum Enum](#)

Specifies the pricing preference during the create quote process.

[RecordResource Class](#)

Contains constructors and properties to create a record object from the field values of a quote.

[RecordWithReferenceRequest Class](#)

Contains constructors and properties to associate a record object with a reference identifier.

CatalogRatesPreferenceEnum Enum

Specifies the rate card entries defined in the catalog that must be fetched for quote line items, with usage-based selling during the quote creation process.

Usage

This enum is available when the Usage-Based Selling feature is enabled.

Enum Values

The `placequote.CatalogRatesPreferenceEnum` enum includes these values.

Value	Description
Fetch	Retrieves the rate card entries defined in the catalog for quote line items during the quote creation process.
Skip	Skips the retrieval of rate card entries for quote line items during the quote creation process. The default value is <code>Skip</code> .

ConfigurationInputEnum Enum

Specifies the configuration input for the request to place a quote.

Usage

Use these enum values for the `configurationInputEnum` property in the [PlaceQuoteRLMApexProcessor](#) class.

Enum Values

The `placequote.ConfigurationInputEnum` enum has these values.

Value	Description
RunAndAllowErrors	Run the configuration and proceed with order ingestion upon encountering any configuration errors.
RunAndBlockErrors	Run the configuration and block order ingestion upon encountering any configuration errors.
Skip	Skip the configuration execution.

ConfigurationOptionsInput Class

Contains methods and properties to set the configuration options for the input to the product configurator.

Namespace

[PlaceQuote](#)

Usage

This class holds the required details of the product configuration input. Set the class properties to enable default configuration, execution of configuration rules, and validation of the product catalog. Use these class properties as an input to the [PlaceQuoteRLMApexProcessor](#) class method.

Example

```
PlaceQuote.GraphRequest graph = new PlaceQuote.GraphRequest('test', listOfRecords);
    PlaceQuote.PricingPreferenceEnum pricingPreference =
PlaceQuote.PricingPreferenceEnum.System;
    PlaceQuote.ConfigurationInputEnum configurationPreference =
PlaceQuote.ConfigurationInputEnum.RunAndAllowErrors;
    PlaceQuote.ConfigurationOptionsInput cInput = new PlaceQuote.ConfigurationOptionsInput();

    cInput.addDefaultConfiguration = true;
    cInput.executeConfigurationRules = true;
    cInput.validateAmendRenewCancel = true;
    cInput.validateProductCatalog = true;
    //Place Quote Call
    PlaceQuote.PlaceQuoteResponse resp =
PlaceQuote.PlaceQuoteRLMApexProcessor.execute(pricingPreference, graph, configurationPreference, cInput);
```

[ConfigurationOptionsInput Properties](#)

Set the `ConfigurationOptionsInput` class properties to add default configuration, execute configuration rules, and validate the product catalog.

[ConfigurationOptionsInput Methods](#)

Learn more about the methods available with the `ConfigurationOptionsInput` class.

ConfigurationOptionsInput Properties

Set the `ConfigurationOptionsInput` class properties to add default configuration, execute configuration rules, and validate the product catalog.

The `ConfigurationOptionsInput` class includes these properties.

[addDefaultConfiguration](#)

Sets the default product configuration, such as bundle and product attributes, for a quote request.

[executeConfigurationRules](#)

Sets the requirement for a quote to adhere to the configuration rules.

[validateAmendRenewCancel](#)

Sets the requirement to run validations related to amend, renew, or cancel processes.

[validateProductCatalog](#)

Sets the requirement to validate a quote against the product catalog.

addDefaultConfiguration

Sets the default product configuration, such as bundle and product attributes, for a quote request.

Signature

```
public Boolean addDefaultConfiguration {get; set;}
```

Property Value

Type: Boolean

Indicates whether to automatically add default configuration to the order (`true`) or not (`false`).

executeConfigurationRules

Sets the requirement for a quote to adhere to the configuration rules.

Signature

```
public Boolean executeConfigurationRules {get; set;}
```

Property Value

Type: Boolean

Indicates whether the order must adhere to configuration rules during processing (`true`) or bypass them (`false`).

validateAmendRenewCancel

Sets the requirement to run validations related to amend, renew, or cancel processes.

Signature

```
public Boolean validateAmendRenewCancel {get; set;}
```

Property Value

Type: Boolean

Indicates whether to run validations related to amend, renew, or cancel processes (`true`) or not (`false`).

validateProductCatalog

Sets the requirement to validate a quote against the product catalog.

Signature

```
public Boolean validateProductCatalog {get; set;}
```

Property Value

Type: Boolean

Indicates whether the quote must be validated against the product catalog (`true`) or not (`false`).

ConfigurationOptionsInput Methods

Learn more about the methods available with the `ConfigurationOptionsInput` class.

The `ConfigurationOptionsInput` class includes these methods.

[equals\(obj\)](#)

Determines the equality of external objects in a list. This method is dynamic and is based on the `equals ()` method in Java.

[hashCode\(\)](#)

Determines the uniqueness of the external object records in a list.

[toString\(\)](#)

Converts a value to a string.

equals (obj)

Determines the equality of external objects in a list. This method is dynamic and is based on the `equals ()` method in Java.

Signature

```
public Boolean equals(Object obj)
```

Parameters

obj

Type: Object

Reference object that's used to compare with the class object.

Return Value

Type: Boolean

Indicates if the class object is same as the reference object (`true`) or not (`false`).

hashCode ()

Determines the uniqueness of the external object records in a list.

Signature

```
public Integer hashCode ()
```

Return Value

Type: Integer

Integer hash code that represents the value of the object. Equal objects as per the `equals ()` method must return the same hash code.

toString ()

Converts a value to a string.

Signature

```
public String toString ()
```

Return Value

Type: String

GraphRequest Class

Contains constructors and properties to set the graph ID and a list of records to be ingested. The list of records is specified in a key-value map format that contains the field values of an order.

Namespace

[PlaceQuote](#)

Example

Invoke the Place Quote Apex API by using these steps.

- Set up a quote and quote line item. To associate the Record object with a reference identifier, create an instance of the `RecordWithReferenceRequest` class.

```
//Quote Setup
PlaceQuote.RecordResource quoteRecord = new
PlaceQuote.RecordResource(Quote.getSubjectType(), 'POST');
Map<String, Object> quoteFieldValues = new Map<String, Object>();
quoteFieldValues.put('Name', 'q-ap12');
quoteFieldValues.put('OpportunityId', '006xx000001aBFcAAM');
quoteFieldValues.put('Pricebook2Id', '01sxx0000005pvRAAQ');
quoteRecord.fieldValues = quoteFieldValues;

//Quote Line Item Setup
PlaceQuote.RecordResource quoteLineItemRecord1 = new
PlaceQuote.RecordResource(QuoteLineItem.getSubjectType(), 'POST');
Map<String, Object> quoteLineItemFieldValues = new Map<String, Object>();
quoteLineItemFieldValues.put('Product2Id', '01txx0000006ibwAAA');
quoteLineItemFieldValues.put('PricebookEntryId', '01luxx0000008zPqAAI');
quoteLineItemFieldValues.put('Quantity', '2.0');
quoteLineItemFieldValues.put('UnitPrice', '5.0');
quoteLineItemFieldValues.put('StartDate', '2023-03-15');
quoteLineItemFieldValues.put('QuoteId', '{@refQuote.id}');
quoteLineItemRecord1.fieldValues = quoteLineItemFieldValues;
PlaceQuote.RecordWithReferenceRequest quoteItemRecords = new
PlaceQuote.RecordWithReferenceRequest('refQuote', quoteRecord);
PlaceQuote.RecordWithReferenceRequest quoteLineItemRecords1 = new
PlaceQuote.RecordWithReferenceRequest('refQuoteItem1', quoteLineItemRecord1);
```

- To create a quote line relationship, create an instance of the `RecordResource` class.

```
PlaceQuote.RecordResource quoteLineRelationship1 = new
PlaceQuote.RecordResource(QuoteLineRelationship.getSubjectType(), 'POST');
Map<String, Object> quoteLineRelationshipValues = new Map<String, Object>();
quoteLineRelationshipValues.put('ProductRelationshipTypeId', '0yoxx0000000JNAAAY');
quoteLineRelationshipValues.put('MainQuoteLineId', '{@refQuoteItem2.id}');
```


```
quoteLineRelationshipValues.put('AssociatedQuoteLineId','@{refQuoteItem1.id}');
quoteLineRelationshipValues.put('AssociatedQuoteLinePricing','IncludedInBundlePrice');

quoteLineRelationship1.fieldValues = quoteLineRelationshipValues;
```

- Create the list of records to be ingested.

```
PlaceQuote.RecordWithReferenceRequest quoteLineRelationship = new
PlaceQuote.RecordWithReferenceRequest('QuoteLineRelationship',quoteLineRelationship1);
List<PlaceQuote.RecordWithReferenceRequest> listOfRecords = new
List<PlaceQuote.RecordWithReferenceRequest>();
listOfRecords.add(quoteItemRecords);
listOfRecords.add(quoteLineItemRecords1);
listOfRecords.add(quoteLineItemRecords2);
listOfRecords.add(quoteLineRelationship);
```

- To contain all record objects, create an instance of the `GraphRequest` class.

 **Note:** The `CatalogRatesPreferenceEnum` enum is available when the Usage-Based Selling feature is enabled.

```
PlaceQuote.GraphRequest graph = new PlaceQuote.GraphRequest('test',listOfRecords);
PlaceQuote.ConfigurationOptionsInput cInput = new
PlaceQuote.ConfigurationOptionsInput();
PlaceQuote.CatalogRatesPreferenceEnum catalogRatesPreference =
PlaceQuote.CatalogRatesPreferenceEnum.Fetch;
...PlaceQuote.ConfigurationInputEnum configurationPreference =
PlaceQuote.ConfigurationInputEnum.RunAndAllowErrors;
PlaceQuote.PricingPreferenceEnum pricingPreference =
PlaceQuote.PricingPreferenceEnum.System;
//System.debug(graph);

//Place Quote Call
PlaceQuote.PlaceQuoteResponse resp =
PlaceQuote.PlaceQuoteRLMApexProcessor.execute(pricingPreference, catalogRatesPreference,
graph, configurationPreference, cInput);
System.debug(resp);
```

[GraphRequest Constructors](#)

Learn more about the available constructors with the `GraphRequest` class.

[GraphRequest Properties](#)

GraphRequest Constructors

Learn more about the available constructors with the `GraphRequest` class.

The `GraphRequest` class includes these constructors.

[GraphRequest\(graphId, records\)](#)

Creates an instance of the `GraphRequest` class to assign the graph ID and a list of records to be ingested.

GraphRequest (graphId, records)

Creates an instance of the `GraphRequest` class to assign the graph ID and a list of records to be ingested.

Signature

```
public GraphRequest(String graphId, List<placequote.RecordWithReferenceRequest> records)
```

Parameters

graphId

Type: String

ID of the graph.

records

Type: List<[placequote.RecordWithReferenceRequest](#) on page 1188>

List of records to be ingested.

GraphRequest Properties

The following are properties for `GraphRequest`.

[graphId](#)

Set the `graphId` property to assign the ID value of the graph.

graphId

Set the `graphId` property to assign the ID value of the graph.

Signature

```
public String graphId {get; set;}
```

Property Value

Type: String

PlaceQuoteException Class

Contains methods to hold the exception details for the place quote request.

Namespace

[PlaceQuote](#)

[PlaceQuoteException Methods](#)

Learn more about the methods available with the `PlaceQuoteException` class.

PlaceQuoteException Methods

Learn more about the methods available with the `PlaceQuoteException` class.

The `PlaceQuoteException` class includes these methods.

[getErrorCode\(\)](#)

Gets the error code that's associated to the place quote request.

getErrorCode ()

Gets the error code that's associated to the place quote request.

Signature

```
public String getErrorCode()
```

Return Value

Type: String

PlaceQuoteResponse Class

Contains properties to hold the response to the place quote request.

Namespace

[PlaceQuote](#)

Example

```
PlaceQuote.PlaceQuoteResponse resp =  
PlaceQuote.PlaceQuoteExecutor.execute(internalEnum, graph);
```

[PlaceQuoteResponse Properties](#)

Learn more about the available properties with the `PlaceQuoteResponse` class.

PlaceQuoteResponse Properties

Learn more about the available properties with the `PlaceQuoteResponse` class.

The `PlaceQuoteResponse` class includes these properties.

[quoteId](#)

Get the ID of the quote that's created after a successful request.

[requestIdentifier](#)

Get the request ID of the process to query the asynchronous status of the Place Quote Apex API.

[responseError](#)

Get the list of errors encountered during the synchronous processing of the API request.

statusURL

Get the asynchronous status URL of the request, if available.

success

Get the request status of the synchronous part of the processing.

quoteId

Get the ID of the quote that's created after a successful request.

Signature

```
public String quoteId {get; set;}
```

Property Value

Type: String

requestIdentifier

Get the request ID of the process to query the asynchronous status of the Place Quote Apex API.

Signature

```
public String requestIdentifier {get; set;}
```

Property Value

Type: String

responseError

Get the list of errors encountered during the synchronous processing of the API request.

Signature

```
public List<ConnectApi.PlaceQuoteErrorResponse> responseError {get; set;}
```

Property Value

Type: List<ConnectApi.PlaceQuoteErrorResponse>

statusURL

Get the asynchronous status URL of the request, if available.

Signature

```
public String statusURL {get; set;}
```


Property Value

Type: String

success

Get the request status of the synchronous part of the processing.

Signature

```
public Boolean success {get; set;}
```

Property Value

Type: Boolean

Indicates whether the synchronous part of the processing is successful (`true`) or not (`false`).

PlaceQuoteRLMApexProcessor Class

Contains methods to place a quote with details of the graph request, pricing preferences, and configuration options.

Namespace

[PlaceQuote](#)

[PlaceQuoteRLMApexProcessor Methods](#)

Learn more about the methods available with the `PlaceQuoteRLMApexProcessor` class.

[PlaceQuoteRLMApexProcessor Example Implementation](#)

To place a quote from Apex, refer to the example implementation of the `PlaceQuoteRLMApexProcessor` class.

PlaceQuoteRLMApexProcessor Methods

Learn more about the methods available with the `PlaceQuoteRLMApexProcessor` class.

The `PlaceQuoteRLMApexProcessor` class includes these methods.

[execute\(pricingPreferenceEnum, graphRequest, configurationInputEnum, configurationOptionsInput\)](#)

Use the method in the `PlaceQuoteExecutor` class to execute the Place Quote Apex API request by assigning the properties for graph request, pricing references, and configuration options.

[execute\(pricingPreferenceEnum, catalogRatesPreference, graphRequest, configurationInputEnum, configurationOptionsInput\)](#)

Use the method in the `PlaceQuoteExecutor` class to execute the Place Quote Apex API request by assigning the properties for graph request, pricing references, and configuration options. This method also includes the property to define fetching of rate card entries.

execute(pricingPreferenceEnum, graphRequest, configurationInputEnum, configurationOptionsInput)

Use the method in the `PlaceQuoteExecutor` class to execute the Place Quote Apex API request by assigning the properties for graph request, pricing references, and configuration options.

Signature

```
public static placequote.PlaceQuoteResponse execute(placequote.PricingPreferenceEnum
pricingPreferenceEnum, placequote.GraphRequest graphRequest,
placequote.ConfigurationInputEnum configurationInputEnum,
placequote.ConfigurationOptionsInput configurationOptionsInput)
```

Parameters

pricingPreferenceEnum

Type: [placequote.PricingPreferenceEnum](#)

Pricing preference during the quote process.

graphRequest

Type: [placequote.GraphRequest](#)

The sObject graph values of the quote payload to be ingested.

configurationInputEnum

Type: [placequote.ConfigurationInputEnum](#)

Configuration input for the quote process.

configurationOptionsInput

Type: [placequote.ConfigurationOptionsInput](#)

Configuration options during the ingestion process.

Return Value

Type: [placequote.PlaceQuoteResponse](#)

execute (pricingPreferenceEnum, catalogRatesPreference, graphRequest, configurationInputEnum, configurationOptionsInput)

Use the method in the `PlaceQuoteExecutor` class to execute the Place Quote Apex API request by assigning the properties for graph request, pricing references, and configuration options. This method also includes the property to define fetching of rate card entries.

Signature

```
public static placequote.PlaceQuoteResponse execute(placequote.PricingPreferenceEnum
pricingPreferenceEnum, placequote.CatalogRatesPreferenceEnum catalogRatesPreference,
placequote.GraphRequest graphRequest, placequote.ConfigurationInputEnum
configurationInputEnum, placequote.ConfigurationOptionsInput configurationOptionsInput)
```

Parameters

pricingPreferenceEnum

Type: [placequote.PricingPreferenceEnum](#)

Pricing preference during the quote process.

catalogRatesPreference

Type: [placequote.CatalogRatesPreferenceEnum](#)

The rate card entries defined in the catalog that must be fetched for quote line items, with usage-based pricing during the quote creation process. The `CatalogRatesPreferenceEnum` enum is available when the Usage-Based Selling feature is enabled.

graphRequest

Type: [placequote.GraphRequest](#)

The sObject graph values of the quote payload to be ingested.

configurationInputEnum

Type: [placequote.ConfigurationInputEnum](#)

Configuration input for the quote process.

configurationOptionsInput

Type: [placequote.ConfigurationOptionsInput](#)

Configuration options during the ingestion process.

Return Value

Type: [placequote.PlaceQuoteResponse](#)

PlaceQuoteRLMApexProcessor Example Implementation

To place a quote from Apex, refer to the example implementation of the `PlaceQuoteRLMApexProcessor` class.

Namespace

[PlaceQuote](#)

Usage

Customize this example to suit your requirements. Create the list of records to be ingested by using these steps. Replace the respective IDs with the values that are present in your org. For example, replace the value of `Pricebook2Id` field with the price book ID that's present in the org.

Example:

- Set up a quote and quote line item. To associate the Record object with a reference identifier, create an instance of the `RecordWithReferenceRequest` class.

```
//Quote Setup
PlaceQuote.RecordResource quoteRecord = new
PlaceQuote.RecordResource(Quote.getSubjectType(), 'POST');
Map<String, Object> quoteFieldValues = new Map<String, Object>();
quoteFieldValues.put('Name', 'q-ap12');
quoteFieldValues.put('OpportunityId', '006xx000001aBFcAAM');
quoteFieldValues.put('Pricebook2Id', '01sxx0000005pvRAAQ');
quoteRecord.fieldValues = quoteFieldValues;

//Quote Line Item Setup
PlaceQuote.RecordResource quoteLineItemRecord1 = new
PlaceQuote.RecordResource(QuoteLineItem.getSubjectType(), 'POST');
Map<String, Object> quoteLineItemFieldValues = new Map<String, Object>();
quoteLineItemFieldValues.put('Product2Id', '01txx0000006ibwAAA');
quoteLineItemFieldValues.put('PricebookEntryId', '01luxx0000008zPqAAI');
```

```

quoteLineItemFieldValues.put('Quantity','2.0');
quoteLineItemFieldValues.put('UnitPrice','5.0');
quoteLineItemFieldValues.put('StartDate','2023-03-15');
quoteLineItemFieldValues.put('QuoteId','@{refQuote.id}');
quoteLineItemRecord1.fieldValues = quoteLineItemFieldValues;
PlaceQuote.RecordWithReferenceRequest quoteItemRecords = new
PlaceQuote.RecordWithReferenceRequest('refQuote',quoteRecord);
PlaceQuote.RecordWithReferenceRequest quoteLineItemRecords1 = new
PlaceQuote.RecordWithReferenceRequest('refQuoteItem1',quoteLineItemRecord1);

```

- To create a quote line relationship, create an instance of the RecordResource class.

```

PlaceQuote.RecordResource quoteLineRelationship1 = new
PlaceQuote.RecordResource(QuoteLineRelationship.getSubjectType(),'POST');
Map<String,Object> quoteLineRelationshipValues = new Map<String,Object>();
quoteLineRelationshipValues.put('ProductRelationshipTypeId','0yox00000000JNAAY');

quoteLineRelationshipValues.put('MainQuoteLineId','@{refQuoteItem2.id}');
quoteLineRelationshipValues.put('AssociatedQuoteLineId','@{refQuoteItem1.id}');

quoteLineRelationshipValues.put('AssociatedQuoteLinePricing','IncludedInBundlePrice');

quoteLineRelationship1.fieldValues = quoteLineRelationshipValues;

```

- Create the list of records to be ingested.


```

PlaceQuote.RecordWithReferenceRequest quoteLineRelationship = new
PlaceQuote.RecordWithReferenceRequest('QuoteLineRelationship',quoteLineRelationship1);

List<PlaceQuote.RecordWithReferenceRequest> listOfRecords = new
List<PlaceQuote.RecordWithReferenceRequest>();
listOfRecords.add(quoteItemRecords);
listOfRecords.add(quoteLineItemRecords1);
listOfRecords.add(quoteLineItemRecords2);
listOfRecords.add(quoteLineRelationship);

```

- To contain all record objects, create an instance of the GraphRequest class.

 **Note:** The CatalogRatesPreferenceEnum enum is available when the Usage-Based Selling feature is enabled.

```

PlaceQuote.GraphRequest graph = new PlaceQuote.GraphRequest('test',listOfRecords);

PlaceQuote.ConfigurationOptionsInput cInput = new
PlaceQuote.ConfigurationOptionsInput();
PlaceQuote.CatalogRatesPreferenceEnum catalogRatesPreference =
PlaceQuote.CatalogRatesPreferenceEnum.Fetch;
...PlaceQuote.ConfigurationInputEnum configurationPreference =
PlaceQuote.ConfigurationInputEnum.RunAndAllowErrors;
PlaceQuote.PricingPreferenceEnum pricingPreference =
PlaceQuote.PricingPreferenceEnum.System;
//System.debug(graph);

```

```
//Place Quote Call
PlaceQuote.PlaceQuoteResponse resp =
PlaceQuote.PlaceQuoteRLMapexProcessor.execute(pricingPreference,
catalogRatesPreference, graph, configurationPreference, cInput);
System.debug(resp);
```

PricingPreferenceEnum Enum

Specifies the pricing preference during the create quote process.

Usage

Used by the [PlaceQuoteRLMapexProcessor](#) class.

Enum Values

The `placequote.PricingPreferenceEnum` enum class includes these values.

Value	Description
Force	Enforce pricing during the quote ingestion process.
Skip	Skip pricing during the quote ingestion process.
System	Determine whether a pricing calculation is required.

RecordResource Class

Contains constructors and properties to create a record object from the field values of a quote.

Namespace

[PlaceQuote](#)

Example

```
PlaceQuote.RecordResource quoteLineRelationship1 = new
PlaceQuote.RecordResource(QuoteLineRelationship.getSubjectType(), 'POST');
```

See [PlaceQuoteRLMapexProcessor](#) to refer to an example implementation.

[RecordResource Constructors](#)

Learn more about the available constructors with the `RecordResource` class.

[RecordResource Properties](#)

Learn more about the available properties with the `RecordResource` class.

RecordResource Constructors

Learn more about the available constructors with the `RecordResource` class.

The `RecordResource` class includes these constructors.

[RecordResource\(type, method, id\)](#)

Creates an instance of the `RecordResource` class to assign values to the fields of a quote item by using the `sObject` type, API method, and quote ID properties.

[RecordResource\(type, method\)](#)

Creates an instance of the `RecordResource` class to assign the values to the fields of a quote item by using the `sObject` type and API method properties.

RecordResource (type, method, id)

Creates an instance of the `RecordResource` class to assign values to the fields of a quote item by using the `sObject` type, API method, and quote ID properties.

Signature

```
public RecordResource (Schema.SObjectType type, String method, Id id)
```

Parameters

type

Type: [Schema.SObjectType](#)

Object that's returned from the field describe result using the `getReferenceTo ()` method or from the `sObject` describe result using the `getSObjectType ()` method.

method

Type: String

Method for the API request, such as POST or PATCH.

id

Type: Id

ID of the quote.

RecordResource (type, method)

Creates an instance of the `RecordResource` class to assign the values to the fields of a quote item by using the `sObject` type and API method properties.

Signature

```
public RecordResource (Schema.SObjectType type, String method)
```

Parameters

type

Type: [Schema.SObjectType](#)

Object that's returned from the field describe result using the `getReferenceTo ()` method or from the sObject describe result using the `getSObjectType ()` method.

method

Type: String

Method for the API request, such as POST or PATCH.

RecordResource Properties

Learn more about the available properties with the `RecordResource` class.

The `RecordResource` class includes these properties.

[fieldValues](#)

Set the `fieldValues` property to assign values to the fields to update the quote record.

[id](#)

Set the `id` property to assign the ID of the quote record.

[method](#)

Set the `method` property to specify the API request method, such as POST or PATCH.

[type](#)

Set the `type` property to assign the object type that's returned from the field describe result by using the `getReferenceTo ()` method or from the sObject describe result by using the `getSObjectType ()` method.

fieldValues

Set the `fieldValues` property to assign values to the fields to update the quote record.

Signature

```
public Map<String,ANY> fieldValues {get; set;}
```

Property Value

Type: [List](#) <Map<String,ANY>>

id

Set the `id` property to assign the ID of the quote record.

Signature

```
public String id {get; set;}
```

Property Value

Type: String

method

Set the `method` property to specify the API request method, such as POST or PATCH.

Signature

```
public String method {get; set;}
```

Property Value

Type: String

type

Set the `type` property to assign the object type that's returned from the field describe result by using the `getReferenceTo ()` method or from the `sObject` describe result by using the `getSObjectType ()` method.

Signature

```
public Schema.SObjectType type {get; set;}
```

Property Value

Type: [Schema.SObjectType](#)

RecordWithReferenceRequest Class

Contains constructors and properties to associate a record object with a reference identifier.

Namespace

[PlaceQuote](#)

Example

```
PlaceQuote.RecordWithReferenceRequest quoteLineRelationship = new  
PlaceQuote.RecordWithReferenceRequest ('QuoteLineRelationship', quoteLineRelationship1);
```

See [PlaceQuoteRLMApexProcessor](#) to refer to an example implementation.

[RecordWithReferenceRequest Constructors](#)

Learn more about the available constructors with the `RecordWithReferenceRequest` class.

[RecordWithReferenceRequest Properties](#)

Learn more about the available properties with the `RecordWithReferenceRequest` class.

RecordWithReferenceRequest Constructors

Learn more about the available constructors with the `RecordWithReferenceRequest` class.

The `RecordWithReferenceRequest` class includes these constructors.

[RecordWithReferenceRequest\(referenceId, record\)](#)

Creates an instance of the `RecordWithReferenceRequest` class to associate a record object with a reference identifier by using the `referenceId` and `record` object properties.

RecordWithReferenceRequest(referenceId, record)

Creates an instance of the `RecordWithReferenceRequest` class to associate a record object with a reference identifier by using the `referenceId` and `record` object properties.

Signature

```
public RecordWithReferenceRequest(String referenceId, placequote.RecordResource record)
```

Parameters

referenceId

Type: String

Reference ID that maps to the subrequest response and can be used to reference the response in subsequent subrequests. You can reference the `referenceId` in either the body or URL of a subrequest. Use this syntax to include a reference: `@{referenceId.FieldName}`. See [referenceId property of a composite subrequest](#).

record

Type: [placequote.RecordResource](#)

Record object that's defined using the `RecordResource` class.

RecordWithReferenceRequest Properties

Learn more about the available properties with the `RecordWithReferenceRequest` class.

The `RecordWithReferenceRequest` class includes these properties.

[record](#)

Set the `record` property to specify the record object that's defined by using the `RecordResource` class.

[referenceId](#)

Set the `referenceId` property to specify the reference ID that maps to the subrequest response. This reference ID can be used to reference the response in subsequent subrequests.

record

Set the `record` property to specify the record object that's defined by using the `RecordResource` class.

Signature

```
public placequote.RecordResource record {get; set;}
```

Property Value

Type: [placequote.RecordResource](#)

referenceId

Set the `referenceId` property to specify the reference ID that maps to the subrequest response. This reference ID can be used to reference the response in subsequent subrequests.

Signature

```
public String referenceId {get; set;}
```

Property Value

Type: String

RevSalesTrxn Namespace

Create a sales transaction, such as a quote or an order, with integrated pricing and configuration. Additionally, update an order or a quote, and insert and delete order or quote line items to calculate the estimated tax.

The `RevSalesTrxn` namespace includes these classes.

[CatalogRatesPreferenceEnum Enum](#)

Specifies the rate card entries defined in the catalog that must be fetched for quote line items, with usage-based selling during the place sales transaction process.

[ConfigurationExecutionEnum Enum](#)

Specifies the configuration method for the place sales transaction request.

[ConfigurationOptionsInput Class](#)

Contains methods and properties to set the configuration options for the input to the product configurator.

[GraphRequest Class](#)

Contains constructors and properties to set the graph ID and a list of records to be ingested. The list of records is specified in a key-value map format that contains field values.

[GroupRampActionEnum Enum](#)

Specifies the action that you want to perform on group ramp segments. Additionally, you can also convert a non-ramped group into a ramped group.

[PlaceSalesTransactionException Class](#)

Contains methods to hold the exception details for the place sales transaction request.

[PlaceSalesTransactionExecutor Class](#)

Contains methods to place a sales transaction with details of the graph request, pricing preferences, and configuration options.

[PlaceSalesTransactionResponse Class](#)

Contains properties to hold the response to the place sales transaction request.

[PricingPreferenceEnum Enum](#)

Specifies the pricing preference during the creation of a sales transaction.

[RecordResource Class](#)

Contains constructors and properties to create a record object from the field values of a sales transaction.

[RecordWithReferenceRequest Class](#)

Contains constructors and properties to associate a record object with a reference identifier.

[TaxPreferenceEnum Enum](#)

Specifies whether to execute or skip the tax calculation step for each sales transaction record. Available in API version 65.0 and later.

CatalogRatesPreferenceEnum Enum

Specifies the rate card entries defined in the catalog that must be fetched for quote line items, with usage-based selling during the place sales transaction process.

Usage

This enum is available when the Usage-Based Selling feature is enabled.

Enum Values

The `RevSalesTrxn.CatalogRatesPreferenceEnum` enum includes these values.

Value	Description
Fetch	Retrieves the rate card entries defined in the catalog for quote line items during the quote creation process.
Skip	Skips the retrieval of rate card entries for quote line items during the quote creation process. The default value is <code>Skip</code> .

ConfigurationExecutionEnum Enum

Specifies the configuration method for the place sales transaction request.

Usage

Use these enum values for the `configurationExecutionEnum` property in the [PlaceSalesTransactionExecutor](#) class.

Enum Values

The `RevSalesTrxn.ConfigurationExecutionEnum` enum has these values.

Value	Description
Force	Specifies to enforce the predefined configuration process during the sales transaction process.
Skip	Specifies to skip the configuration process during the quote creation process. The default value is <code>Skip</code> .
System	Specifies the system to determine whether the configuration process is required.

ConfigurationOptionsInput Class

Contains methods and properties to set the configuration options for the input to the product configurator.

Namespace

[RevSalesTrxn](#)

Usage

This class holds the required details of the product configuration input. Set the class properties to enable default configuration, execution of configuration rules, and validation of the product catalog. Use these class properties as an input to the [PlaceSalesTransactionExecutor](#) class method.

Example

```

        RevSalesTrxn.GraphRequest graph = new RevSalesTrxn.GraphRequest('test',
listOfRecords);
        RevSalesTrxn.PricingPreferenceEnum pricingPrefEnum =
RevSalesTrxn.PricingPreferenceEnum.SYSTEM;
        RevSalesTrxn.ConfigurationExecutionEnum configurationExecutionEnum =
RevSalesTrxn.ConfigurationExecutionEnum.SYSTEM;
        RevSalesTrxn.ConfigurationOptionsInput cInput = new
RevSalesTrxn.ConfigurationOptionsInput();
        cInput.addDefaultConfiguration = true;
        cInput.executeConfigurationRules = true;
        cInput.validateAmendRenewCancel = true;
        cInput.validateProductCatalog = true;
        //Place Sales Transaction API Call
        RevSalesTrxn.PlaceSalesTransactionResponse resp =
PlaceQuote.PlaceSalesTransactionExecutor.execute(graph,pricingPrefEnum,configurationExecutionEnum,cInput,null);

```

[ConfigurationOptionsInput Properties](#)

Set the ConfigurationOptionsInput class properties to add default configuration, execute configuration rules, and validate the product catalog.

[ConfigurationOptionsInput Methods](#)

Learn more about the methods available with the ConfigurationOptionsInput class.

ConfigurationOptionsInput Properties

Set the ConfigurationOptionsInput class properties to add default configuration, execute configuration rules, and validate the product catalog.

The ConfigurationOptionsInput class includes these properties.

[addDefaultConfiguration](#)

Sets the default product configuration, such as bundle and product attributes, for a quote request.

[executeConfigurationRules](#)

Sets the requirement for a quote to adhere to the configuration rules.

[validateAmendRenewCancel](#)

Sets the requirement to run validations related to amend, renew, or cancel processes.

[validateProductCatalog](#)

Sets the requirement to validate a quote against the product catalog.

addDefaultConfiguration

Sets the default product configuration, such as bundle and product attributes, for a quote request.

Signature

```
public Boolean addDefaultConfiguration {get; set;}
```

Property Value

Type: Boolean

Indicates whether to automatically add default configuration to the order (`true`) or not (`false`).

executeConfigurationRules

Sets the requirement for a quote to adhere to the configuration rules.

Signature

```
public Boolean executeConfigurationRules {get; set;}
```

Property Value

Type: Boolean

Indicates whether the order must adhere to configuration rules during processing (`true`) or bypass them (`false`).

validateAmendRenewCancel

Sets the requirement to run validations related to amend, renew, or cancel processes.

Signature

```
public Boolean validateAmendRenewCancel {get; set;}
```

Property Value

Type: Boolean

Indicates whether to run validations related to amend, renew, or cancel processes (`true`) or not (`false`).

validateProductCatalog

Sets the requirement to validate a quote against the product catalog.

Signature

```
public Boolean validateProductCatalog {get; set;}
```

Property Value

Type: Boolean

Indicates whether the quote must be validated against the product catalog (`true`) or not (`false`).

ConfigurationOptionsInput Methods

Learn more about the methods available with the `ConfigurationOptionsInput` class.

The `ConfigurationOptionsInput` class includes these methods.

`equals(obj)`

Determines the equality of external objects in a list. This method is dynamic and is based on the `equals()` method in Java.

`hashCode()`

Determines the uniqueness of the external object records in a list.

`toString()`

Converts a value to a string.

`equals (obj)`

Determines the equality of external objects in a list. This method is dynamic and is based on the `equals()` method in Java.

Signature

```
public Boolean equals(Object obj)
```

Parameters

obj

Type: Object

Reference object that's used to compare with the class object.

Return Value

Type: Boolean

Indicates if the class object is same as the reference object (`true`) or not (`false`).

`hashCode ()`

Determines the uniqueness of the external object records in a list.

Signature

```
public Integer hashCode()
```

Return Value

Type: Integer

Integer hash code that represents the value of the object. Equal objects as per the `equals ()` method must return the same hash code.

toString ()

Converts a value to a string.

Signature

```
public String toString()
```

Return Value

Type: String

GraphRequest Class

Contains constructors and properties to set the graph ID and a list of records to be ingested. The list of records is specified in a key-value map format that contains field values.

Namespace

[RevSalesTrxn](#)

[GraphRequest Constructors](#)

Learn more about the available constructors with the GraphRequest class.

[GraphRequest Properties](#)

Learn more about the available properties with the GraphRequest class.

GraphRequest Constructors

Learn more about the available constructors with the GraphRequest class.

The `GraphRequest` class includes these constructors.

[GraphRequest\(graphId, records\)](#)

Creates an instance of the GraphRequest class to assign the graph ID and a list of records to be ingested.

GraphRequest (graphId, records)

Creates an instance of the GraphRequest class to assign the graph ID and a list of records to be ingested.

Signature

```
public GraphRequest(String graphId, List<RevSalesTrxn.RecordWithReferenceRequest>  
records)
```

Parameters

graphId

Type: String

ID of the graph.

records

Type: List<[revsalestrxn.RecordWithReferenceRequest](#) on page 1210>

List of records to be ingested.

GraphRequest Properties

Learn more about the available properties with the GraphRequest class.

The `GraphRequest` class includes these properties.

[graphId](#)

Set the `graphId` property to assign the ID value of the graph.

graphId

Set the `graphId` property to assign the ID value of the graph.

Signature

```
public String graphId {get; set;}
```

Property Value

Type: String

GroupRampActionEnum Enum

Specifies the action that you want to perform on group ramp segments. Additionally, you can also convert a non-ramped group into a ramped group.

Enum Values

The `RevSalesTrxn.GroupRampActionEnum` enum includes these values.

Value	Description
<code>AddProducts</code>	Specifies to add rampable products to group ramp segments.
<code>DeleteProducts</code>	Specifies to delete ramped products.
<code>EditGroup</code>	Specifies to convert a non-ramped group into a group ramp segment, or edit group ramp segment attributes such as name and description, except the start and end dates.
<code>EditRampSchedule</code>	Specifies to edit details of the group ramp segments, including start and end dates.
<code>DeleteSegment</code>	Specifies to delete the first or last segment in a group ramp schedule.
<code>ConvertToNonRampedGroup</code>	Specifies to convert the first or last group ramp segment into a non-ramped group.

To add or delete ramped line items from multiple group ramp segments, pass all the applicable values in the `graph` request. To refer to Connect API examples that specify actions to create ramp deals for groups, see [Group Ramp Action Input](#) on page 1003.

PlaceSalesTransactionException Class

Contains methods to hold the exception details for the place sales transaction request.

Namespace

[RevSalesTrxn](#)

[PlaceSalesTransactionException Methods](#)

Learn more about the methods available with the `PlaceSalesTransactionException` class.

PlaceSalesTransactionException Methods

Learn more about the methods available with the `PlaceSalesTransactionException` class.

The `PlaceSalesTransactionException` class includes these methods.

[getErrorCode\(\)](#)

Gets the error code that's associated to the place sales transaction request.

getErrorCode ()

Gets the error code that's associated to the place sales transaction request.

Signature

```
public String getErrorCode()
```

Return Value

Type: String

PlaceSalesTransactionExecutor Class

Contains methods to place a sales transaction with details of the graph request, pricing preferences, and configuration options.

Namespace

[RevSalesTrxn](#)

[PlaceSalesTransactionExecutor Methods](#)

Learn more about the methods available with the `PlaceSalesTransactionExecutor` class.

[PlaceSalesTransactionExecutor Example Implementation](#)

To place a sales transaction from Apex, refer to the example implementation of the `PlaceSalesTransactionExecutor` class.

PlaceSalesTransactionExecutor Methods

Learn more about the methods available with the `PlaceSalesTransactionExecutor` class.

The `PlaceSalesTransactionExecutor` class includes these methods.

[execute\(graphRequest, pricingPreferenceEnum, configurationExecutionEnum, configuratorOptions, id\)](#)

Use the method in the `PlaceSalesTransactionExecutor` class to execute the Place Sales Transaction Apex API request by assigning the properties for graph request, pricing references, and configurator options.

[execute\(graphRequest, pricingPreferenceEnum, configurationExecutionEnum, configuratorOptions, id, catalogRatesPreferenceEnum\)](#)

Use the method in the `PlaceSalesTransactionExecutor` class to execute the Place Sales Transaction Apex API request by assigning the properties for graph request, pricing references, configurator options, and catalog rates.

execute(graphRequest, pricingPreferenceEnum, configurationExecutionEnum, configuratorOptions, id)

Use the method in the `PlaceSalesTransactionExecutor` class to execute the Place Sales Transaction Apex API request by assigning the properties for graph request, pricing references, and configurator options.

Signature

```
public static revsalestrxn.PlaceSalesTransactionResponse
execute(revsalestrxn.GraphRequest graphRequest, revsalestrxn.PricingPreferenceEnum
pricingPreferenceEnum, revsalestrxn.ConfigurationExecutionEnum
configurationExecutionEnum, revsalestrxn.ConfiguratorOptions configuratorOptions,
revsalestrxn.Id id)
```

Parameters

graphRequest

Type: [revsalestrxn.GraphRequest](#)

The sObject graph values of the order payload to be ingested.

pricingPreferenceEnum

Type: [revsalestrxn.PricingPreferenceEnum](#)

Pricing preference during the sales transaction process.

configurationExecutionEnum

Type: [revsalestrxn.ConfigurationExecutionEnum](#)

Configuration method for the sales transaction request.

configuratorOptions

Type: [revsalestrxn.ConfigurationOptionsInput](#)

Configuration options during the creation of the sales transaction.

id

Type: String

ID to assign to the sales transaction.

Return Value

Type: [revsalestrxn.PlaceSalesTransactionResponse](#)

execute(graphRequest, pricingPreferenceEnum, configurationExecutionEnum, configuratorOptions, id, catalogRatesPreferenceEnum)

Use the method in the `PlaceSalesTransactionExecutor` class to execute the Place Sales Transaction Apex API request by assigning the properties for graph request, pricing references, configurator options, and catalog rates.

Signature

```
public static revsalestrxn.PlaceSalesTransactionResponse
execute(revsalestrxn.GraphRequest graphRequest, revsalestrxn.PricingPreferenceEnum
pricingPreferenceEnum, revsalestrxn.ConfigurationExecutionEnum
configurationExecutionEnum, revsalestrxn.ConfiguratorOptions configuratorOptions,
revsalestrxn.Id id, revsalestrxn.CatalogRatesPreferenceEnum catalogRatesPreferenceEnum)
```

Parameters

graphRequest

Type: [revsalestrxn.GraphRequest](#)

The sObject graph values of the order payload to be ingested.

pricingPreferenceEnum

Type: [revsalestrxn.PricingPreferenceEnum](#)

Pricing preference during the sales transaction process.

configurationExecutionEnum

Type: [revsalestrxn.ConfigurationExecutionEnum](#)

Configuration method for the sales transaction request.

configuratorOptions

Type: [revsalestrxn.ConfigurationOptionsInput](#)

Configuration options during the creation of the sales transaction.

id

Type: String

ID to assign to the sales transaction.

catalogRatesPreferenceEnum

Type: [revsalestrxn.CatalogRatesPreferenceEnum](#)

Rate card entries defined in the catalog that must be fetched for quote line items, with usage-based selling during the place sales transaction process.

Return Value

Type: [revsalestrxn.PlaceSalesTransactionResponse](#)

PlaceSalesTransactionExecutor Example Implementation

To place a sales transaction from Apex, refer to the example implementation of the `PlaceSalesTransactionExecutor` class.

Namespace

[RevSalesTrxn](#)

Usage

Customize this example to suit your requirements. Create the list of records to be ingested by using these steps. Replace the respective IDs with the values that are present in your org. For example, replace the value of `Pricebook2Id` field with the price book ID that's present in the org.

Example:

- Set up a quote and quote line item. To associate the Record object with a reference identifier, create an instance of the `RecordWithReferenceRequest` class.
- To create a quote line relationship, create an instance of the `RecordResource` class.
- Create the list of records to be ingested.
- To contain all record objects, create an instance of the `GraphRequest` class.

This example shows a sample request to create a sales transaction, to update a quote with a quote line item, or to delete a quote line item.

```
public class PlaceSalesTransactionTest {
    public static void callPSTAPI_Post() {
        RevSalesTrxn.PricingPreferenceEnum pricingPrefEnum =
RevSalesTrxn.PricingPreferenceEnum.SYSTEM;
        RevSalesTrxn.ConfigurationExecutionEnum configurationExecutionEnum =
RevSalesTrxn.ConfigurationExecutionEnum.SYSTEM;
        RevSalesTrxn.TaxPreferenceEnum taxPrefEnum = RevSalesTrxn.TaxPreferenceEnum.SKIP;

        RevSalesTrxn.PersistPreferenceEnum persistPrefEnum =
RevSalesTrxn.PersistPreferenceEnum.SKIP;

        //Quote setup
        RevSalesTrxn.RecordResource quoteRecord = new
RevSalesTrxn.RecordResource(Quote.getSubjectType(), 'POST');
        Map<String, Object> quoteFieldValues = new Map<String, Object>();
        quoteFieldValues.put('Name', 'q-ap12');
        quoteFieldValues.put('OpportunityId', '006xx000001a3e8AAA');
        quoteFieldValues.put('Pricebook2Id', '01sDU00000JRX8YAO');
        quoteRecord.fieldValues = quoteFieldValues;

        //Quote line item setup

        //1st quote line item
        RevSalesTrxn.RecordResource quoteLineItemRecord1 = new
RevSalesTrxn.RecordResource(QuoteLineItem.getSubjectType(), 'POST');
        Map<String, Object> quoteLineItemFieldValues = new Map<String, Object>();
        quoteLineItemFieldValues.put('Product2Id', '01txx0000006i7JAAQ');
        quoteLineItemFieldValues.put('PricebookEntryId', '01luxx0000008yc6AAA');
        quoteLineItemFieldValues.put('Quantity', '2.0');
        quoteLineItemFieldValues.put('UnitPrice', '1000');
        quoteLineItemFieldValues.put('StartDate', '2025-03-15');
        quoteLineItemFieldValues.put('QuoteId', '{@refQuote.id}');
        quoteLineItemRecord1.fieldValues = quoteLineItemFieldValues;
        RevSalesTrxn.RecordWithReferenceRequest quoteItemRecords = new
```

```

RevSalesTrxn.RecordWithReferenceRequest('refQuote', quoteRecord);
    RevSalesTrxn.RecordWithReferenceRequest quoteLineItemRecords1 = new
RevSalesTrxn.RecordWithReferenceRequest('refQuoteItem1', quoteLineItemRecord1);

    //2nd quote line item
    RevSalesTrxn.RecordResource quoteLineItemRecord2 = new
RevSalesTrxn.RecordResource(QuoteLineItem.getSubjectType(), 'POST');
    Map<String, Object> quoteLineItemFieldValues2 = new Map<String, Object>();
    quoteLineItemFieldValues2.put('Product2Id', '01txx0000006i7RAAQ');
    quoteLineItemFieldValues2.put('PricebookEntryId', '01uxx0000008ybvAAA');
    quoteLineItemFieldValues2.put('Quantity', '2.0');
    quoteLineItemFieldValues2.put('UnitPrice', '7.0');
    quoteLineItemFieldValues2.put('StartDate', '2025-03-15');
    quoteLineItemFieldValues2.put('QuoteId', '{@refQuote.id}');
    quoteLineItemRecord2.fieldValues = quoteLineItemFieldValues2;
    RevSalesTrxn.RecordWithReferenceRequest quoteLineItemRecords2 = new
RevSalesTrxn.RecordWithReferenceRequest('refQuoteItem2', quoteLineItemRecord2);

    List<RevSalesTrxn.RecordWithReferenceRequest> listOfRecords = new
List<RevSalesTrxn.RecordWithReferenceRequest>();
    listOfRecords.add(quoteItemRecords);
    listOfRecords.add(quoteLineItemRecords1);
    listOfRecords.add(quoteLineItemRecords2);

    RevSalesTrxn.GraphRequest graph = new
RevSalesTrxn.GraphRequest('test', listOfRecords);
    System.debug(graph);

    //Place Sales Transaction API call
    RevSalesTrxn.PlaceSalesTransactionResponse resp =
RevSalesTrxn.PlaceSalesTransactionExecutor.execute(graph, pricingPrefEnum,
configurationExecutionEnum, new RevSalesTrxn.ConfigurationOptionsInput(), null,
null, taxPrefEnum, persistPrefEnum);
    System.debug(resp);
}

public static void callPSTAPI_Patch() {

    //Apex test to update a quote with a quote line item
    RevSalesTrxn.PricingPreferenceEnum pricingPrefEnum =
RevSalesTrxn.PricingPreferenceEnum.SYSTEM;
    RevSalesTrxn.ConfigurationExecutionEnum configurationExecutionEnum =
RevSalesTrxn.ConfigurationExecutionEnum.SYSTEM;
    RevSalesTrxn.TaxPreferenceEnum taxPrefEnum = RevSalesTrxn.TaxPreferenceEnum.SKIP;

    RevSalesTrxn.PersistPreferenceEnum persistPrefEnum =
RevSalesTrxn.PersistPreferenceEnum.SKIP;

    //Quote setup
    RevSalesTrxn.RecordResource quoteRecord = new
RevSalesTrxn.RecordResource(Quote.getSubjectType(), 'PATCH', '0Q0xx0000004CYsCAM');
    RevSalesTrxn.RecordWithReferenceRequest quoteItemRecords = new
RevSalesTrxn.RecordWithReferenceRequest('refQuote', quoteRecord);

```

```

        //Quote line item setup
        //New quote line item
        RevSalesTrxn.RecordResource quoteLineItemRecord = new
RevSalesTrxn.RecordResource(QuoteLineItem.getSubjectType(), 'POST');
        Map<String, Object> quoteLineItemFieldValues = new Map<String, Object>();
        quoteLineItemFieldValues.put('Product2Id', '01txx0000006i7KAAQ');
        quoteLineItemFieldValues.put('PricebookEntryId', '0luxx0000008ycFAAQ');
        quoteLineItemFieldValues.put('Quantity', '2.0');
        quoteLineItemFieldValues.put('UnitPrice', '7.0');
        quoteLineItemFieldValues.put('StartDate', '2025-03-15');
        quoteLineItemFieldValues.put('QuoteId', '@{refQuote.id}');
        quoteLineItemRecord.fieldValues = quoteLineItemFieldValues;
        RevSalesTrxn.RecordWithReferenceRequest quoteLineItemRecords = new
RevSalesTrxn.RecordWithReferenceRequest('refQuoteItem', quoteLineItemRecord);
        List<RevSalesTrxn.RecordWithReferenceRequest> listOfRecords = new
List<RevSalesTrxn.RecordWithReferenceRequest>();
        listOfRecords.add(quoteItemRecords);
        listOfRecords.add(quoteLineItemRecords);
        RevSalesTrxn.GraphRequest graph = new RevSalesTrxn.GraphRequest('test',
listOfRecords);

        //Place Sales Transaction API call
        RevSalesTrxn.PlaceSalesTransactionResponse resp =
RevSalesTrxn.PlaceSalesTransactionExecutor.execute(graph, pricingPrefEnum,
configurationExecutionEnum, new RevSalesTrxn.ConfigurationOptionsInput(), null,
null, taxPrefEnum, persistPrefEnum);
        System.debug(resp);
    }

    public static void callPSTAPI_Delete() {

        //Apex test to delete a quote line item
        RevSalesTrxn.PricingPreferenceEnum pricingPrefEnum =
RevSalesTrxn.PricingPreferenceEnum.SYSTEM;
        RevSalesTrxn.ConfigurationExecutionEnum configurationExecutionEnum =
RevSalesTrxn.ConfigurationExecutionEnum.SYSTEM;
        RevSalesTrxn.TaxPreferenceEnum taxPrefEnum = RevSalesTrxn.TaxPreferenceEnum.SKIP;

        RevSalesTrxn.PersistPreferenceEnum persistPrefEnum =
RevSalesTrxn.PersistPreferenceEnum.SKIP;

        //Quote setup
        RevSalesTrxn.RecordResource quoteRecord = new
RevSalesTrxn.RecordResource(Quote.getSubjectType(), 'PATCH', '0Q0xx0000004CysCAM');
        RevSalesTrxn.RecordWithReferenceRequest quoteItemRecords = new
RevSalesTrxn.RecordWithReferenceRequest('refQuote', quoteRecord);

        //Quote line item setup
        //Delete a quote line item
        RevSalesTrxn.RecordResource quoteLineItemRecord = new
RevSalesTrxn.RecordResource(QuoteLineItem.getSubjectType(), 'DELETE', '0QLxx0000004CysCAM');

        RevSalesTrxn.RecordWithReferenceRequest quoteLineItemRecords = new
RevSalesTrxn.RecordWithReferenceRequest('refQuoteItem', quoteLineItemRecord);

```

```
List<RevSalesTrxn.RecordWithReferenceRequest> listOfRecords = new
List<RevSalesTrxn.RecordWithReferenceRequest>();
listOfRecords.add(quoteItemRecords);
listOfRecords.add(quoteLineItemRecords);
RevSalesTrxn.GraphRequest graph = new
RevSalesTrxn.GraphRequest('test',listOfRecords);

//Place Sales Transaction API call
RevSalesTrxn.PlaceSalesTransactionResponse resp =
RevSalesTrxn.PlaceSalesTransactionExecutor.execute(graph, pricingPrefEnum,
configurationExecutionEnum, new RevSalesTrxn.ConfigurationOptionsInput(),
null,null,taxPrefEnum, persistPrefEnum);
System.debug(resp);
}
}
```

PlaceSalesTransactionResponse Class

Contains properties to hold the response to the place sales transaction request.

Namespace

[RevSalesTrxn](#)

Example

```
RevSalesTrxn.PlaceSalesTransactionResponse resp =
RevSalesTrxn.PlaceSalesTransactionExecutor.execute(graph, pricingPrefEnum,
configurationExecutionEnum, new RevSalesTrxn.ConfigurationOptionsInput(), null);
```

[PlaceSalesTransactionResponse Properties](#)

Learn more about the available properties with the PlaceSalesTransactionResponse class.

PlaceSalesTransactionResponse Properties

Learn more about the available properties with the PlaceSalesTransactionResponse class.

The PlaceSalesTransactionResponse class includes these properties.

[contextDetails](#)

Get the details of the context that's created for the sales transaction.

[errorResponse](#)

Get the list of errors encountered during the synchronous processing of the API request.

[isSuccess](#)

Get the request status of the synchronous part of the processing.

[salesTransactionId](#)

Get the ID of the sales transaction, such as a quote or an order.

statusUrl

Get the asynchronous status URL of the request, if available.

trackerId

Get the unique identifier assigned to a specific operation or request that's used for tracking and referencing the operation.

contextDetails

Get the details of the context that's created for the sales transaction.

Signature

```
public ConnectApi.ContextDetails contextDetails {get; set;}
```

Property Value

Type: ConnectApi.ContextDetails

errorResponse

Get the list of errors encountered during the synchronous processing of the API request.

Signature

```
public List<ConnectApi.PlaceSalesTransactionErrorResponse> errorResponse {get; set;}
```

Property Value

Type: List<ConnectApi.PlaceSalesTransactionErrorResponse>

isSuccess

Get the request status of the synchronous part of the processing.

Signature

```
public Boolean isSuccess {get; set;}
```

Property Value

Type: Boolean

Indicates whether the synchronous part of the processing is successful (`true`) or not (`false`).

salesTransactionId

Get the ID of the sales transaction, such as a quote or an order.

Signature

```
public String salesTransactionId {get; set;}
```


Property Value

Type: String

statusUrl

Get the asynchronous status URL of the request, if available.

Signature

```
public String statusUrl {get; set;}
```

Property Value

Type: String

trackerId

Get the unique identifier assigned to a specific operation or request that's used for tracking and referencing the operation.

Signature

```
public String trackerId {get; set;}
```

Property Value

Type: String

PricingPreferenceEnum Enum

Specifies the pricing preference during the creation of a sales transaction.

Usage

Used by the [PlaceSalesTransactionExecutor](#) class.

Enum Values

The `RevSalesTrxn.PricingPreferenceEnum` enum includes these values.

Value	Description
Force	Specifies to enforce pricing during the creation of sales transactions.
Skip	Specifies to skip pricing during the creation of sales transactions.
System	Specifies the system to determine whether a pricing calculation is required. The default value is <code>System</code> .

RecordResource Class

Contains constructors and properties to create a record object from the field values of a sales transaction.

Namespace

[RevSalesTrxn](#)

Example

```
RevSalesTrxn.RecordResource quoteRecord = new  
RevSalesTrxn.RecordResource(Quote.getSubjectType(), 'POST');
```

[RecordResource Constructors](#)

Learn more about the available constructors with the RecordResource class.

[RecordResource Properties](#)

Learn more about the available properties with the RecordResource class.

RecordResource Constructors

Learn more about the available constructors with the RecordResource class.

The `RecordResource` class has these constructors.

[RecordResource\(type, method, groupAction, criteria\)](#)

Creates an instance of the RecordResource class to assign values to the fields of a sales transaction by using the sObject type, API method, and sales transaction ID properties. Additionally, you can group order or quote line items based on a criteria by using the groupAction and criteria properties.

[RecordResource\(type, method, id\)](#)

Creates an instance of the RecordResource class to assign values to the fields of a sales transaction by using the sObject type, API method, and sales transaction ID properties.

[RecordResource\(type, method\)](#)

Creates an instance of the RecordResource class to assign the values to the fields of a sales transaction by using the sObject type and API method properties.

RecordResource(type, method, groupAction, criteria)

Creates an instance of the RecordResource class to assign values to the fields of a sales transaction by using the sObject type, API method, and sales transaction ID properties. Additionally, you can group order or quote line items based on a criteria by using the groupAction and criteria properties.

Signature

```
public RecordResource(Schema.SObjectType type, String method, String groupAction,  
Map<String, ANY> criteria)
```

Parameters

type

Type: [Schema.SObjectType](#)

Object that's returned from the field describe result using the `getReferenceTo()` method or from the sObject describe result using the `getSObjectType()` method.

method

Type: String

Method for the API request, such as POST, PATCH, or DELETE.

groupAction

Type: String

Action to group order or quote line items. Valid values are:

- GroupBy
- Group
- Ungroup
- GroupAll
- DeleteGroup

criteria

Type: Map<String,ANY>

Criteria to group order or quote line items. For example, group order or quote line items based on a monthly billing frequency.

RecordResource(type, method, id)

Creates an instance of the RecordResource class to assign values to the fields of a sales transaction by using the sObject type, API method, and sales transaction ID properties.

Signature

```
public RecordResource(Schema.SObjectType type, String method, Id id)
```

Parameters

type

Type: [Schema.SObjectType](#)

Object that's returned from the field describe result using the `getReferenceTo()` method or from the sObject describe result using the `getSObjectType()` method.

method

Type: String

Method for the API request, such as POST, PATCH, or DELETE.

id

Type: Id

ID of the sales transaction, such as a quote or an order.

RecordResource (type, method)

Creates an instance of the RecordResource class to assign the values to the fields of a sales transaction by using the sObject type and API method properties.

Signature

```
public RecordResource (Schema.SObjectType type, String method)
```

Parameters

type

Type: [Schema.SObjectType](#)

Object that's returned from the field describe result using the `getReferenceTo ()` method or from the sObject describe result using the `getSObjectType ()` method.

method

Type: String

Method for the API request, such as POST, PATCH, or DELETE.

RecordResource Properties

Learn more about the available properties with the RecordResource class.

The `RecordResource` class includes these properties.

[criteria](#)

Set the criteria property to group order or quote line items. For example, group order or quote line items based on a monthly billing frequency.

[fieldValues](#)

Set the fieldValues property to assign values to the fields to update the sales transaction.

[groupAction](#)

Set the groupAction property to group order or quote line items.

[id](#)

Set the id property to assign the ID of the sales transaction record.

[method](#)

Set the method property to specify the API request method, such as POST, PATCH, or DELETE.

[type](#)

Set the type property to assign the object type that's returned from the field describe result by using the `getReferenceTo()` method or from the sObject describe result by using the `getSObjectType()` method.

criteria

Set the criteria property to group order or quote line items. For example, group order or quote line items based on a monthly billing frequency.

Signature

```
public Map<String,ANY> criteria {get; set;}
```

Property Value

Type: Map<String,ANY>

fieldValues

Set the fieldValues property to assign values to the fields to update the sales transaction.

Signature

```
public Map<String,ANY> fieldValues {get; set;}
```

Property Value

Type: ListMap<String,ANY>

groupAction

Set the groupAction property to group order or quote line items.

You can group order or quote line items based on location, work types, or departments, if groups are enabled for your org. Groups provide a visualization of the products to view large quotes.

Signature

```
public String groupAction {get; set;}
```

Property Value

Type: String

Valid values are:

- GroupBy
- Group
- Ungroup
- GroupAll
- DeleteGroup

id

Set the id property to assign the ID of the sales transaction record.

Signature

```
public String id {get; set;}
```

Property Value

Type: String

method

Set the method property to specify the API request method, such as POST, PATCH, or DELETE.

Signature

```
public String method {get; set;}
```

Property Value

Type: String

type

Set the type property to assign the object type that's returned from the field describe result by using the `getReferenceTo()` method or from the `sObject` describe result by using the `getSObjectType()` method.

Signature

```
public Schema.SObjectType type {get; set;}
```

Property Value

Type: [Schema.SObjectType](#)

RecordWithReferenceRequest Class

Contains constructors and properties to associate a record object with a reference identifier.

Namespace

[RevSalesTrxn](#)

Example

```
RevSalesTrxn.RecordWithReferenceRequest quoteLineItemRecords = new  
RevSalesTrxn.RecordWithReferenceRequest('refQuoteItem', quoteLineItemRecord);
```

[RecordWithReferenceRequest Constructors](#)

Learn more about the available constructors with the `RecordWithReferenceRequest` class.

[RecordWithReferenceRequest Properties](#)

Learn more about the available properties with the `RecordWithReferenceRequest` class.

RecordWithReferenceRequest Constructors

Learn more about the available constructors with the `RecordWithReferenceRequest` class.

The `RecordWithReferenceRequest` class includes these constructors.

[RecordWithReferenceRequest\(referenceId, record\)](#)

Creates an instance of the `RecordWithReferenceRequest` class to associate a record object with a reference identifier by using the `referenceId` and record object properties.

RecordWithReferenceRequest(referenceId, record)

Creates an instance of the `RecordWithReferenceRequest` class to associate a record object with a reference identifier by using the `referenceId` and record object properties.

Signature

```
public RecordWithReferenceRequest(String referenceId, RevSalesTrxn.RecordResource record)
```

Parameters

referenceId

Type: String

Reference ID that maps to the subrequest response and can be used to reference the response in subsequent subrequests. You can reference the `referenceId` in either the body or URL of a subrequest. Use this syntax to include a reference: `@{referenceId.FieldName}`. See [referenceId property of a composite subrequest](#).

record

Type: [RevSalesTrxn.RecordResource](#)

Record object that's defined using the `RecordResource` class.

RecordWithReferenceRequest Properties

Learn more about the available properties with the `RecordWithReferenceRequest` class.

The `RecordWithReferenceRequest` class has these properties.

[record](#)

Set the record property to specify the record object that's defined by using the `RecordResource` class.

[referenceId](#)

Set the `referenceId` property to specify the reference ID that maps to the subrequest response. This reference ID can be used to reference the response in subsequent subrequests.

record

Set the record property to specify the record object that's defined by using the `RecordResource` class.

Signature

```
public RevSalesTrxn.RecordResource record {get; set;}
```

Property Value

Type: [RevSalesTrxn.RecordResource](#)

referenceId

Set the `referenceId` property to specify the reference ID that maps to the subrequest response. This reference ID can be used to reference the response in subsequent subrequests.

Signature

```
public String referenceId {get; set;}
```

Property Value

Type: String

TaxPreferenceEnum Enum

Specifies whether to execute or skip the tax calculation step for each sales transaction record. Available in API version 65.0 and later.

Enum Values

The `RevSalesTrxn.TaxPreferenceEnum` enum includes this value.

Value	Description
skip	Specifies to skip tax calculation request for each sales transaction record. If this value isn't specified, then tax calculation request is performed by default.

Transaction Management Standard Invocable Actions

Learn more about the standard invocable actions available with Transaction Management.

[Cancel Approval Submission Action](#)

Cancels an approval submission and all child approval work items that haven't been completed. You can also add comments about why the approval admin made the cancellation.

[Create Contract Action](#)

Create a contract from a specific quote record.

[Create or Update Asset From Order Action](#)

Create an asset for each order item in the specified order. New assets are created for a new order. Modify existing assets for change order requests, such as a renewal or a cancellation.

[Create or Update Asset From Order Item Action](#)

Create assets from individual order items within an order. Track assets after the individual line items of an order reach a certain stage in their lifecycle, such as submitted, fulfilled, or provisioned. If the order item is part of a renewal, an amendment, or a cancellation, existing assets are changed.

[Create Order From Quote Action](#)

Create an order from a quote record.

[Create Orders From Quote Action](#)

Create multiple orders from a single quote instead of a single order, ensuring easier order management and fulfillment operations.

[Create Service Document Actions](#)

Create service documents from work orders, work order line items, or service appointments.

[Get Renewable Assets Summary Action](#)

Retrieve details about renewable assets in a given order. You can use this information to create renewal opportunities.

[Initiate Amendment Action](#)

Initiate and execute the amendment of an asset.

[Initiate Cancellation Action](#)

Initiate and execute the cancellation of an asset.

[Initiate Renewal Action](#)

Initiate and execute the renewal of an asset.

[Initiate Rollback on Last Action](#)

Initiate the reversal of the last action on an asset to rectify any transactional errors or to meet changing business requirements.

[Initiate Transfer Action](#)

Transfer an asset or multiple assets from one account to another.

[Override Approval Work Item Action](#)

Update an approval work item status with the approval admin decision and any comments that the approval admin added.

[Reassign Approval Work Item Action](#)

Reassign an approval work item that hasn't been completed. You can also add comments about why the approval admin reassigned the approval work item.

[Recall Approval Submission Action](#)

Recall an approval submission that isn't completed. You can also add comments that the submitter or approval admin made the recall.

[Review Approval Work Item Action](#)

Update an approval work item status with the assignee or reviewer's decision and any comments that the assignee or reviewer added.

SEE ALSO:

[Actions Developer Guide: Overview](#)

[REST API Developer Guide: Invocable Actions Standard](#)

Cancel Approval Submission Action

Cancels an approval submission and all child approval work items that haven't been completed. You can also add comments about why the approval admin made the cancellation.

This action also validates if a user has required permissions to cancel an approval submission. Keep these considerations in mind when you use this invocable action.

- The user must have the Approval Admin user permission.
- The status of the approval submission must be in `In progress` or `Suspended` status.

This action is available in API version 62.0 and later.

Supported REST HTTP Methods

URI

`/services/data/v65.0/actions/standard/cancelApprovalSubmission`

Formats

JSON, XML

HTTP Methods

POST

Authentication

Authorization: Bearer *token*

Inputs

Input	Details
<code>approvalSubmissionId</code>	Type string Description Required. ID of the Approval Submission to be canceled.
<code>comments</code>	Type string Description Comments entered by the approval admin about why they canceled the Approval Submission.

Outputs

None.

Example

POST

Here's a sample request for the Cancel Approval Submission action.

```
{
  "inputs": [
    {
      "approvalSubmissionId": "9iPxx000000011hEBA",
      "comments": "Cancellation comments."
    }
  ]
}
```

```
]
}
```

Here's a sample response for the Cancel Approval Submission action.

```
{
  "actionName": "cancelApprovalSubmission",
  "errors": null,
  "invocationId": null,
  "isSuccess": true,
  "outcome": null,
  "outputValues": null,
  "sortOrder": -1,
  "version": 1
}
```

Create Contract Action

Create a contract from a specific quote record.

This action is available in API version 60.0 and later.

Special Access Rules

The Create Contract action is available in Developer, Enterprise, and Unlimited Editions of Revenue Cloud.

Supported REST HTTP Methods

URI

`/services/data/v65.0/actions/standard/createContract`

Formats

JSON, XML

HTTP Methods

POST

Authentication

Authorization: Bearer *token*

Inputs

Input	Details
contractPriceOption	<p>Type string</p> <p>Description Optional. Determines how the contract price is set for quote line items based on the selected value. Valid values are:</p>

Input**Details**

- `CONTRACT_HEADER_ONLY`—Creates a contract with only the header information, without using net prices or discounts.
- `NET_UNIT_PRICE_ONLY`—Creates a contract specifically for quote line items with a net unit price, saving all net unit prices of the quote as contract prices.
- `DISCOUNT_ONLY`—Creates contract prices specifically for quote line items with discounts, saving all discounts of the quote as contract prices.

The default value is `CONTRACT_HEADER_ONLY`.

`sourceId`

Type

string

Description

Required.

ID of the quote or order that you want to create a contract from.

Outputs**Output****Details**

`contractId`

Type

string

Description

ID of the contract created for the specified order or quote.

Example**POST**

This sample request is for the Create Contract action.

```
{
  "inputs": [
    {
      "sourceId": "0Q0R0000003LyU",
      "contractPriceOption": "NET_UNIT_PRICE_ONLY"
    }
  ]
}
```

This sample response is for the Create Contract action.

```
[
  {
    "actionName": "createContract",
    "errors": null,
    "isSuccess": true,
  }
]
```

```
    "outputValues": {
      "contractId": "800XXX123456789"
    }
  }
]
```

SEE ALSO:

[Salesforce Help: Use a Custom Flow to Create Contracts](#)

Create or Update Asset From Order Action

Create an asset for each order item in the specified order. New assets are created for a new order. Modify existing assets for change order requests, such as a renewal or a cancellation.

This action is available in API version 60.0 and later.

Special Access Rules

You need the Assetize Order permission set to use this invocable action.

Supported REST HTTP Methods

URI

`/services/data/v65.0/actions/standard/createOrUpdateAssetFromOrder`

Formats

JSON, XML

HTTP Methods

POST

Authentication

Authorization: Bearer *token*

Inputs

Input	Details
orderId	Type string
	Description Required. ID of the order.

Outputs

Output	Details
requestId	<p>Type string</p> <p>Description ID of the request to create an asset.</p>

Example

POST

This sample request is for the Create or Update Asset From Order action.

```
{
  "inputs": [
    {
      "orderId": "801DE000000oJfAYAU"
    }
  ]
}
```

This sample response is for the Create or Update Asset From Order action.

```
[
  {
    "actionName": "createOrUpdateAssetFromOrder",
    "errors": null,
    "isSuccess": true,
    "outputValues": {
      "requestId": "3b89392d-6987-40d9-9190-d18fdb5cb849"
    }
  }
]
```

Create or Update Asset From Order Item Action

Create assets from individual order items within an order. Track assets after the individual line items of an order reach a certain stage in their lifecycle, such as submitted, fulfilled, or provisioned. If the order item is part of a renewal, an amendment, or a cancellation, existing assets are changed.

This action is available in API version 60.0 and later.

Special Access Rules

You need the Assetize Order permission set to use this invocable action.

Supported REST HTTP Methods

URI

/services/data/v65.0/actions/standard/createOrUpdateAssetFromOrderItem

Formats

JSON, XML

HTTP Methods

POST

Authentication

Authorization: Bearer *token*

Inputs

Input	Details
orderId	Type string Description Required. ID of the order.

Outputs

Output	Details
requestId	Type string Description ID of the request to create an asset.

Example

POST

This sample request is for the Create or Update Asset From Order Item action.

```
{
  "inputs": [
    {
      "orderItemIds": ["802SG000002HixxYAC"]
    }
  ]
}
```

This sample response is for the Create or Update Asset From Order Item action.

```
{
  "actionName": "createOrUpdateAssetFromOrderItem",
  "errors": null,
  "isSuccess": true,
  "outputValues": {
    "requestId": "b2a2b4b9-845b-4078-980a-759308389604"
  },
  "version": 1
}
```

Create Order From Quote Action

Create an order from a quote record.

This action is available in API version 60.0 and later.

Special Access Rules

The Create Order From Quote action is available in Enterprise, Unlimited, and Developer Editions of Revenue Cloud.

Supported REST HTTP Methods

URI

`/services/data/v65.0/actions/standard/createOrderFromQuote`

Formats

JSON, XML

HTTP Methods

POST

Authentication

Authorization: Bearer *token*

Inputs

Input	Details
quoteRecordId	Type datetime
	Description Required. ID of the quote record.

Outputs

Output	Details
requestId	<p>Type string</p> <p>Description ID of the request.</p>

Example

POST

This sample request is for the Create Order From Quote action.

```
{
  "inputs": [
    {
      "quoteRecordId": "0Q0D20000000DhKAI"
    }
  ]
}
```

This sample response is for the Create Order From Quote action.

```
[
  {
    "actionName": "createOrderFromQuote",
    "errors": null,
    "invocationId": null,
    "isSuccess": true,
    "outcome": null,
    "outputValues": {
      "orderNumber": "00000122",
      "orderId": "801oB000000DCrNQAW"
    },
    "sortOrder": -1,
    "version": 1
  }
]
```

Create Orders From Quote Action

Create multiple orders from a single quote instead of a single order, ensuring easier order management and fulfillment operations.

You can split a quote to create orders in these ways.

- You can create an order by selecting a subset of quote line items.
- You can split a quote into multiple orders based on quote line group.
- You can split a quote into multiple orders based on a quote line item field, such as Product2.

This action is available in API version 65.0 and later.

Special Access Rules

Ensure the **Advanced Order Creation From Quote** toggle from Revenue Settings from Setup is enabled to access this action.

Supported REST HTTP Methods

URI

`/services/data/v65.0/actions/standard/createOrdersFromQuote`

Formats

JSON, XML

HTTP Methods

POST

Authentication

Authorization: Bearer **token**

Inputs

Input	Details
<code>orderCreationMethod</code>	<p>Type</p> <p>string</p> <p>Description</p> <p>If specified, represents the method used to create orders. Valid values are:</p> <ul style="list-style-type: none"> • <code>CreateSingleOrder</code>—Creates a single order from a quote. • <code>CreateOrderByGroup</code>—Create multiple orders based on a quote line group. • <code>CreateOrderByField</code>—Create multiple orders based on a specified quote line item field. <p>If unspecified, the default value is <code>CreateSingleOrder</code>.</p>
<code>orderCreationParameters</code>	<p>Type</p> <p>Apex-defined</p> <p>Description</p> <p>An Apex <code>ConnectApi.OrderCreationParametersInputRepresentation</code> record that contains the additional parameters required by the specified order creation method.</p>
<code>quoteId</code>	<p>Type</p> <p>id</p> <p>Description</p> <p>Required.</p> <p>The ID of the source quote tied to the orders created.</p>

Input	Details
quoteLineItemIds	<p>Type</p> id
	<p>Description</p> List of quote line item IDs to create the orders from. If specified, the orders are created for the list of provided quote line items. If unspecified, orders are created for all quote line items.

Outputs

Output	Details
orderIds	<p>Type</p> id
	<p>Description</p> List of the created order IDs.
requestId	<p>Type</p> string
	<p>Description</p> The request ID used to query the async status.
statusUrl	<p>Type</p> string
	<p>Description</p> The status URL that's used to track the async status.

Examples

Create a partial order from a quote

This example shows a sample request to create a partial order from a quote.

```
{
  "inputs": [
    {
      "quoteId": "0Q0DU0000005tJc0AI",
      "quoteLineItemIds": [
        "0QLDU000000ay2G4AQ",
        "0QLDU000000ay2n4AA"
      ],
      "orderCreationMethod": "CreateSingleOrder"
    }
  ]
}
```

This example shows a sample successful response.

```
{
  "actionName": "createOrdersFromQuote",
  "errors": null,
  "invocationId": null,
  "isSuccess": true,
  "outcome": null,
  "outputValues": {
    "requestId": null,
    "statusUrl": null,
    "orderIds": [
      "801DU000000EYySYAW"
    ]
  },
  "sortOrder": -1,
  "version": 1
}
```

Create orders from a quote based on a quote line group

This example shows a sample request to create orders from a quote based on a quote line group.

```
{
  "inputs": [
    {
      "quoteId": "0Q0DU0000005tJk0AI",
      "orderCreationMethod": "CreateOrderByGroup"
    }
  ]
}
```

This example shows a sample successful response.

```
{
  "actionName": "createOrdersFromQuote",
  "errors": null,
  "invocationId": null,
  "isSuccess": true,
  "outcome": null,
  "outputValues": {
    "requestId": "16PRM0000004DBq",
    "orderIds": [
      "801S70000001VKgIAM"
    ],
    "success": true,
    "errors": [],
    "statusURL": "/services/data/v65.0/subjects/AsyncOperationTracker/16PRM0000004DBq"
  },
  "sortOrder": -1,
  "version": 1
}
```

Create orders from a quote based on a quote line item field

This example shows a sample request to create orders from a quote based on a quote line item field

```
{
  "inputs": [
    {
      "quoteId": "0Q0DU0000005tJW0AY",
      "orderCreationMethod": "CreateOrderByField",
      "orderCreationParameters": {
        "splitFieldName": "Product2Id"
      }
    }
  ]
}
```

This example shows a sample successful response.

```
{
  "actionName": "createOrdersFromQuote",
  "errors": null,
  "invocationId": null,
  "isSuccess": true,
  "outcome": null,
  "outputValues": {
    "requestId": "16PRM0000004DBq",
    "orderIds": [
      "801S70000001VKgIAM",
      "801S70000001WKgIBN"
    ],
    "success": true,
    "errors": [],
    "statusURL": "/services/data/v65.0/subjects/AsyncOperationTracker/16PRM0000004DBq"
  },
  "sortOrder": -1,
  "version": 1
}
```

Create Service Document Actions

Create service documents from work orders, work order line items, or service appointments.

This object is available in API version 60.0 and later.

Supported REST HTTP Methods

URI

/services/data/v60.0/actions/standard/createServiceDocument

Formats

JSON

HTTP Methods

POST

Authentication

Authorization: Bearer *token*

Inputs

Input	Details
<code>recordId</code>	<p>Type string</p> <p>Description Required. The record ID of a work order, work order line item, or service appointment used to generate the service document. Create a Lightning web component to use a Custom Property Editor (CPE) to validate the <code>recordId</code> to avoid deployment issues.</p>
<code>templateId</code>	<p>Type string</p> <p>Description Required, if the <code>recordId</code> is a work order, work order line item, or service appointment. The ID of the service document template to use when generating the document.</p>
<code>locale</code>	<p>Type string</p> <p>Description Optional. Specifies the language for service document localization. The default is the user's language. Used when generating a document in a different language from the user's language. See a list of supported languages in Supported Languages.</p> <p>You can only input language for locale. For example, use <code>es</code> for Spanish. Using language and country, for example <code>es_ES</code> for Spanish associated with Spain, results in error.</p>
<code>title</code>	<p>Type string</p> <p>Description Optional. The value used to name the document that's generated and saved.</p>
<code>documentType</code>	<p>Type string</p> <p>Description Optional. Value that allows users to generate different types of documents by using the service. Valid values are:</p> <ul style="list-style-type: none">• <code>ServiceDocument</code>—Type of service document, such as service agreement or service contract.• <code>QuoteDocument</code>—Type of quote document, such as sales quote or service quote.

Input**Details**

- `SfsQuoteDocument`—Type of quote document for Salesforce Field Service (SFS), suitable for mobile use. This document is stored in the `QuoteDocument` object, and is generated through flow-based processes that link to related service documents.

The default value is `ServiceDocument`.

`pdfReportId`

Type

string

Description

Optional value corresponding to `recordId` and `templateId`. However, the value is required if you aren't generating the document from the default `pdfRecord` record. For the Document Builder feature, this is a service report ID for a report that is in progress, queued, or failed. It must be used to generate a service document from failed state.

Outputs

Inputs**Details**

`pdfReportId`

Type

string

Description

Required. The report's record ID that holds the generated PDF. For service documents, the `pdfReportId` is a service report, and the record is created if the work order, work order line item, or service appointment is passed as the `recordId`.

Usage

Sample Input

The following code sample generates a PDF of a service document with a specific `recordId` and `templateId`:

```
{
  "inputs": [
    {
      "recordId": "08pOG00000023anYAA",
      "templateId": "0M0OG0000005Na40AE",
      "locale": "en_US",
      "title": "My Awesome PDF"
    }
  ]
}
```

```

    ]
}

```

Get Renewable Assets Summary Action

Retrieve details about renewable assets in a given order. You can use this information to create renewal opportunities.

This action gets pricing data from the OrderEntitiesMapping context mapping within the SalesTransactionContext context definition. Before you use this action, edit the context mapping to map the objects and fields used in your pricing procedure to the nodes and attributes in the context definition.



Note: We recommend adding the same fields and mappings for the Quote and Order objects, and for the Quote Line Item and Order Product objects.

This action is available in API version 64.0 and later.

Supported REST HTTP Methods

URI

`/services/data/v65.0/actions/standard/getRenewableAssetsSummary`

Formats

JSON, XML

HTTP Methods

POST

Authentication

Authorization: Bearer *token*

Inputs

Input	Details
orderId	<p>Type</p> <p>id</p> <p>Description</p> <p>Required.</p> <p>ID of the order related to the assets to check for renewal opportunities.</p>

Outputs

Output	Details
renewableAssetsSummary	<p>Type</p> <p>Apex-defined</p>

Output**Details****Description**

Summary of the assets associated with the order, including details about renewal opportunities such as renewal pricing information.

Example**POST**

Here's a sample request for the Get Renewable Assets Summary action.

```
{
  "inputs": [
    {
      "orderId": "801xx000003GZ39AAG"
    }
  ]
}
```

Here's a sample response for the Get Renewable Assets Summary action.

```
[
  {
    "actionName": "getRenewableAssetsSummary",
    "errors": null,
    "invocationId": null,
    "isSuccess": true,
    "outcome": null,
    "outputValues": {
      "renewableAssetsSummary": [
        {
          "startDate": "2025-07-22",
          "rootAssetOpportunity": null,
          "renewalPriceDetails": [
            {
              "quantity": 1,
              "netUnitPrice": 0
            }
          ],
          "productId": "01txx0000006i3DAAQ",
          "priceBookId": "01sxx0000005ptpAAA",
          "priceBookEntryId": "01luxx0000008yXCAAY",
          "orderItem": "802xx000001nb1LAAQ",
          "opportunityProductId": null,
          "lastAssetActionSubtype": null,
          "lastAssetAction": "Initial Sale",
          "endDate": "2025-08-21",
          "assetId": "02ixx0000004HKwAAM",
          "account": "001xx000003GZ1XAAW"
        }
      ]
    }
  }
],
```

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

Initiate Amendment Action

Initiate and execute the amendment of an asset.

Specify IDs of the assets that you want to add to amend by specifying a start date and any changes to quantity. You can also specify the type of amendment record that you want to create such as a quote or an order.

This action is available in API version 60.0 and later.

Supported REST HTTP Methods

URI

`/services/data/v65.0/actions/standard/initiateAmendment`

Formats

JSON, XML

HTTP Methods

POST

Authentication

Authorization: Bearer *token*

Inputs

Input	Details
amendAssetIds	<p>Type string</p> <p>Description Required. The IDs of the assets that you want to amend.</p>
amendContractId	<p>Type string</p> <p>Description The ID of the contract record to be synced with the amendment.</p>
amendStartDate	<p>Type datetime</p> <p>Description Required. Effective start date of the amendment.</p>

Input	Details
amendOpportunityId	Type string Description The ID of the Opportunity record to be synced with the amendment quote.
amendOutputType	Type string Description Required. Type of amendment record to create such as a quote or an order.
quantityChange	Type double Description Required. Quantity to add to or reduce from the asset's existing quantity.
skipPricing	Type boolean Description Indicates whether the pricing procedure must be skipped (<code>true</code>) or performed (<code>false</code>). Available in API version 64.0 and later.

Outputs

Output	Details
amendRecordId	Type string Description The ID of the amendment record that's created.
requestIdentifier	Type string Description Request ID that's used to track the async request.

Example

POST

This sample request is for the Initiate Amendment action.

```
{
  "inputs": [
    {
      "amendAssetIds": ["02iI8000000HPzXIAW"],
      "amendStartDate": "2023-10-21T00:00:00.000Z",
      "quantityChange": 5,
      "amendOutputType": "Quote",
      "amendContractId": "800DU00000001Z1YAI",
      "amendOpportunityId": "006DU0000025AanYAE",
      "skipPricing": false
    }
  ]
}
```

This sample response is for the Initiate Amendment action.

```
[
  {
    "actionName": "initiateAmendment",
    "errors": null,
    "isSuccess": true,
    "outputValues": {
      "record_id": "0Q0xx0000004NsSCAU",
      "requestIdentifier": "16Pxx0000004NIy"
    },
    "version": 1
  }
]
```

Initiate Cancellation Action

Initiate and execute the cancellation of an asset.

Specify the IDs of the assets that you want to add to cancel by specifying a start date. You can also specify the type of cancellation record that you want to create, such as a quote or an order.

This action is available in API version 60.0 and later.

Supported REST HTTP Methods

URI

/services/data/v**65.0**/actions/standard/initiateCancellation

Formats

JSON, XML

HTTP Methods

POST

Authentication

Authorization: Bearer *token*

Inputs

Input	Details
cancelAssetIds	<p>Type string</p> <p>Description Required. The IDs of the assets that you want to cancel. All assets in a request must belong to the same price book.</p>
cancelContractId	<p>Type string</p> <p>Description The ID of the contract record to sync with the cancellation.</p>
cancelOpportunityId	<p>Type string</p> <p>Description The ID of the Opportunity record to sync with the cancellation quote.</p>
cancelOutputType	<p>Type string</p> <p>Description Required. Type of cancellation record to create such as a quote or an order.</p>
cancelStartDate	<p>Type datetime</p> <p>Description Required. Effective date of the cancellation.</p>
skipPricing	<p>Type boolean</p> <p>Description Indicates whether the pricing procedure must be skipped (<i>true</i>) or performed (<i>false</i>). Available in API version 64.0 and later.</p>

Outputs

Output	Details
cancelRecordId	<p>Type string</p> <p>Description The ID of the cancellation record that's created.</p>
requestIdentifier	<p>Type string</p> <p>Description Request ID that's used to track the async request.</p>

Example

POST

This sample request is for the Initiate Cancellation action.

```
{
  "inputs": [
    {
      "cancelAssetIds": [
        "02iI8000000Lc5fIAC"
      ],
      "cancelStartDate": "2023-11-09T00:00:00",
      "cancelOutputType": "Quote",
      "cancelContractId": "800DU00000001Z1YAI",
      "cancelOpportunityId": "006DU0000025AanYAE",
      "skipPricing": false
    }
  ]
}
```

This sample response is for the Initiate Cancellation action.

```
[
  {
    "actionName": "initiateCancellation",
    "errors": null,
    "isSuccess": true,
    "outputValues": {
      "record_id": "0Q0xx0000004P32CAE",
      "requestIdentifier": "16Pxx0000004OTY"
    },
    "version": 1
  }
]
```

Initiate Renewal Action

Initiate and execute the renewal of an asset.

Specify IDs of the assets that you want to add to renew by specifying a start date. You can also specify the type of renewal record that you want to create such as a quote or an order.

This action is available in API version 60.0 and later.

Supported REST HTTP Methods

URI

`/services/data/v65.0/actions/standard/initiateRenewal`

Formats

JSON, XML

HTTP Methods

POST

Authentication

Authorization: Bearer *token*

Inputs

Input	Details
<code>renewAssetIds</code>	<p>Type string</p> <p>Description Required. The IDs of the assets that you want to renew.</p>
<code>renewContractId</code>	<p>Type string</p> <p>Description The ID of the contract record to be synced with the renewal.</p>
<code>renewEndDate</code>	<p>Type datetime</p> <p>Description Effective end date of the renewal. Available in API version 62.0 and later.</p>
<code>renewOpportunityId</code>	<p>Type string</p> <p>Description The ID of the Opportunity record to be synced with the renewal quote.</p>

Input	Details
<code>renewOutputType</code>	<p>Type string</p> <p>Description Required. Type of renewal record to create such as a quote or an order.</p>
<code>renewStartDate</code>	<p>Type datetime</p> <p>Description Optional Effective start date of the renewal. Required for early asset renewals and renewing expired assets, using today's date or a future date. Available in API version 62.0 and later.</p>
<code>skipPricing</code>	<p>Type boolean</p> <p>Description Indicates whether the pricing procedure must be skipped (<code>true</code>) or performed (<code>false</code>). Available in API version 64.0 and later.</p>

Outputs

Output	Details
<code>renewRecordId</code>	<p>Type string</p> <p>Description The ID of the amendment record that's created.</p>
<code>requestIdentifier</code>	<p>Type string</p> <p>Description Request ID that's used to track the async request.</p>

Example

POST

This sample request is for the Initiate Renewal action.

```
{  
  "inputs": [  
    {  
      "renewOutputType": "Quote",  
      "renewStartDate": "2023-01-01T00:00:00",  
      "skipPricing": true  
    }  
  ]  
}
```



```

    {
      "renewAssetIds": ["02ixx0000004LMwAAM"],
      "renewOutputType": "Quote",
      "renewContractId": "800DU0000001z1YAI",
      "renewOpportunityId": "006DU0000025AanYAE",
      "renewStartDate": "2023-10-21T00:00:00.000Z",
      "renewEndDate": "2024-10-21T00:00:00.000Z",
      "skipPricing": false
    }
  ]
}

```

This sample response is for the Initiate Renewal action.

```

[
  {
    "actionName": "initiateRenewal",
    "errors": null,
    "isSuccess": true,
    "outputValues": {
      "record_id": "0Q0xx0000004P32CAE",
      "requestIdentifier": "16Pxx0000004OTY"
    },
    "version": 1
  }
]

```

Initiate Rollback on Last Action

Initiate the reversal of the last action on an asset to rectify any transactional errors or to meet changing business requirements.

Use this action to revert the last amendment or renewal on a particular asset, restoring the asset to its previous state. This action creates a quote or an order based on the specified output type. Use the created reversal quote to verify the reversal and convert the quote into an order.

Keep these considerations in mind when you use this action.

- You can roll back only future dated transactions.
- Rollback action isn't supported for legacy assets.
- The rollback operation is supported for amendment and renewal only.

This action is available in API version 65.0 and later.

Supported REST HTTP Methods

URI

/services/data/v**65.0**/actions/standard/initiateRollBackLastAction

Formats

JSON, XML

HTTP Methods

POST

AuthenticationAuthorization: Bearer *token***Inputs**

Input	Details
assetIds	Type string Description Required. List of asset IDs to include in the last action rollback.
outputType	Type string Description Required. The type of record to create for reversal. Valid values are: <ul style="list-style-type: none">• <code>Quote</code>—Creates a reversal quote.• <code>Order</code>—Creates a reversal order.

Outputs

Output	Details
recordId	Type id Description The ID of the created quote or order.

Example**POST**

This example shows a sample request that initiates the rollback action on an asset and converts it into a quote.

```
{
  "inputs": [
    {
      "assetIds": [
        "02iDU0000006UisYAE"
      ],
      "outputType": "Quote"
    }
  ]
}
```

```
    }  
  ]  
}
```

This example shows a sample successful response.

```
{  
  "actionName": "initiateRollBackLastAction",  
  "errors": null,  
  "isSuccess": true,  
  "outputValues": {  
    "recordId": "0Q0xx0000004NsSCAU"  
  },  
  "version": 1  
}
```

Initiate Transfer Action

Transfer an asset or multiple assets from one account to another.

Keep these considerations in mind when you use this invocable action.

- This action generates 2 quotes or 2 orders.
- One transaction is considered the source, which is used to calculate the reduction amount of the transfer. The other transaction is the target, which is used to calculate the new amount on the target account.
- The quantity on the source is negative, which reduces the existing asset's quantity. The quantity on the target is positive, which creates a new asset on the target account.
- You can change the quantity on the source or the target, but the quantities must be equal and opposite. For example, the source quote line can have a quantity value as -5 , and the target quote line can have a quantity value 5 . If you change the source value to -10 , you must update the target value to 10 . You must update quotes or orders manually.
- The transfer is complete after the orders are assetized.

This action is available in API version 65.0 and later.

Supported REST HTTP Methods

URI

```
/services/data/v65.0/actions/standard/initiateTransfer
```

Formats

JSON, XML

HTTP Methods

POST

Authentication

Authorization: Bearer **token**

Inputs

Input	Details
<code>outputRecordType</code>	<p>Type string</p> <p>Description Required. Specifies either a quote or order record type that's being transferred.</p>
<code>shouldSkipPricing</code>	<p>Type boolean</p> <p>Description Indicates whether to skip pricing at the time of asset transfer (<code>true</code>) or not (<code>false</code>).</p>
<code>targetAccountId</code>	<p>Type string</p> <p>Description Required. The ID of the target account where the asset is transferred.</p>
<code>targetContractId</code>	<p>Type string</p> <p>Description The ID of the target contract that's associated with the asset that's being transferred.</p>
<code>transferDate</code>	<p>Type datetime</p> <p>Description Required. The date of the asset transfer.</p>
<code>transferRecords</code>	<p>Type Apex-defined</p> <p>Description Required. A collection of Apex <code>connectapi__TransferRecordInputRepresentation</code> records that contain details about the assets to be transferred. See ConnectApi.TransferRecordInputRepresentation.</p>

Outputs

Output	Details
assetTransferSourceId	<p>Type</p> <p>id</p> <p>Description</p> <p>The ID of the quote or order that's related to the source account used to start the transfer.</p>
assetTransferTargetId	<p>Type</p> <p>id</p> <p>Description</p> <p>The ID of the quote or order that's related to the target account used to start the transfer.</p>
requestIdentifier	<p>Type</p> <p>id</p> <p>Description</p> <p>The request ID can be used to track the async request.</p>

Example

POST

Here's a sample input to call this invocable action.

```
{
  "inputs": [
    {
      "transferRecords": [
        {
          "assetId": "02ixx0000004HZbAAM",
          "transferQuantity": 1
        }
      ],
      "transferDate": "2025-10-21T00:00:00.000Z",
      "targetAccountId": "001xx000003GbeXAAS",
      "targetContractId": "800DU00000001Z1YAI",
      "outputRecordType": "Quote"
    }
  ]
}
```

Here's a sample input to call this invocable action from Apex code.

```
ConnectApi.TransferRecordInputRepresentation transferRecord = new
ConnectApi.TransferRecordInputRepresentation();
transferRecord.assetId = '02ixx0000004HHjAAM';
transferRecord.transferQuantity = 1;
List<ConnectApi.TransferRecordInputRepresentation> transferRecords = new
```

```
List<ConnectApi.TransferRecordInputRepresentation>();
transferRecords.add(transferRecord);

Invocable.Action action = Invocable.Action.createStandardAction('initiateTransfer');
action.setInvocationParameter('transferRecords', transferRecords);
action.setInvocationParameter('targetAccountId', '001xx000003GYiHAAW');
action.setInvocationParameter('transferDate', '2025-03-01T00:00:00.000Z');
action.setInvocationParameter('outputRecordType', 'Quote');
List<Invocable.Action.Result> results = action.invoke();
System.assertEquals(true, results[0].isSuccess());
Assert.IsNotNull(results[0].getOutputParameters().get('assetTransferSourceId'));
```

Here's a sample response when you call this action.

```
[
  {
    "actionName": "initiateTransfer",
    "errors": null,
    "invocationId": null,
    "isSuccess": true,
    "outcome": null,
    "outputValues": {
      "assetTransferSourceId": "0Q0DU0000006SYF0A2",
      "assetTransferTargetId": "0Q0DU0000006SYE0A2"
    },
    "sortOrder": -1,
    "version": 1
  }
]
```

Override Approval Work Item Action

Update an approval work item status with the approval admin decision and any comments that the approval admin added.

This action also validates if a user has required permissions to override an approval work item and update its status. Keep these considerations in mind when you use this invocable action.

- The user must have the Approval Admin user permission.
- This action enables approval admins to interject the approval decision for any assignee.
- The status of the approval work item must be in `Assigned` status.

This action is available in API version 62.0 and later.

Supported REST HTTP Methods

URI

`/services/data/v65.0/actions/standard/overrideApprovalWorkItem`

Formats

JSON, XML

HTTP Methods

POST

Authentication

Authorization: Bearer *token*

Inputs

Input	Details
approvalDecision	<p>Type</p> <p>string</p> <p>Description</p> <p>Required.</p> <p>Action that the overriding approval admin made for the unreviewed approval work item. Valid values are:</p> <ul style="list-style-type: none">• approve• reject
approvalWorkItemId	<p>Type</p> <p>string</p> <p>Description</p> <p>Required.</p> <p>ID of the unreviewed approval work item to be reviewed by an approval admin.</p>
channelType	<p>Type</p> <p>picklist</p> <p>Description</p> <p>Type of channel where the request to review the approval work item originated. Valid values are:</p> <ul style="list-style-type: none">• <code>InvocableAction</code>• <code>Slack</code>• <code>ApprovalRecord</code> <p>The default value is <code>InvocableAction</code>. Available in API version 65.0 and later.</p>
comments	<p>Type</p> <p>string</p> <p>Description</p> <p>Comments entered by the approval admin about their decision to approve or reject an unreviewed approval work item.</p>

Outputs

None.

Example

POST

Here's a sample request for the Override Approval Work Item action.

```
{
  "inputs": [
    {
      "approvalWorkItemId": "9jRxx00000001lhEAA",
      "approvalDecision": "Reject",
      "channelType": "InvocableAction",
      "comments": "Needs to be reviewed."
    }
  ]
}
```

Here's a sample response for the Override Approval Work Item action.

```
{
  "actionName": "overrideApprovalWorkItem",
  "errors": null,
  "invocationId": null,
  "isSuccess": true,
  "outcome": null,
  "outputValues": null,
  "sortOrder": -1,
  "version": 1
}
```

Reassign Approval Work Item Action

Reassign an approval work item that hasn't been completed. You can also add comments about why the approval admin reassigned the approval work item.

This action also validates if a user has required permissions to reassign an approval work item and update the assignee. Keep these considerations in mind when you use this invocable action.

- The user must have the Approval Admin user permission.
- The status of the approval work item must be in `Assigned` status.

This action is available in API version 62.0 and later.

Supported REST HTTP Methods

URI

`/services/data/v65.0/actions/standard/reassignApprovalWorkItem`

Formats

JSON, XML

HTTP Methods

POST

AuthenticationAuthorization: Bearer *token***Inputs**

Input	Details
approvalWorkItemId	Type string Description Required. ID of the approval work item to be reassigned.
assigneeId	Type string Description Required. ID of the user, group, or queue to reassign the approval work item to.
comments	Type string Description Comments entered by the approval admin about why they reassigned the approval work item.

Outputs

None.

Example**POST**

Here's a sample request for the Reassign Approval Work Item action.

```
{
  "inputs": [
    {
      "approvalWorkItemId": "9jRDU00000015C22AI",
      "assigneeId": "005DU000000I3zHYAS",
      "comments": "Needs to be reviewed."
    }
  ]
}
```

```
]
}
```

Here's a sample response for the Reassign Approval Work Item action.

```
{
  "actionName": "reassignApprovalWorkItem",
  "errors": null,
  "invocationId": null,
  "isSuccess": true,
  "outcome": null,
  "outputValues": null,
  "sortOrder": -1,
  "version": 1
}
```

Recall Approval Submission Action

Recall an approval submission that isn't completed. You can also add comments that the submitter or approval admin made the recall.

This action also validates if a user has required permissions to recall an approval submission. Keep these considerations in mind when you use this invocable action.

- The user must have the Approval Admin user permission.
- The user must also be a submitter of this approval submission.
- The status of the approval submission must be in `In progress` or `Suspended` status.

This action is available in API version 62.0 and later.

Supported REST HTTP Methods

URI

```
/services/data/v65.0/actions/standard/recallApprovalSubmission
```

Formats

JSON, XML

HTTP Methods

POST

Authentication

Authorization: Bearer *token*

Inputs

Input	Details
approvalSubmissionId	<p>Type</p> <p>string</p> <p>Description</p> <p>Required.</p>

Input	Details
	ID of the approval submission to be recalled.
comments	<p>Type</p> <p>string</p> <p>Description</p> <p>Comments entered by the approval admin or approval submitter about why they recalled the approval submission.</p>

Outputs

None.

Example

POST

Here's a sample request for the Recall Approval Submission action.

```
{
  "inputs": [
    {
      "approvalSubmissionId": "9iPxx00000001lhEBA",
      "comments": "Recall comments."
    }
  ]
}
```

Here's a sample response for the Recall Approval Submission action.

```
{
  "actionName": "recallApprovalSubmission",
  "errors": null,
  "invocationId": null,
  "isSuccess": true,
  "outcome": null,
  "outputValues": null,
  "sortOrder": -1,
  "version": 1
}
```

Review Approval Work Item Action

Update an approval work item status with the assignee or reviewer's decision and any comments that the assignee or reviewer added.

Keep these considerations in mind when you use this invocable action.

- The user must be an assignee of the approval work item or be a member of a group or queue if the approval work item is assigned to the group or queue. Additionally, a user has access to Approval Submissions if they're a delegate of the assignee or has a role higher than the assignee.

- The status of the approval work item must be in `Assigned` status.
- The user can also use this action if inherited access to group or queue membership, nested group membership, roles hierarchy, or delegates is available. See [Public Group Considerations](#).

This action is available in API version 62.0 and later.

Supported REST HTTP Methods

URI

`/services/data/v65.0/actions/standard/reviewApprovalWorkItem`

Formats

JSON, XML

HTTP Methods

POST

Authentication

Authorization: Bearer *token*

Inputs

Input	Details
<code>approvalDecision</code>	<p>Type</p> <p>string</p> <p>Description</p> <p>Required.</p> <p>Action that the assigned approver made for the approval work item. Valid values are:</p> <ul style="list-style-type: none"> • <code>approve</code> • <code>reject</code>
<code>approvalWorkItemId</code>	<p>Type</p> <p>string</p> <p>Description</p> <p>Required.</p> <p>ID of the approval work item to be reviewed by the assigned approver.</p>
<code>channelType</code>	<p>Type</p> <p>picklist</p> <p>Description</p> <p>Type of channel where the request to review the approval work item originated. Valid values are:</p> <ul style="list-style-type: none"> • <code>InvocableAction</code> • <code>Slack</code>

Input**Details**

- ApprovalRecord

The default value is `InvocableAction`. Available in API version 65.0 and later.

comments

Type

string

Description

Approval comments for the decision.

Outputs

None.

Example

POST

Here's a sample request for the Review Approval Work Item action.

```
{
  "inputs": [
    {
      "approvalWorkItemId": "9jRxx000000011hEAA",
      "approvalDecision": "Approve",
      "channelType": "InvocableAction",
      "comments": "Looks good."
    }
  ]
}
```

Here's a sample response for the Review Approval Work Item action.

```
{
  "actionName": "reviewApprovalWorkItem",
  "errors": null,
  "invocationId": null,
  "isSuccess": true,
  "outcome": null,
  "outputValues": null,
  "sortOrder": -1,
  "version": 1
}
```

Transaction Management Metadata API Types

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

[Flow for Transaction Management](#)

The flow for Transaction Management represents the metadata associated with a flow. With Flow, you can create an application that takes users through a series of pages to query and update the records in the database. You can also run logic and provide branching capability based on user input to build dynamic applications.

SEE ALSO:

[Metadata API Developer Guide: Understanding Metadata API](#)

Flow for Transaction Management

The flow for Transaction Management represents the metadata associated with a flow. With Flow, you can create an application that takes users through a series of pages to query and update the records in the database. You can also run logic and provide branching capability based on user input to build dynamic applications.

FlowActionCall

Transaction Management exposes additional `actionType` values for the `FlowActionCall` metadata type.

Field Name	Field Type	Description
<code>actionType</code>	<code>InvocableActionType</code> (enumeration of type string)	<p>Required.</p> <p>The action type. Additional valid values for Transaction Management are:</p> <ul style="list-style-type: none"> • <code>createContract</code>—Create a contract from a specific quote record. • <code>createOrderFromQuote</code>—Create an order from a quote record. • <code>createServiceDocument</code>—Create service documents from work orders, work order line items, or service appointments. • <code>cancelApprovalSubmission</code>—Cancels an approval submission and all child approval work items that haven't been completed. You can also add comments about why the approval admin made the cancellation. Added in API version 62.0 and later. • <code>overrideApprovalWorkItem</code>—Update an approval work item status with the approval admin decision and any comments that the approval admin added. Added in API version 62.0 and later. • <code>reassignApprovalWorkItem</code>—Reassign an approval work item that hasn't been completed. You can also add comments about why the approval admin reassigned the approval work item. Added in API version 62.0 and later. • <code>recallApprovalSubmission</code>—Recall an approval submission that isn't completed. You can also add comments that the submitter or approval admin made the recall. Added in API version 62.0 and later. • <code>reviewApprovalWorkItem</code>—Update an approval work item status with the assignee or reviewer's decision and any comments

Field Name	Field Type	Description
		<p>that the assignee or reviewer added. Added in API version 62.0 and later.</p> <ul style="list-style-type: none"> • <code>getRenewableAssetsSummary</code>—Retrieve details about renewable assets in a given order. You can use this information to create renewal opportunities. Added in API version 64.0 and later. • <code>createOrUpdateAssetFromOrder</code>—Create an asset for each order item in the specified order. New assets are created for a new order. Modify existing assets for change order requests, such as a renewal or a cancellation. • <code>createOrUpdateAssetFromOrderItem</code>—Create assets from individual order items within an order. Track assets after the individual line items of an order reach a certain stage in their lifecycle, such as submitted, fulfilled, or provisioned. If the order item is part of a renewal, an amendment, or a cancellation, existing assets are changed. • <code>initiateAmendment</code>—Initiate and execute the amendment of an asset. • <code>initiateRenewal</code>—Initiate and execute the renewal of an asset. • <code>initiateCancellation</code>—Initiate and execute the cancellation of an asset. • <code>initiateRollbackLastAction</code>—Initiate the reversal of the last action on an asset to rectify any transactional errors or to meet changing business requirements. • <code>createOrdersFromQuote</code>—Create multiple orders from a single quote instead of a single order, ensuring easier order management and fulfillment operations. • <code>initiateTransfer</code>—Transfer an asset or multiple assets from one account to another.

/

CHAPTER 8 Dynamic Revenue Orchestrator

In this chapter ...

- [Dynamic Revenue Orchestrator Standard Objects](#)
- [Dynamic Revenue Orchestrator Standard Invocable Actions](#)
- [Dynamic Revenue Orchestrator Metadata API Types](#)
- [Dynamic Revenue Orchestrator Tooling API Objects](#)
- [Callouts in Dynamic Revenue Orchestrator](#)

Get visibility into a product's fulfillment journey. Also, get a complete view of the entire fulfillment design that includes processes such as order decomposition, fulfillment plans, and jeopardy management.

EDITIONS

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

Dynamic Revenue Orchestrator Standard Objects

The Dynamic Revenue Orchestrator data model provides objects and fields to manage details of a product's fulfillment.

[AssetFulfillmentDecomp](#)

Represents the relationship between an ordered asset and its corresponding fulfillment asset. This object is available in API version 62.0 and later.

[FulfillmentAsset](#)

Represents an instance of a technical product used to provide a customer asset. This object is available in API version 61.0 and later.

[FulfillmentAssetAttribute](#)

Represents an attribute of a fulfillment asset. This object is available in API version 61.0 and later.

[FulfillmentAssetRelationship](#)

Represents a relationship between two fulfillment assets. This object is available in API version 61.0 and later.

[FulfillmentFalloutRule](#)

Represents the fulfillment fallout handling rule. This object is available in API version 61.0 and later.

[FulfillmentLineAttribute](#)

Represents an attribute of a fulfillment order line. This object is available in API version 61.0 and later.

[FulfillmentLineRel](#)

Represents a relationship between two fulfillment order lines. This object is available in API version 61.0 and later.

[FulfillmentLineSourceRel](#)

Represents the relationship between a fulfillment order line and its decomposition source. This object is available in API version 61.0 and later.

[FulfillmentPlan](#)

Represents a set of steps to be created to fulfill the order. This object is available in API version 61.0 and later.

[FulfillmentStep](#)

Represents a task that's required to perform a certain action as part of order fulfillment. This task can be manual or automated. This object is available in API version 61.0 and later.

[FulfillmentStepDefinition](#)

Represents a definition of a step that must be executed during fulfillment orchestration. This object is available in API version 61.0 and later.

[FulfillmentStepDefinitionGroup](#)

Represents a set of fulfillment step definitions. This object is available in API version 61.0 and later.

[FulfillmentStepDependency](#)

Represents a dependency between tasks by defining the order between a task and one that depends on it. This object is available in API version 61.0 and later.

[FulfillmentStepDependencyDef](#)

Represents a dependency that must be created between two fulfillment step records. This object is available in API version 62.0 and later.

[FulfillmentStepJeopardyRule](#)

Represents the duration and tolerance for the step in the fulfillment process to allow the overall tracking of rules and risks. This object is available in API version 61.0 and later.

[FulfillmentStepSource](#)

Represents a link between a fulfillment step and the corresponding order lines. This object is available in API version 61.0 and later.

[FulfillmentTaskAssignmentRule](#)

Represents a set of actions that assign a task to a user or queue. This object is available in API version 63.0 and later.

[FulfillmentWorkspace](#)

Represents a visual designer for fulfillment plans that can have multiple step groups and their dependencies. This object is available in API version 61.0 and later.

[FulfillmentWorkspaceltem](#)

Represents information about the attributes that are used in the definition for a fulfillment step group. This object is available in API version 61.0 and later.

[ProductDecompEnrichmentRule](#)

Represents mappings between fields and attributes. Enrichment rules are part of a decomposition rule, and are used to propagate data to fulfillment order lines. This object is available in API version 61.0 and later.

[ProdtDecompEnrchVarMap](#)

Represents the mapping of a field context tag or an attribute to a variable within an expression set. This object is available in API version 64.0 and later.

[ProductFulfillmentDecompRule](#)

Represents a rule that determines how an order is broken into sub-orders with specific technical details that help in order fulfillment. It can be applied to a commercial or a technical product. This object is available in API version 61.0 and later.

[ProductFulfillmentScenario](#)

Represents a link between a product and the corresponding group of fulfillment steps that's necessary to fulfill that product. This object is available in API version 61.0 and later.

[SalesTrxnDeleteEvent](#)

Represents the platform event that triggers the deletion of sales transaction fulfillment request records when the corresponding reference records are deleted. This object is available in API version 64.0 and later.

[SalesTransactionFulfillReq](#)

Represents the statuses of all the sub-orders that belong to the selected commercial or technical product. This object is available in API version 62.0 and later.

[ValTfrm](#)

Represents mappings between fields and attributes. Enrichment rules are part of a decomposition rule, and are used to propagate data to fulfillment order lines. This object is available in API version 61.0 and later.

[ValTfrmGrp](#)

Represents a rule that determines how an order is broken into sub-orders with specific technical details that help in order fulfillment. The rule can be applied to a commercial or a technical product. This object is available in API version 61.0 and later.

SEE ALSO:

[Object Reference for the Salesforce Platform: Overview of Salesforce Objects and Fields](#)

[SOAP API Developer Guide: Introduction to SOAP API](#)

AssetFulfillmentDecomp

Represents the relationship between an ordered asset and its corresponding fulfillment asset. This object is available in API version 62.0 and later.

Supported Calls

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

Fields

Field	Details
FulfillmentSourceAssetId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The identifier of the relationship between an asset and a fulfillment asset. This field is a polymorphic relationship field.</p> <p>Relationship Name FulfillmentSourceAsset</p> <p>Refers To Asset, FulfillmentAsset</p>
FulfillmentTargetAssetId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The identifier of the target asset that's being fulfilled. This field is a relationship field.</p> <p>Relationship Name FulfillmentTargetAsset</p> <p>Refers To FulfillmentAsset</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the asset that's being fulfilled.</p>
OwnerId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who created the request record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
RelationshipType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The type of relationship between an asset and a fulfillment asset. Valid values are:</p> <ul style="list-style-type: none"> • SourceBundleRoot • SourceLineItem
SegmentIdentifier	<p>Type string</p> <p>Properties Create, Group, Nillable, Sort,</p> <p>Description The ID of the ramp segment associated with the asset state period. This field is available in API version 63.0 and later in orgs that have Revenue Cloud when the Ramp Deals setting is enabled.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The status of the fulfillment asset. Valid values are:</p> <ul style="list-style-type: none"> • Active • 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.

AssetFulfillmentDecompHistory on page 2178

History is available for tracked fields of the object starting API version 65.0.

AssetFulfillmentDecompShare on page 2182

Sharing is available for the object.

FulfillmentAsset

Represents an instance of a technical product used to provide a customer 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()`

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The identifier of the account. This field is a relationship field.</p> <p>Relationship Name Account</p> <p>Relationship Type Lookup</p> <p>Refers To Account</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>For internal use only.</p>
LastViewedDate	<p>Type dateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>For internal use only.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the fulfillment asset.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description For internal use only. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
ProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The identifier of the corresponding product. This field is a relationship field.</p> <p>Relationship Name Product</p> <p>Relationship Type Lookup</p> <p>Refers To Product2</p>
Quantity	<p>Type double</p>

Field	Details
	<p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description For internal use only.</p>
ScopeIdentifierText	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort</p> <p>Description The scope in which this fulfillment asset record is created. This field is available in API version 65.0 and later.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The status of the fulfillment asset. Valid values are:</p> <ul style="list-style-type: none"> • Active • InActive
UnitOfMeasureId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort</p> <p>Description The unit of measure for the asset quantity such as, unit, gallon, ton, or case. This field is available in API version 63.0 and later. This field is a relationship field.</p> <p>Relationship Name UnitOfMeasure</p> <p>Refers To UnitOfMeasure</p>

Associated Objects

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

FulfillmentAssetHistory on page 2178

History is available for tracked fields of the object starting API version 65.0.

FulfillmentAssetShare on page 2182

Sharing is available for the object.

FulfillmentAssetAttribute

Represents an attribute of a fulfillment asset. 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()`, `query()`, `update()`, `upsert()`

Fields

Field	Details
<code>AttributeDefinitionId</code>	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The attribute definition in the catalog. This field is a relationship field.</p> <p>Relationship Name AttributeDefinition</p> <p>Relationship Type Lookup</p> <p>Refers To AttributeDefinition</p>
<code>AttributeName</code>	<p>Type string</p> <p>Properties Filter, Group, idLookup, Nillable, Sort</p> <p>Description The name of the attribute.</p>
<code>AttributePicklistValueId</code>	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description For internal use only. This field is a relationship field.</p> <p>Relationship Name AttributePicklistValue</p> <p>Relationship Type Lookup</p> <p>Refers To AttributePicklistValue</p>
AttributeValue	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The value of the attribute.</p>
ExternalId	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description For internal use only.</p>
FulfillmentAssetId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The identifier of the fulfillment asset. This field is a relationship field.</p> <p>Relationship Name FulfillmentAsset</p> <p>Relationship Type Master-detail</p> <p>Refers To FulfillmentAsset (the master object)</p>

FulfillmentAssetRelationship

Represents a relationship between two fulfillment assets. 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()`, `undelete()`, `update()`, `upsert()`

Fields

Field	Details
AssociatedFulfillAssetRole	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The role of the associated fulfillment asset.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • <code>BundleComponent</code> • <code>ClassificationComponent</code>—Product Classification Component
AssociatedFulfillmentAssetId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The name of the associated fulfillment asset. This field is a relationship field.</p> <p>Relationship Name AssociatedFulfillmentAsset</p> <p>Refers To FulfillmentAsset</p>
MainFulfillmentAssetId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The name of the primary fulfillment asset.</p>

Field	Details
	<p>This field is a relationship field.</p> <p>Relationship Name MainFulfillmentAsset</p> <p>Relationship Type Master-detail</p> <p>Refers To FulfillmentAsset (the master object)</p>
MainFulfillmentAssetRole	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The role of the primary fulfillment asset. Valid value is <code>Bundle Parent</code>.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the fulfillment asset relationship.</p>
ProductRelationshipTypeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The type of relationship between two assets. This field is a relationship field.</p> <p>Relationship Name ProductRelationshipType</p> <p>Refers To ProductRelationshipType</p>

FulfillmentFalloutRule

Represents the fulfillment fallout handling rule. 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
ErrorCode	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The failure error code of the fulfillment step that's associated with the rule.</p>
FalloutQueueId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The fallout queue that's associated with the fallout task. This field is available in API version 62.0 and later. This field is a relationship field.</p> <p>Relationship Name FalloutQueue</p> <p>Refers To Group</p>
FlowDefinitionName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the flow definition that's associated with the <code>AutoTask</code> type of fulfillment step.</p>
IntegrationDefinitionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The integration definition that's associated with the <code>Callout</code> type of fulfillment step. This field is a relationship field.</p>

Field	Details
	<p>Relationship Name IntegrationDefinition</p> <p>Relationship Type Lookup</p> <p>Refers To IntegrationProviderDef</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date when a user referenced this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date when a user viewed this record.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the flow definition that's associated with the <code>AutoTask</code> type of fulfillment step.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who created the fulfillment record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p>

Field	Details
	<p>Refers To Group, User</p>
RetriesAllowed	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The maximum number of times a retry policy is run before the fulfillment step is considered failed.</p>
RetryIntervals	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The interval after which the selected retry policy is run when the fulfillment step fails. This field is available in API version 62.0 and later.</p>
RetryPolicy	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the retry policy used when the fulfillment step fails. Valid value is:</p> <ul style="list-style-type: none"> • Immediate • Monotonous • Staggered
StepType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the type of fulfillment step associated with the fallout rule. Valid values are:</p> <ul style="list-style-type: none"> • AutoTask • Callout • ManualTask

Field	Details
	<ul style="list-style-type: none"> • Milestone • Pause

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.

FulfillmentFalloutRuleHistory on page 2178

History is available for tracked fields of the object.

FulfillmentFalloutRuleShare on page 2182

Sharing is available for the object.

FulfillmentLineAttribute

Represents an attribute of a fulfillment order line. 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()`, `query()`, `update()`, `upsert()`

Fields

Field	Details
<code>AttributeDefinitionId</code>	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description A unique identifier for the attribute definition in the catalog. This field is a relationship field.</p> <p>Relationship Name AttributeDefinition</p> <p>Refers To AttributeDefinition</p>
<code>AttributeName</code>	<p>Type string</p>

Field	Details
	<p>Properties Filter, Group, idLookup, Nillable, Sort</p> <p>Description The name of the attribute.</p>
AttributePicklistValueId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description For internal use only. This field is a relationship field.</p> <p>Relationship Name AttributePicklistValue</p> <p>Refers To AttributePicklistValue</p>
AttributeValue	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The value of the attribute.</p>
ExternalId	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID that uniquely identifies the relationship in an external data source.</p>
FulfillmentOrderLineItemId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description A unique identifier for the fulfillment order line item. This field is a relationship field.</p> <p>Relationship Name FulfillmentOrderLineItem</p>

Field	Details
	<p>Relationship Type Master-detail</p> <p>Refers To FulfillmentOrderLineItem (the master object)</p>

FulfillmentLineRel

Represents a relationship between two fulfillment order lines. 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()`, `undelete()`, `update()`, `upsert()`

Fields

Field	Details
AssociatedFoItemInventory	<p>Type picklist</p> <p>Properties Filter, Group, Restricted picklist, Sort</p> <p>Description Inventory level for the associated fulfillment order item. Valid values are:</p> <ul style="list-style-type: none"> Included in Main Inventory Not Included in Main Inventory <p>This field is available in API version 63.0 and later.</p>
AssociatedFulfillOrderItemId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The identifier of the associated fulfillment order line item. This field is a relationship field.</p> <p>Relationship Name AssociatedFulfillOrderItem</p>

Field	Details
	<p>Refers To FulfillmentOrderLineItem</p>
AssociatedLineRole	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The role of the associated fulfillment order line item. Valid values are:</p> <ul style="list-style-type: none"> • BundleComponent • ClassificationComponent—Product Classification Component
AssociatedQuanScaleMethod	<p>Type picklist</p> <p>Properties Filter, Group, Restricted picklist, Sort</p> <p>Description Method used to scale the quantity of the associated order item summary relative to the main fulfillment order item. Valid values are:</p> <ul style="list-style-type: none"> • Constant • Proportional <p>The default value is Proportional. This field is available in API version 63.0 and later.</p>
FulfillmentOrderId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The ID of the parent fulfillment order. This field is a relationship field.</p> <p>Relationship Name FulfillmentOrder</p> <p>Refers To FulfillmentOrder</p>
MainFulfillOrderItemRole	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The role of the primary fulfillment order line item. Valid value is <code>Bundle</code>.</p>
MainFulfillmentOrderItemId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The ID of the associated fulfillment order line item. This field is a relationship field.</p> <p>Relationship Name MainFulfillmentOrderItem</p> <p>Relationship Type Master-detail</p> <p>Refers To FulfillmentOrderLineItem (the master object)</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the fulfillment order line relationship.</p>
ProductRelationshipTypeId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The type of relationship between two assets. This field is a relationship field.</p> <p>Relationship Name ProductRelationshipType</p> <p>Refers To ProductRelationshipType</p>

FulfillmentLineSourceRel

Represents the relationship between a fulfillment order line and its decomposition source. 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
FulfilmentOrderLineId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The ID of the fulfillment order line. This field is a relationship field.</p> <p>Relationship Name FulfilmentOrderLine</p> <p>Refers To FulfillmentOrderLineItem</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The relation between the two order line sources.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who created the relationship record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>

Field	Details
SourceItemIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The ID of the decomposition source that's related to the fulfillment order line. This field is available in API version 64.0 and later.</p>
SourceLineItemId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The ID of the source line item. This field is a polymorphic relationship field.</p> <p>Relationship Name SourceLineItem</p> <p>Refers To FulfillmentOrderLineItem, OrderItem</p>
SourceType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The type of source for the line item. Valid values are:</p> <ul style="list-style-type: none"> • SourceBundleRoot • SourceLineItem
SupplementalAction	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description The supplemental action that's applied to the line item based on the run-time changes made to the original fulfillment request. This field is available in API version 62.0 and later. Valid values are:</p> <ul style="list-style-type: none"> • Add • Amend

Field	Details
	<ul style="list-style-type: none"> Cancel NoChange
UniqueIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort</p> <p>Description For internal use only.</p>

Associated Objects

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

[FulfillmentLineSourceRelShare](#) on page 2182

Sharing is available for the object.

FulfillmentPlan

Represents a set of steps to be created to fulfill the order. 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
ExecutionUserId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description For internal use only.</p> <p>Relationship Name ExecutionUser</p> <p>Refers To User</p>

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date when a user referenced this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date when a user viewed this record.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the fulfillment plan.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who created the record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
Priority	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description The priority of the fulfillment plan execution. This field is available in API version 63.0 and later. Valid values are:</p>

Field	Details
	<ul style="list-style-type: none"> • Default • High • Bulk
SourceIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update, idLookup (Available in API version 64.0 and later)</p> <p>Description For internal use only.</p>
SourceType	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort</p> <p>Description The type of source for the fulfillment plan. This field is available in API version 62.0 and later.</p>
State	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The status of the fulfillment plan. Valid values are:</p> <ul style="list-style-type: none"> • Completed • InProgress • NotStarted
UsageType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The business that uses Fulfillment Orchestration. Valid values are:</p> <ul style="list-style-type: none"> • IntegrationOrchestrator • OrderFulfillment • StageManagement

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.

FulfillmentPlanChangeEvent on page 2169

Change events are available for the object.

FulfillmentPlanHistory on page 2178

History is available for tracked fields of the object starting API version 65.0.

FulfillmentPlanShare on page 2182

Sharing is available for the object.

FulfillmentStep

Represents a task that's required to perform a certain action as part of order fulfillment. This task can be manual or automated. 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
<code>ActualCompletionDate</code>	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the fulfillment step state changed to <code>Completed</code> or <code>Skipped</code>.</p>
<code>ActualStartDate</code>	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the fulfillment step state changed to <code>Ready</code>.</p>
<code>AssignedToId</code>	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The user or queue associated with the fulfillment step.</p>

Field	Details
	<p>This field is a polymorphic relationship field.</p> <p>Relationship Name AssignedTo</p> <p>Relationship Type Lookup</p> <p>Refers To Queue, User</p>
CompensatedStepId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort</p> <p>Description The alternative step that's executed when a particular step in the fulfillment plan is amended or canceled. This field is a relationship field. This field is available in API version 62.0 and later.</p> <p>Relationship Name CompensatedStep</p> <p>Refers To FulfillmentStep</p>
DelayOf	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The value of the delay. This field is available in API version 63.0 and later.</p>
DelayUnit	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The unit for the delay of the fulfillment step. This field is available in API version 63.0 and later. Valid values are:</p> <ul style="list-style-type: none"> • Days • Hours • Minutes

Field	Details
ExecuteOn	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies when to execute the fulfillment step. This field is available in API version 63.0 and later.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • PreviousStepExecutionDate • SourceLineStartDate
ExecuteOnRuleId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the expression set. The fulfillment step is executed only when its corresponding expression set returns the value <code>true</code>.</p> <p>This field is a polymorphic relationship field.</p> <p>Relationship Name ExecuteOnRule</p> <p>Relationship Type Lookup</p> <p>Refers To ExpressionSet</p>
ExecutionMessage	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description For internal use only.</p>
FalloutQueueId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The fallout queue that's associated with the fallout task. This field is available in API version 62.0 and later.</p> <p>This field is a relationship field.</p>

Field	Details
	<p>Relationship Name FalloutQueue</p> <p>Refers To Group</p>
FlowDefinitionName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the flow definition that's associated with the <code>AutoTask</code> type of fulfillment step. This field is available in API version 62.0 and later.</p>
FlowInterviewId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The flow interview associated with the fulfillment step. This field is a relationship field.</p> <p>Relationship Name FlowInterview</p> <p>Relationship Type Lookup</p> <p>Refers To FlowInterview</p>
ForcePlanFreezeDuringExecution	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies whether to freeze the plan while the step is in progress. If enabled, specifies how to complete the step before resuming the plan. This field is available in API version 63.0 and later. Valid values are:</p> <ul style="list-style-type: none"> • <code>Never</code> • <code>YesButWaitForStepCompletion</code> <p>The default value is <code>Never</code>.</p>

Field	Details
FulfillmentPlanId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The fulfillment plan associated with the fulfillment step. This field is a relationship field.</p> <p>Relationship Name FulfillmentPlan</p> <p>Relationship Type Lookup</p> <p>Refers To FulfillmentPlan</p>
FulfillmentStepDefinitionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The fulfillment step definition associated with the fulfillment step. This field is a relationship field.</p> <p>Relationship Name FulfillmentStepDefinition</p> <p>Relationship Type Lookup</p> <p>Refers To FulfillmentStepDefinition</p>
IntegrationDefinitionNameId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description For internal use only. This field is a relationship field.</p> <p>Relationship Name IntegrationDefinitionName</p> <p>Relationship Type Lookup</p>

Field	Details
	<p>Refers To IntegrationProviderDef</p>
IsSkipBranch	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the remaining steps in the fulfillment step group are skipped from execution when the Execute On Rule condition is set (<code>true</code>) or not (<code>false</code>). This field is available in API version 62.0 and later. The default value is <code>false</code>.</p>
JeopardyStatus	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The jeopardy status of the fulfillment step. This field is a calculated field.</p>
JeopardyThreshold	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The number of days, hours, minutes, or seconds, counting back from the expected duration, before a fulfillment step is in jeopardy.</p>
JeopardyThresholdUnit	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The time unit of the jeopardy threshold. Valid values are:</p> <ul style="list-style-type: none"> • Days • Hours • Minutes • Seconds <p>The default value is <code>Minutes</code>.</p>

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date when a user referenced this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date when a user viewed this record.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the fulfillment step.</p>
NextEarliestRunTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The next available time for the process execution. This field is available in API version 62.0 and later.</p>
OmniscriptName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description For inyternal use only.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description The ID of the user who created the record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
PlannedCompletionDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time Dynamic Revenue Orchestrator estimates that the fulfillment step will complete.</p>
PlannedStartDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the Dynamic Revenue Orchestrator calculates the fulfillment step state change to Ready.</p>
PointOfNoReturn	<p>Type multipicklist</p> <p>Properties Create, Filter, Nillable</p> <p>Description The type of source change applied to the line item. This field is available in API version 62.0 and later. Valid value is:</p> <ul style="list-style-type: none"> Changes Denied
RequestedCompletionDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p>

Field	Details
	<p>Description The planned completion date and time of the fulfillment step.</p>
RequestedStartDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The planned start date and time of the fulfillment step.</p>
ResumeOnRuleId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The rule set or expression set for the fulfillment step. The step is completed only when the corresponding expression set returns the <code>isExecuteStep</code> output as <code>true</code>. This field is a polymorphic relationship field.</p> <p>Relationship Name ResumeOnRule</p> <p>Relationship Type Lookup</p> <p>Refers To ExpressionSet</p>
RetryAttempts	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The number of attempts allowed for retry as set up in the Fallout Qualification Rule table.</p>
RunAsUserId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Overrides user context for an automated step. The default user context is AutomatedProc user. This field is a relationship field.</p>

Field	Details
	<p>Relationship Name RunAsUser</p> <p>Relationship Type Lookup</p> <p>Refers To User</p>
State	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The state of the fulfillment step. For example, In Progress or Completed. Valid values are:</p> <ul style="list-style-type: none"> • Completed • Failed • FatallyFailed • InProgress • Pending • Ready • Scheduled • Skipped
StepType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The fulfillment step type associated with the fulfillment step. Valid values are:</p> <ul style="list-style-type: none"> • AutoTask • Callout • ManualTask • Milestone • Pause • StagedAssetize—Available in API version 63.0 and later.
TaskAllocationType	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The method of assigning the manual step. This field is available in API version 63.0 and later.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • ContextBased • LeastLoaded • RoundRobin
TaskId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the task assigned to a user or queue. This field is available in API version 63.0 and later.</p> <p>This field is a relationship field.</p> <p>Relationship Name Task</p> <p>Refers To Task</p>
UsageType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The details about the business that uses Fulfillment Orchestration. Some examples of UsageBy include Financial Services Cloud and CPQ.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • Fulfillment • InsuranceRuleAction • IntegrationOrchestrator • OrderFulfillment • StageManagement

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.

FulfillmentStepChangeEvent on page 2169

Change events are available for the object.

FulfillmentStepHistory on page 2178

History is available for tracked fields of the object.

FulfillmentStepShare on page 2182

Sharing is available for the object.

FulfillmentStepDefinition

Represents a definition of a step that must be executed during fulfillment orchestration. 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()`, `undelete()`, `update()`, `upsert()`

Fields

Field	Details
AmendGroupId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The fulfillment step group that's added to the fulfillment plan when the step is amended. This field is available in API version 62.0 and later. This field is a relationship field.</p> <p>Relationship Name AmendGroup</p> <p>Refers To FulfillmentStepDefinitionGroup</p>
AssignedToId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The user or queue associated with the fulfillment step definition. This field is a polymorphic relationship field.</p>

Field	Details
	<p>Relationship Name AssignedTo</p> <p>Relationship Type Lookup</p> <p>Refers To Queue, User</p>
CancelledGroupId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The fulfillment step group that's added to the fulfillment plan when the step is canceled. This field is available in API version 62.0 and later. This field is a relationship field.</p> <p>Relationship Name CancelledGroup</p> <p>Refers To FulfillmentStepDefinitionGroup</p>
CustomBaseExecutionDate	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The context tag containing a custom date that's used to calculate the execution time for a future-dated step. This field is available in API version 65.0 and later.</p>
CustomFulfillmentScope	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The custom scope to use during order fulfillment. This field is available in API version 65.0 and later.</p>
DelayOf	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description</p> <p>The value of the delay. This field is available in API version 63.0 and later.</p>
DelayUnit	<p>Type</p> <p>picklist</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description</p> <p>The unit for the delay of the fulfillment step. This field is available in API version 63.0 and later.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • Days • Hours • Minutes
ExecuteOn	<p>Type</p> <p>picklist</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description</p> <p>Specifies when to execute the fulfillment step. This field is available in API version 63.0 and later.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • PreviousStepsStartDate • SourceLineStartDate
ExecuteOnRuleId	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p>Description</p> <p>The expression set for the fulfillment step. The step is executed only when the corresponding expression set is <code>true</code>.</p> <p>This field is a polymorphic relationship field.</p> <p>Relationship Name</p> <p>ExecuteOnRule</p> <p>Relationship Type</p> <p>Lookup</p> <p>Refers To</p> <p>ExpressionSet</p>

Field	Details
FlowDefinitionName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the associated flow.</p>
ForcePlanFreezeDuringExecution	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies whether to freeze the plan while the step is in progress. If enabled, specifies how to complete the step before resuming the plan. This field is available in API version 63.0 and later.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • Never • YesButForcefullyCompleteStep <p>The default value is <code>Never</code>.</p>
IntegrationDefinitionNameId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the integration definition that's used to set up communication with an external endpoint.</p> <p>This field is a relationship field.</p> <p>Relationship Name IntegrationDefinitionName</p> <p>Relationship Type Lookup</p> <p>Refers To IntegrationProviderDef</p>
IsSkipBranch	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description</p> <p>Indicates whether the remaining steps in the fulfillment step group are skipped from execution when the Execute On Rule condition is set. This field is available in API version 62.0 and later.</p> <p>The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type</p> <p>dateTime</p> <p>Properties</p> <p>Filter, Nillable, Sort</p> <p>Description</p> <p>The most recent date when a user referenced this record.</p>
LastViewedDate	<p>Type</p> <p>dateTime</p> <p>Properties</p> <p>Filter, Nillable, Sort</p> <p>Description</p> <p>The most recent date when a user viewed this record.</p>
Name	<p>Type</p> <p>string</p> <p>Properties</p> <p>Create, Filter, Group, idLookup, Sort, Update</p> <p>Description</p> <p>The name of the fulfillment step definition.</p>
OmniscriptName	<p>Type</p> <p>string</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p>Description</p> <p>For internal use only.</p>
PointOfNoReturn	<p>Type</p> <p>multipicklist</p> <p>Properties</p> <p>Create, Filter, Nillable, Update</p> <p>Description</p> <p>The type of source change applied to the line item. This field is available in API version 62.0 and later.</p> <p>Valid value is:</p>

Field	Details
	<ul style="list-style-type: none"> Changes Denied
ResumeOnRuleId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The expression set for the fulfillment step definition. The step is completed when the expression set is <code>true</code>. This field is a polymorphic relationship field.</p> <p>Relationship Name ResumeOnRule</p> <p>Relationship Type Lookup</p> <p>Refers To ExpressionSet</p>
RunAsUserId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The user context to run a fulfillment step when the fulfillment operator wants to override the default autoproc user. This field is a relationship field.</p> <p>Relationship Name RunAsUser</p> <p>Relationship Type Lookup</p> <p>Refers To User</p>
Scope	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The scope of the fulfillment step definition. For example, <code>Bundle</code> or <code>Order</code>. Valid values are:</p> <ul style="list-style-type: none"> Bundle CrossPlan

Field	Details
	<ul style="list-style-type: none"> • LineItem • Plan <p>The default value is Plan.</p>
StepDefinitionGroupId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description For internal use only. This field is a relationship field.</p> <p>Relationship Name StepDefinitionGroup</p> <p>Relationship Type Master-detail</p> <p>Refers To FulfillmentStepDefinitionGroup (the master object)</p>
StepType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description For internal use only. Valid values are:</p> <ul style="list-style-type: none"> • AutoTask • Callout • ManualTask • Milestone • Pause • StagedAssetize
TaskAllocationType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The method of assigning the manual step. This field is available in API version 62.0 and later. Valid value is:</p> <ul style="list-style-type: none"> • RoundRobin

Field	Details
	<ul style="list-style-type: none"> LeastLoaded ContextBased
UsageType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The business vertical that uses fulfillment orchestration. For example, Financial Services Cloud. Valid values are:</p> <ul style="list-style-type: none"> IntegrationOrchestrator OrderFulfillment StageManagement

FulfillmentStepDefinitionGroup

Represents a set of fulfillment step definitions. 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
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date when a user referenced this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date when a user viewed this record.</p>

Field	Details
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the fulfillment step definition group.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who created the record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
UsageType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The business that uses Fulfillment Orchestration. Possible values are:</p> <ul style="list-style-type: none"> • <code>IntegrationOrchestrator</code> • <code>OrderFulfillment</code> • <code>StageManagement</code> • <code>InsuranceRuleAction</code>

Associated Objects

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

[FulfillmentStepDefinitionGroupShare](#) on page 2182

Sharing is available for the object.

FulfillmentStepDependency

Represents a dependency between tasks by defining the order between a task and one that depends on it. 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()`, `undelete()`, `update()`, `upsert()`

Fields

Field	Details
DependencyDefinitionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the fulfillment step dependency definition. This field is a relationship field.</p> <p>Relationship Name DependencyDefinition</p> <p>Refers To FulfillmentStepDependencyDef</p>
DependentStepId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The name of a fulfillment step that depends on this step. This field is a relationship field.</p> <p>Relationship Name DependentStep</p> <p>Relationship Type Master-detail</p> <p>Refers To FulfillmentStep</p>

Field	Details
DependsOnStepId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the fulfillment step that this step depends on. That is, the name of the step that must be executed before this one can run. This field is a relationship field.</p> <p>Relationship Name DependsOnStep</p> <p>Refers To FulfillmentStep</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description An automatically generated name for the fulfillment step dependency.</p>

FulfillmentStepDependencyDef

Represents a dependency that must be created between two fulfillment step records. This object is available in API version 62.0 and later.



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

Supported Calls

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

Fields

Field	Details
DependencyScope	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p>

Field	Details
	<p>Description</p> <p>The scope of the fulfillment step dependency definition. For example, Order or Order Item.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • Bundle • LineItem • Plan • CrossPlan <p>The default value is Plan.</p>
DependsOnStepDefinitionId	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p>Description</p> <p>The fulfillment step definition that must be executed before this step.</p> <p>This field is a relationship field.</p> <p>Relationship Name</p> <p>DependsOnStepDefinition</p> <p>Refers To</p> <p>FulfillmentStepDefinition</p>
FulfillmentStepDefinitionId	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Create, Filter, Group, Sort</p> <p>Description</p> <p>The identifier of the fulfillment step definition.</p> <p>This field is a relationship field.</p> <p>Relationship Name</p> <p>FulfillmentStepDefinition</p> <p>Relationship Type</p> <p>Master-detail</p> <p>Refers To</p> <p>FulfillmentStepDefinition (the master object)</p>
IsCompensateInReverse	<p>Type</p> <p>boolean</p> <p>Properties</p> <p>Create, Defaulted on create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description</p> <p>Indicates whether the order to insert the compensated group steps is reversed when a fulfillment step is canceled (<code>true</code>) or not (<code>false</code>).</p> <p>The default value is <code>false</code>. This field is available in API version 63.0 and later.</p>
Name	<p>Type</p> <p>string</p> <p>Properties</p> <p>Create, Filter, Group, idLookup, Sort, Update</p> <p>Description</p> <p>The name of the fulfillment step dependency definition.</p>
PropagateStateToDependentStep	<p>Type</p> <p>picklist</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description</p> <p>The state that's propagated to the dependent fulfillment step when the source fulfillment step is amended or canceled in the fulfillment plan.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • Amended • Both • Canceled • None <p>This field is available in API version 63.0 and later.</p>

FulfillmentStepJeopardyRule

Represents the duration and tolerance for the step in the fulfillment process to allow the overall tracking of rules and risks. 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
EstimatedDuration	<p>Type int</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The estimated time to complete the fulfillment step.</p>
EstimatedDurationUnit	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The unit of measurement that applies to the estimated time to complete the fulfillment step. Valid values are:</p> <ul style="list-style-type: none"> • Days • Hours • Minutes • Seconds <p>The default value is <code>Minutes</code>.</p>
FlowDefinition	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The flow definition that's associated with the <code>AutoTask</code> type of the fulfillment step.</p>
IntegrationDefinitionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The integration definition that's associated with the <code>Callout</code> type of the fulfillment step. This field is a relationship field.</p> <p>Relationship Name IntegrationDefinition</p> <p>Relationship Type Lookup</p>

Field	Details
	<p>Refers To IntegrationProviderDef</p>
JeopardyThreshold	<p>Type int</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The value indicating the threshold after which the fulfillment step is in jeopardy.</p>
JeopardyThresholdUnit	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The unit of measurement that applies to the jeopardy threshold value. Valid values are:</p> <ul style="list-style-type: none"> • Days • Hours • Minutes • Seconds <p>The default value is Minutes.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description For internal use only.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description For internal use only.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p>

Field	Details
	<p>Description For internal use only.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description For internal use only. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
StepType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The type of fulfillment step that's affected by the jeopardy rule. Valid values are:</p> <ul style="list-style-type: none"> • AutoTask • Callout • ManualTask • Milestone • Pause

FulfillmentStepSource

Represents a link between a fulfillment step and the corresponding order lines. 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()`, `undelete()`, `update()`, `upsert()`

Fields

Field	Details
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description An automatically generated name for the fulfillment step source.</p>
SourceIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The identifier of the source order line item (order item or fulfillment order line).</p>
SourceLineItemId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description For internal use only. This field is a polymorphic relationship field.</p> <p>Relationship Name SourceLineItem</p> <p>Refers To FulfillmentOrderLineItem, OrderItem</p>
StepId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The identifier of the fulfillment step. This field is a relationship field.</p> <p>Relationship Name Step</p> <p>Relationship Type Master-detail</p> <p>Refers To FulfillmentStep (the master object)</p>

Field	Details
VersionGroupIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the version group that's assigned to the fulfillment step source item. This field is available in API version 64.0 and later.</p>

Associated Objects

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

[FulfillmentStepSourceChangeEvent](#) on page 2169

Change events are available for the object.

FulfillmentTaskAssignmentRule

Represents a set of actions that assign a task to a user or queue. 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
ConditionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Condition ID that's used to determine the task assignment. This field is a polymorphic relationship field.</p> <p>Relationship Name Condition</p> <p>Refers To ExpressionSet</p>
DestinationId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Destination ID of the task assignment such as, Queue or User. This field is a polymorphic relationship field.</p> <p>Relationship Name Destination</p> <p>Refers To Group, User</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date when a user referenced this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date when a user viewed this record.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the object that specifies the condition used to determine the task assignment.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who created the task assignment rule record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p>

Field	Details
	<p>Refers To Group, User</p>
Priority	<p>Type int</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The priority of the rule for execution.</p>
SourceId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Source ID of the task assignment such as, Queue or Fulfillment Step Definition. This field is a relationship field.</p> <p>Relationship Name Source</p> <p>Refers To Group</p>
TaskAllocationType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The method of assigning the manual step. Valid values are:</p> <ul style="list-style-type: none"> • ContextBased • LeastLoaded • RoundRobin

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.

[FulfillmentTaskAssignmentRuleFeed](#)

Feed tracking is available for the object.

FulfillmentTaskAssignmentRuleHistory

History is available for tracked fields of the object.

FulfillmentTaskAssignmentRuleShare

Sharing is available for the object.

FulfillmentWorkspace

Represents a visual designer for fulfillment plans that can have multiple step groups and their dependencies. 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
Description	<p>Type textarea</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The description of the fulfillment workspace.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date when a user referenced this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date when a user viewed this record.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p>

Field	Details
	<p>Description</p> <p>The name of the fulfillment workspace.</p>
OwnerId	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description</p> <p>The ID of the user who owns this record.</p> <p>This field is a polymorphic relationship field.</p> <p>Relationship Name</p> <p>Owner</p> <p>Refers To</p> <p>Group, User</p>

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.

FulfillmentWorkspaceHistory on page 2178


History is available for tracked fields of the object starting API version 65.0.

FulfillmentWorkspaceShare on page 2182

Sharing is available for the object.

FulfillmentWorkspaceItem

Represents information about the attributes that are used in the definition for a fulfillment step group. 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()`, `undelete()`, `update()`, `upsert()`

Fields

Field	Details
FulfillmentStepDefinitionGroupId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description For internal use only. This field is a relationship field.</p> <p>Relationship Name FulfillmentStepDefinitionGroup</p> <p>Relationship Type Master-detail</p> <p>Refers To FulfillmentStepDefinitionGroup (the detail object)</p>
FulfillmentWorkspaceId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The ID of the parent fulfillment workspace that's related to this record. This field is a relationship field.</p> <p>Relationship Name FulfillmentWorkspace</p> <p>Relationship Type Master-detail</p> <p>Refers To FulfillmentWorkspace (the master object)</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the fulfillment workspace item.</p>
ShowOrder	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description</p> <p>The display sequence value of the fulfillment workspace item.</p>

ProductDecompEnrichmentRule

Represents mappings between fields and attributes. Enrichment rules are part of a decomposition rule, and are used to propagate data to fulfillment order lines. 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()`, `undelete()`, `update()`, `upsert()`

Fields

Field	Details
CalculationDefinitionId	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p>Description</p> <p>An expression set or a decision matrix that calculates the destination value.</p> <p>This field is a polymorphic relationship field.</p> <p>Relationship Name</p> <p>CalculationDefinition</p> <p>Refers To</p> <p>DecisionMatrixDefinition, ExpressionSet</p>
CalculationMethod	<p>Type</p> <p>picklist</p> <p>Properties</p> <p>Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description</p> <p>The type of enrichment rule.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> Ad-verbatim—As Is Static-Lookup—List Lookup

Field	Details
	<ul style="list-style-type: none"> Expression-Set—Available in API version 64.0 and later
DecompositionRuleId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The identifier of the decomposition rule. This field is a relationship field.</p> <p>Relationship Name DecompositionRule</p> <p>Relationship Type Parent-child</p> <p>Refers To ProductFulfillmentDecompRule (the master object)</p>
DestinationApiName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The API name of the destination field or attribute code of an attribute.</p>
DestinationAttributeDefinitionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description For internal use only. This field is a relationship field.</p> <p>Relationship Name DestinationAttributeDefinition</p> <p>Refers To AttributeDefinition</p>
DestinationAttributeIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p>

Field	Details
	<p>Description</p> <p>The destination entity attribute that is mapped from the source entity attribute. This field can store a Salesforce AttributeDefinition ID or an external identifier. This field is available in API version 65.0 and later.</p>
DestinationContextTag	<p>Type</p> <p>string</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p>Description</p> <p>The name of the destination context definition.</p>
DestinationType	<p>Type</p> <p>picklist</p> <p>Properties</p> <p>Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description</p> <p>The destination type for mapping.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • Attribute • Field
LastReferencedDate	<p>Type</p> <p>dateTime</p> <p>Properties</p> <p>Filter, Nillable, Sort</p> <p>Description</p> <p>The most recent date when a user referenced this record.</p>
LastViewedDate	<p>Type</p> <p>dateTime</p> <p>Properties</p> <p>Filter, Nillable, Sort</p> <p>Description</p> <p>The most recent date when a user viewed this record</p>
ListMappingGroupId	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description For internal use only. This field is a relationship field.</p> <p>Relationship Name ListMappingGroup</p> <p>Refers To ValTfrmGrp</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the decomposition rule.</p>
RuleEnforcement	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies whether the rule applies to all fulfillment requests or only to specific ones. Valid values are:</p> <ul style="list-style-type: none"> • AllFulfillmentRequests • InitialFulfillmentRequest <p>This field is available in API version 63.0 and later.</p>
SourceApiName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The API name of the source field or attribute code of an attribute.</p>
SourceAttributeDefinitionId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description For internal use only. This field is a relationship field.</p>

Field	Details
	<p>Relationship Name SourceAttributeDefinition</p> <p>Refers To AttributeDefinition</p>
SourceAttributeIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The source entity attribute that is mapped to the destination entity attribute. This field can store a Salesforce AttributeDefinition ID or an external identifier. This field is available in API version 65.0 and later.</p>
SourceContextTag	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The source type for the context definition.</p>
SourceType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The source type for mapping. Valid values are:</p> <ul style="list-style-type: none"> • Attribute • Field

ProdtDecompEnrchVarMap

Represents the mapping of a field context tag or an attribute to a variable within an expression set. This object is available in API version 64.0 and later.

Supported Calls

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

Fields

Field	Details
AttributeDefinitionId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The attribute definition the expression set variable is mapped to when creating the enrichment rule. This field is a relationship field.</p> <p>Relationship Name AttributeDefinition</p> <p>Refers To AttributeDefinition</p>
ExpressionSetVarName	<p>Type string</p> <p>Properties Filter, Group, Sort</p> <p>Description The name of the variable that's mapped to the expression set defined in the enrichment rule.</p>
FieldContextTagName	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The name of the field context tag to which the expression set variable is mapped when creating the enrichment rule.</p>
ProductAttributeIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The product attribute from an internal or external catalog, used by DRO to copy data during the enrichment process. This field is available in API version 65.0 and later.</p>
ProductDecompEnrichmentRuleId	<p>Type reference</p>

Field	Details
	<p>Properties Filter, Group, Sort</p> <p>Description The rule that contains the mappings between the fields and attributes for the decomposing product. This field is a relationship field.</p> <p>Relationship Name ProductDecompEnrichmentRule</p> <p>Relationship Type Master-detail</p> <p>Refers To ProductDecompEnrichmentRule (the master object)</p>
VariableType	<p>Type picklist</p> <p>Properties Defaulted on create, Filter, Group, Restricted picklist, Sort</p> <p>Description Specifies whether the expression set variable is an input or output variable. Valid values are:</p> <ul style="list-style-type: none"> • Input • Output <p>The default value is Input.</p>

ProductFulfillmentDecompRule

Represents a rule that determines how an order is broken into sub-orders with specific technical details that help in order fulfillment. It can be applied to a commercial or a technical product. 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
DestinationProductId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The destination product for the decomposition rule. This field is a relationship field.</p> <p>Relationship Name DestinationProduct</p> <p>Relationship Type Lookup</p> <p>Refers To Product2</p>
DestinationIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The destination entity in the product fulfillment decomposition rule. This field can store a Salesforce product ID or an external identifier. This field is available in API version 65.0 and later.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date when a user referenced this record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date when a user viewed this record.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the decomposition rule.</p>

Field	Details
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who created the record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
Priority	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The priority of the decomposition rule. Decomposition rules are executed in order of priority.</p>
SourceProductClassificationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The classification of the source product that's used for decomposition. This field is available in API version 62.0 and later. This field is a relationship field.</p> <p>Relationship Name SourceProductClassification</p> <p>Refers To ProductClassification</p>
SourceClassIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p>

Field	Details
	<p>Description</p> <p>The source classification entity in the product fulfillment decomposition rule. This field can store a Salesforce product ID or an external identifier. This field is available in API version 65.0 and later.</p>
SourceIdentifier	<p>Type</p> <p>string</p> <p>Properties</p> <p>Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description</p> <p>The source entity in the product fulfillment decomposition rule. This field can store a Salesforce product ID or an external identifier. This field is available in API version 65.0 and later.</p>
SourceProductId	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Create, Filter, Group, Sort, Update</p> <p>Description</p> <p>Source product for the decomposition rule.</p> <p>This field is a relationship field.</p> <p>Relationship Name</p> <p>SourceProduct</p> <p>Relationship Type</p> <p>Lookup</p> <p>Refers To</p> <p>Product2</p>

Associated Objects

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

ProductFulfillmentDecompRuleShare on page 2182

Sharing is available for the object.

ProductFulfillmentScenario

Represents a link between a product and the corresponding group of fulfillment steps that's necessary to fulfill that product. 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
Action	<p>Type multipicklist</p> <p>Properties Create, Filter, Nillable, Update</p> <p>Description For internal use only. Valid values are:</p> <ul style="list-style-type: none"> • Add • Amend • Cancel • NoChange • Renew
FulfillmentStepDefnGroupId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The fulfillment step definition group associated with the product fulfillment scenario. This field is a relationship field.</p> <p>Relationship Name FulfillmentStepDefnGroup</p> <p>Relationship Type Lookup</p> <p>Refers To FulfillmentStepDefinitionGroup</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description For internal use only.</p>

Field	Details
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description For internal use only.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the product fulfillment scenario.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description For internal use only. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Group, User</p>
ProductClassificationId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The product classification associated with the product fulfillment scenario. This field is a relationship field.</p> <p>Relationship Name ProductClassification</p> <p>Relationship Type Lookup</p> <p>Refers To ProductClassification</p>

Field	Details
ProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update, Nillable (Available in API version 64.0 and later)</p> <p>Description The product associated with the product fulfillment scenario. This field is a relationship field.</p> <p>Relationship Name Product</p> <p>Relationship Type Lookup</p> <p>Refers To Product2</p>
SourceClassIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The source classification entity in the product fulfillment scenario. This field can store a Salesforce Product Class ID or an external identifier. This field is available in API version 65.0 and later.</p>
SourceIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The source entity in the product fulfillment scenario. This field can store a Salesforce product ID or an external identifier. This field is available in API version 65.0 and later.</p>

Associated Objects

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

ProductFulfillmentScenarioShare on page 2182

Sharing is available for the object.

SalesTrxnDeleteEvent

Represents the platform event that triggers the deletion of sales transaction fulfillment request records when the corresponding reference records are deleted. This object is available in API version 64.0 and later.

Supported Calls

`create()`, `describeSObjects()`

Fields

Field	Details
ReferenceObjectIdentifier	<p>Type string</p> <p>Properties Create, Nillable</p> <p>Description Object identifier for the sales transaction fulfillment request to be deleted.</p>

SalesTransactionFulfillReq

Represents the statuses of all the sub-orders that belong to the selected commercial or technical product. This object is available in API version 62.0 and later.

Supported Calls

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

Fields

Field	Details
AssetizationStatus	<p>Type picklist</p> <p>Properties Filter, Group, Restricted picklist, Sort</p> <p>Description Specifies the status of the assetization. Valid values are:</p> <ul style="list-style-type: none"> • Completed • Failed • InProgress

Field	Details
	<ul style="list-style-type: none"> • NotStarted • Rejected • NotApplicable- Available in API version 64.0 and later.
DecompositionStatus	<p>Type picklist</p> <p>Properties Filter, Group, Restricted picklist, Sort</p> <p>Description Specifies the status of the decomposition. Valid values are:</p> <ul style="list-style-type: none"> • Completed • Failed • InProgress • NotStarted • Rejected • NotApplicable- Available in API version 64.0 and later.
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the sales transaction fulfillment request.</p>
OrchestrationGroupKey	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The identifier of the group of sales transactions that require synchronization before processing. This field is available in API version 63.0 and later.</p>
OwnerId	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description The ID of the user who created the request record. This field is a polymorphic relationship field.</p>

Field	Details
	<p>Relationship Name Owner</p> <p>Refers To Group, User</p>
PlanCompositionStatus	<p>Type picklist</p> <p>Properties Filter, Group, Restricted picklist, Sort</p> <p>Description For internal use only. Valid values are:</p> <ul style="list-style-type: none"> Completed Failed InProgress NotStarted Rejected NotApplicable - Available in API version 64.0 and later.
PlanExecutionStatus	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Specifies the status of the plan execution. Valid values are:</p> <ul style="list-style-type: none"> InProgress Frozen Freezing
PlanId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The identifier of the plan. This field is a relationship field.</p> <p>Relationship Name Plan</p>

Field	Details
	<p>Refers To FulfillmentPlan</p>
PreviousRequestId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The identifier of the previous fulfillment request. This field is a relationship field.</p> <p>Relationship Name PreviousRequest</p> <p>Refers To SalesTransactionFulfillReq</p>
ReferenceObjectIdentifier	<p>Type reference</p> <p>Properties Filter, Group, idLookup, Nillable, Sort</p> <p>Description The ID of the sales transaction record. This field is available in API version 64.0 and later.</p>
SalesTransactionType	<p>Type picklist</p> <p>Properties Filter, Group, Restricted picklist, Sort</p> <p>Description Specifies the type of sales transaction that's processed by the fulfillment request. Valid values are:</p> <ul style="list-style-type: none"> • StandardOrder • GenericAdapter—Available in API version 64.0 and later.
Status	<p>Type picklist</p> <p>Properties Filter, Group, Restricted picklist, Sort</p> <p>Description Specifies the overall status of the fulfillment. Valid values are:</p> <ul style="list-style-type: none"> • Created

Field	Details
	<ul style="list-style-type: none"> Freezing Frozen Fulfilled Fulfilling Rejected Superseded

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.

[SalesTransactionFulfillReqShare](#) on page 2182

Sharing is available for the object.

ValTfrm

Represents mappings between fields and attributes. Enrichment rules are part of a decomposition rule, and are used to propagate data to fulfillment order lines. 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()`, `undelete()`, `update()`, `upsert()`

Fields

Field	Details
InputDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date of value entry.</p>
InputDatetime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p>

Field	Details
	<p>Description The time of value entry.</p>
InputNumber	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The value of input number.</p>
InputPicklistValueId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The identifier of the input list of values. This field is a relationship field.</p> <p>Relationship Name InputPicklistValue</p> <p>Refers To AttributePicklistValue</p>
InputString	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The value of input text.</p>
IsInputBoolean	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates if a value was entered (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
IsOutputBoolean	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description Indicates if there was an output value (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The name of the related transformation group.</p>
OutputDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The date of matched output.</p>
OutputDatetime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The time of matched output.</p>
OutputNumber	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The value of output number.</p>
OutputPicklistValueId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The identifier of the output list of values. This field is a relationship field.</p> <p>Relationship Name OutputPicklistValue</p>

Field	Details
	Refers To AttributePicklistValue
OutputString	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The value of output text.
ValueTransformGroupId	Type reference Properties Create, Filter, Group, Sort Description The identifier of the related transformation group. This field is a relationship field. Relationship Name ValueTransformGroup Relationship Type Master-detail Refers To ValTfrmGrp (the master object)

ValTfrmGrp

Represents a rule that determines how an order is broken into sub-orders with specific technical details that help in order fulfillment. The rule can be applied to a commercial or a technical product. 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
DestinationPrimitiveType	Type picklist

Field	Details
	<p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The data type of the output value.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • Boolean • Currency • Date • Datetime • Number • Percent—Picklist Value • Picklist • Text
IsDestinationEnumerated	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the output is a list of values (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
IsSourceEnumerated	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the input is from a list of values (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date when a user referenced this record.</p>
LastViewedDate	<p>Type dateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The most recent date when a user viewed this record.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the list mapping.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the user who owns this record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
SourcePrimitiveType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The data type of the input value. Valid values are:</p> <ul style="list-style-type: none"> • Boolean • Currency • Date • Datetime • Number • Percent—Picklist Value • Picklist • Text

Field	Details
UsageType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The data mapping feature that uses this value transformation group. Valid value is <code>DFOListMapping</code>.</p>

Associated Objects

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

[ValTfrmGrpShare](#) on page 2182

Sharing is available for the object.

Dynamic Revenue Orchestrator Standard Invocable Actions

Use standard invocable actions to submit an order or a sales transaction to Dynamic Revenue Orchestrator (DRO) for fulfillment.

[Freeze Sales Transaction Action](#)

Freeze a sales transaction to disable the modification of a line item.

[Get Point Of No Return Action](#)

Get details about the point of no return milestone for each line item in a sales transaction.

[Submit Order Action](#)

Submit an order to Dynamic Revenue Orchestrator (DRO) for fulfillment.

[Submit Sales Transaction Action](#)

Initiate the fulfillment process of any sales transaction, such as a quote, an order, or an order summary.

[Unfreeze Sales Transaction Action](#)

Unfreeze a sales transaction to enable the modification of a line item.

SEE ALSO:

[Actions Developer Guide: Overview](#)

[REST API Developer Guide: Invocable Actions Standard](#)

Freeze Sales Transaction Action

Freeze a sales transaction to disable the modification of a line item.

A line item can reach a milestone in the fulfillment process, which is known as a point of no return, where the line item can't accept modifications. Get details about the point of no return for each line item of a sales transaction.

This action is available in API version 64.0 and later.

Special Access Rules

The Freeze Sales Transaction action is available in Enterprise, Unlimited, and Developer Editions of Revenue Cloud. See the [required permissions](#) to access and call this invocable action.

Supported REST HTTP Methods

URI

`/services/data/v65.0/actions/standard/freezeSalesTransaction`

Formats

JSON, XML

HTTP Methods

POST

Authentication

Authorization: Bearer *token*

Inputs

Input	Details
salesTransactionId	<p>Type</p> <p>id</p> <p>Description</p> <p>Required. ID of the sales transaction that's submitted to the Dynamic Revenue Orchestrator.</p>

Outputs

Output	Details
errorCode	<p>Type</p> <p>string</p> <p>Description</p> <p>Code indicating the type of error.</p>
orchestrationPlanId	<p>Type</p> <p>id</p> <p>Description</p> <p>ID of the created orchestration plan.</p>

Output	Details
planState	<p>Type</p> <p>string</p> <p>Description</p> <p>Status of the created orchestration plan. Valid values are:</p> <ul style="list-style-type: none"> • FAILURE • NOTSTARTED • PENDING • COMPLETED • FROZEN • INPROGRESS
pointOfNoReturn DetailForLineItems List	<p>Type</p> <p>string</p> <p>Description</p> <p>Collection of sales transaction line items, where each item includes a boolean value indicating whether it has reached the point of no return.</p>
requestId	<p>Type</p> <p>string</p> <p>Description</p> <p>ID of the request to get the point of no return details.</p>
salesTransactionId	<p>Type</p> <p>string</p> <p>Description</p> <p>ID of the sales transaction that's submitted to the Dynamic Revenue Orchestrator.</p>

Example

POST

This sample request is for the Freeze Sales Transaction action.

```
{
  "inputs": [
    {
      "salesTransactionId": "801SG00000jQO1ZYAW"
    }
  ]
}
```

This sample response is for the Freeze Sales Transaction action.

```
[
  {
    "actionName": "freezeSalesTransaction",
    "errors": null,
    "invocationId": null,
    "isSuccess": true,
    "outcome": null,
    "outputValues": {
      "salesTransactionId": "801SG00000jQO1ZYAW",
      "orchestrationPlanId": "13VSG00000229Z72AI",
      "requestId": "452789a6-f2ab-4079-8aca-a11dbfef6a45",
      "pointOfNoReturnDetailForLineItemsList": "802SG000007D0B4YAK\": {\namendAllowed:
false,\nanyChangesAllowed: true,\nancelAllowed: false\n}, \n802SG000007D0B3YAK\":
{\namendAllowed: false,\nanyChangesAllowed: true,\nancelAllowed: false\n}",
      "planState": "Frozen"
    },
    "sortOrder": -1,
    "version": 1
  }
]
```

Get Point Of No Return Action

Get details about the point of no return milestone for each line item in a sales transaction.

A line item can reach a milestone in the fulfillment process, which is known as a point of no return, where the line item can't accept modifications. Get details about the point of no return for each line item of a sales transaction.

This action is available in API version 64.0 and later.

Special Access Rules

The Get Point Of No Return action is available in Enterprise, Unlimited, and Developer Editions of Revenue Cloud. See the [required permissions](#) to access and call this invocable action.

Supported REST HTTP Methods

URI

`/services/data/v65.0/actions/standard/getPointOfNoReturn`

Formats

JSON, XML

HTTP Methods

POST

Authentication

Authorization: Bearer *token*

Inputs

Input	Details
salesTransactionId	Type id Description Required. ID of the sales transaction to get the point of no return details for.

Outputs

Output	Details
errorCode	Type string Description Code indicating the type of error.
lineItemsPointOfNoReturnInfo	Type string Description Line items with the point of no return details.
planId	Type id Description ID of the composed fulfillment plan.
planState	Type string Description State of the fulfillment plan.
requestId	Type string Description Request ID of the invocation.
salesTransactionId	Type string

Output**Details****Description**

ID of the submitted sales transaction.

Example

POST

This sample request is for the Get Point Of No Return action.

```
{
  "inputs": [
    {
      "salesTransactionId": "801SG00000jQ01ZYAW"
    }
  ]
}
```

This sample response is for the Get Point Of No Return action.

```
[
  {
    "actionName": "getPointOfNoReturn",
    "errors": null,
    "invocationId": null,
    "isSuccess": true,
    "outcome": null,
    "outputValues": {
      "planId": "13VSG00000229Z72AI",
      "requestId": "35c9388b-d30d-4d68-aae5-c109c8bff7ef",
      "lineItemsPointOfNoReturnInfo": "802SG000007D0B4YAK\": {\namendAllowed:
false,\nanyChangesAllowed: true,\ncancelAllowed: false\n}, \n802SG000007D0B3YAK\":
{\namendAllowed: false,\nanyChangesAllowed: true,\ncancelAllowed: false\n}",
      "salesTransactionId": "801SG00000jQ01ZYAW",
      "planState": "InProgress"
    },
    "sortOrder": -1,
    "version": 1
  }
]
```

Submit Order Action

Submit an order to Dynamic Revenue Orchestrator (DRO) for fulfillment.

By using the Submit Order action, you can perform:

- Order decomposition
- Fulfillment orchestration that's driven through message queues
- Dynamic plan composition that's based on the incoming order

This action is available in API version 61.0 and later.

Special Access Rules

The Submit Order action is available in Enterprise, Unlimited, and Developer Editions of Revenue Cloud. See the [required permissions](#) to access and call this invocable action.

Supported REST HTTP Methods

URI

`/services/data/v65.0/actions/standard/submitOrder`

Formats

JSON, XML

HTTP Methods

POST

Authentication

Authorization: Bearer *token*

Inputs

Input	Details
orderId	<p>Type string</p> <p>Description Required. ID of the order to submit to DRO.</p>
callType	<p>Type string</p> <p>Description Optional. Mode that the order intake must be processed in. Valid values are:</p> <ul style="list-style-type: none"> • Synchronous • Asynchronous <p>The default value is <code>Asynchronous</code>.</p>
contextId	<p>Type string</p> <p>Description Optional. ID of the hydrated context. See Context Service.</p>

Outputs

Output	Details
<code>errorCode</code>	<p>Type string</p> <p>Description Error code for the failed request, if any.</p>
<code>fulfillmentPlanId</code>	<p>Type string</p> <p>Description ID of the orchestrated fulfillment plan that's generated. Returned only if the <code>callType</code> value is <code>Synchronous</code>.</p>
<code>requestId</code>	<p>Type string</p> <p>Description Unique ID of the invocation request that helps identify a single request.</p>
<code>submitStatus</code>	<p>Type string</p> <p>Description Submit status of the invocation request.</p> <p>Valid values are:</p> <ul style="list-style-type: none">• SUCCESS• ERROR• SUBMITTED• REJECTED
<code>usedContextId</code>	<p>Type string</p> <p>Description Hydrated context ID that's used in this request, which can be different from the <code>contextId</code> input.</p>

Example

POST

This example shows a sample request.

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

```

        "orderId": "801RM0000007yGaYAI",
        "callType": "Synchronous"
    }
]
}

```

This example shows a sample response when the call type is synchronous.

```

[
  {
    "actionName": "submitOrder"
    "errors": NULL
    "invocationId": NULL
    "isSuccess": true
    "outputValues": {
      "requestId": "a161cfda-868c-41d2-b589-7c7d7ff2d4c1"
      "submitStatus": "SUCCESS"
      "usedContextId": "e275e930923106ee7e39cbfa232e38252bd4d63f4ea2dd956b7301e243554134"
      "fulfillmentPlanId": "13VZM00000000062AA"
    }
  }
]

```

This example shows a sample response when the call type is asynchronous or isn't specified.

```

[
  {
    "actionName": "submitOrder",
    "errors": null,
    "isSuccess": true,
    "outputValues": {
      "submitStatus": "SUBMITTED"
      "requestId": "a161cfda-868c-41d2-b589-7c7d7ff2d4c1"
    }
  }
]

```

This example shows a sample response when a validation error occurs.

```

[
  {
    "actionName": "submitOrder",
    "errors": [
      {
        "statusCode": "UNKNOWN_EXCEPTION",
        "message": "Missing required input parameter: orderId",
        "fields": []
      }
    ],
    "invocationId": null,
    "isSuccess": false,
    "outputValues": {
      "requestId": "4c7d8ebb-6b0b-4852-a8a0-b67e0d36a73e",
      "errorCode": "DRO_INTERNAL_ERROR"
    },
  }
]

```

Explainability Action Logs

To troubleshoot or debug errors, retrieve a list of explainability action logs. See [Action Logs](#).

Get logs for order intake

This resource example includes sample query parameters to retrieve the action logs for an order intake.

```
https://yourname.salesforce.com/services/data/v60.0/met/dro/explainability/actionlogs?applicationSubtype=DroSubmit,applicationType=DroSubmit,primaryFilter=801NA0000003ZAC
```

This example shows the sample response. The `actionLog` property contains the action logs.

```
{
  "actionLogs": [
    {
      "actionContextCode": "801NA000000XKPUYA4",
      "actionLog": {
        "OrderIntakeStatus": "",
        "OrderIntakeStatusMessage": "",
        "OrderId": "801NA000000XKPUYA4",
        "SubmitMode": "Synchronous",
        "UniqueRequestId": "d00c2aa7-56b0-411a-9b51-83d9fe2e4440",
        "ContextId": "a0ca3c2296c82ad071a5efa83e8974793910f44ebddb21d37f007ce4889b65d7",

        "DesActionSpecDevName": "DroSubmitAction",
        "ContextDefinition": "SalesTransactionContext__stdctx"
      },
      "additionalFilter": "undef",
      "applicationLogDate": "Thu Mar 28 12:36:26 GMT 2024",
      "applicationSubtype": "DroSubmit",
      "applicationType": "7",
      "explainabilitySpecName": "DroSubmitAction",
      "isChunked": false,
      "name": "DroSubmitAction",
      "primaryFilter": "801NA000000XKPUYA4",
      "processType": "DroSubmit",
      "secondaryFilter": "undef",
      "uniqueIdentifier": "02c4bae9-d8b0-42f6-b031-e983d4247c76"
    }
  ],
  "queryMore": ""
}
```

Get logs for decomposition scope

This resource example includes sample query parameters to retrieve the decomposition-related action logs.

```
https://yourname.salesforce.com/services/data/v60.0/met/dro/explainability/actionlogs?applicationSubtype=DroDecomposition,applicationType=DroDecomposition,primaryFilter=801NA0000003ZAC
```

This example shows the sample response. The `actionLog` property contains the action logs.

```
{
  "actionLogs": [
    {
      "actionContextCode": "801NA000000XKPeYAO",
      "actionLog": {
        "CandidateDecompositionRules": [
```

```

{
  "decompRuleId": "13UNA0000004C932AE",
  "SourceProductId": "01tNA0000007NP5YAM",
  "AssociatedOlis": [
    "802NA0000021WjOYAU"
  ],
  "DestinationProductId": "01tNA0000007NOvYAM",
  "DestinationProductScope": "Order",
  "ConfiguredContextRuleId": "null"
},
{
  "decompRuleId": "13UNA0000004ITY2A2",
  "SourceProductId": "01tNA0000007NP5YAM",
  "AssociatedOlis": [
    "802NA0000021WjOYAU"
  ],
  "DestinationProductId": "01tNA0000007NOqYAM",
  "DestinationProductScope": "Order",
  "ConfiguredContextRuleId": "null"
},
{
  "decompRuleId": "13UNA0000004C942AE",
  "SourceProductId": "01tNA0000007NPAYA2",
  "AssociatedOlis": [
    "802NA0000021WjKYAU"
  ],
  "DestinationProductId": "01tNA0000007NOWYAM",
  "DestinationProductScope": "Order",
  "ConfiguredContextRuleId": "null"
},
{
  "decompRuleId": "13UNA0000004ITd2AM",
  "SourceProductId": "01tNA0000007NPAYA2",
  "AssociatedOlis": [
    "802NA0000021WjKYAU"
  ],
  "DestinationProductId": "01tNA0000007NP0YAM",
  "DestinationProductScope": "Order",
  "ConfiguredContextRuleId": "null"
},
{
  "decompRuleId": "13UNA0000004C952AE",
  "SourceProductId": "01tNA0000007NPBYA2",
  "AssociatedOlis": [
    "802NA0000021WjLYAU"
  ],
  "DestinationProductId": "01tNA0000007NOxYAM",
  "DestinationProductScope": "Order",
  "ConfiguredContextRuleId": "9QwNA0000000CTu0AM"
},
{
  "decompRuleId": "13UNA0000004C982AE",
  "SourceProductId": "01tNA0000007NPCYA2",
  "AssociatedOlis": [

```

```

        "802NA0000021WjNYAU"
    ],
    "DestinationProductId": "01tNA0000007NOqYAM",
    "DestinationProductScope": "Order",
    "ConfiguredContextRuleId": "null"
  },
  {
    "decompRuleId": "13UNA0000004C992AE",
    "SourceProductId": "01tNA0000007NPCYA2",
    "AssociatedOlis": [
      "802NA0000021WjNYAU"
    ],
    "DestinationProductId": "01tNA0000007NOrYAM",
    "DestinationProductScope": "Order",
    "ConfiguredContextRuleId": "9QwNA0000000CTt0AM"
  }
],
"SelectedDecompositionRules": [
  {
    "OliId": "802NA0000021WjKYAU",
    "DecompositionRuleIds": [
      "13UNA0000004C942AE",
      "13UNA0000004ITd2AM"
    ]
  },
  {
    "OliId": "802NA0000021WjOYAU",
    "DecompositionRuleIds": [
      "13UNA0000004C932AE",
      "13UNA0000004ITY2A2"
    ]
  },
  {
    "OliId": "802NA0000021WjNYAU",
    "DecompositionRuleIds": [
      "13UNA0000004C982AE"
    ]
  }
],
"OliScopeDetails": [
  {
    "OliId": "802NA0000021WjLYAU",
    "ParentOliId": "802NA0000021WjOYAU",
    "BundleRootOli": "802NA0000021WjOYAU"
  },
  {
    "OliId": "802NA0000021WjMYAU",
    "ParentOliId": "802NA0000021WjOYAU",
    "BundleRootOli": "802NA0000021WjOYAU"
  },
  {
    "OliId": "802NA0000021WjKYAU",
    "ParentOliId": "802NA0000021WjOYAU",
    "BundleRootOli": "802NA0000021WjOYAU"
  }
]

```

```
    },
    {
      "OliId": "802NA0000021WjNYAU",
      "ParentOliId": "802NA0000021WjOYAU",
      "BundleRootOli": "802NA0000021WjOYAU"
    }
  ],
  "FoliComputationDetails": [
    {
      "FoliId": "0a4NA000003HYbWYAW",
      "ComputedAction": "AMEND",
      "ComputedQuantity": "3.0"
    },
    {
      "FoliId": "0a4NA000003HYbXYAW",
      "ComputedAction": "AMEND",
      "ComputedQuantity": "6.0"
    },
    {
      "FoliId": "0a4NA000003HYbYYAW",
      "ComputedAction": "AMEND",
      "ComputedQuantity": "3.0"
    },
    {
      "FoliId": "0a4NA000003HYbZYAW",
      "ComputedAction": "AMEND",
      "ComputedQuantity": "3.0"
    }
  ],
  "FlsrDetails": [
    {
      "FlsrId": "16ANA000005idR82AI",
      "FlsrGuid": "WQoYClnAszG9axKxWxoe",
      "SourceId": "802NA0000021WjOYAU",
      "FoliId": "0a4NA000003HYbWYAW"
    },
    {
      "FlsrId": "16ANA000005idR92AI",
      "FlsrGuid": "80xWFpBK8sDmTFRV3Dn0",
      "SourceId": "802NA0000021WjOYAU",
      "FoliId": "0a4NA000003HYbXYAW"
    },
    {
      "FlsrId": "16ANA000005idRA2AY",
      "FlsrGuid": "nAq19VD3KiziZTFrfYXq",
      "SourceId": "802NA0000021WjNYAU",
      "FoliId": "0a4NA000003HYbXYAW"
    },
    {
      "FlsrId": "16ANA000005idRB2AY",
      "FlsrGuid": "wgCJT6NJ3ESolFXP5ajQ",
      "SourceId": "802NA0000021WjKYAU",
      "FoliId": "0a4NA000003HYbYYAW"
    }
  ],
```

```

    {
      "FlsrId": "16ANA000005idRC2AY",
      "FlsrGuid": "bvVhA34WvTBOYbG4q2Fj",
      "SourceId": "802NA0000021WjKYAU",
      "FoliId": "0a4NA000003HYbZYAW"
    }
  ],
  "OrderId": "801NA000000XKPeYAO",
  "SubmitMode": "Synchronous",
  "UniqueRequestId": "b9ac5971-0d71-45c6-a18e-f472976eaae",
  "ContextId": "1422049ffa3cc42d8c060b9a7732be360bd62a346652cda9ab6e5fd54cd03eca",

  "DesActionSpecDevName": "DroDecompScopeAction",
  "ContextDefinition": "SalesTransactionContext__stdctx"
},
"additionalFilter": "undef",
"applicationLogDate": "Fri Mar 29 10:02:26 GMT 2024",
"applicationSubtype": "DroDcmp",
"applicationType": "7",
"explainabilitySpecName": "DroDecompScopeAction",
"isChunked": false,
"name": "DroDecompScopeAction",
"primaryFilter": "801NA000000XKPeYAO",
"processType": "DcmpScp",
"secondaryFilter": "undef",
"uniqueIdentifier": "c1e11bc0-53e5-4f62-9ae8-1096e79a62b6"
}
],
"queryMore": ""
}

```

Get logs for decomposition enrichment

This resource example includes sample query parameters to retrieve the logs for decomposition enrichment tasks. For example, conversion of order items to fulfillment order line items.

<https://yourname.com/docs/api/600/submit-order-log-splains-the-decomposition-process-for-primary-file-810003%20secondary-file-101248147>

The `secondaryFilter` property is optional. If this property is specified, the API returns the enrichment rule details for a decomposition rule. If this property is unspecified, the API returns all enrichment rule details for the order.

This example shows the sample response. The `actionLog` property contains the action logs.

```

{
  "actionLogs": [
    {
      "actionContextCode": "801NA000000XKPUYA4",
      "actionLog": {
        "FlsrUid": "1FxfIhMq530IpE9Hzs5w",
        "EnrichmentRulesExecutionDetails": [
          {
            "EnrichmentRuleId": "13TNA00000000eG2AQ",
            "DecompRuleId": "13UNA0000004C942AE",
            "FlsrUid": "1FxfIhMq530IpE9Hzs5w",
            "SourceType": "Attribute",

```

```
"SourceAttributeId": "0tjNA0000004CygYAE",
"TargetType": "Attribute",
"TargetAttributeId": "0tjNA0000004CyDYAU",
"CalculationMethod": "Ad-verbatim",
"ExecutionStatus": "SUCCESS"
},
{
  "EnrichmentRuleId": "13TNA00000000eH2AQ",
  "DecompRuleId": "13UNA0000004C942AE",
  "FlsrUid": "1FxfIhMq530IpE9Hzs5w",
  "SourceType": "Attribute",
  "SourceAttributeId": "0tjNA0000004CylYAE",
  "TargetType": "Attribute",
  "TargetAttributeId": "0tjNA0000004CyIYAU",
  "CalculationMethod": "Ad-verbatim",
  "ExecutionStatus": "SUCCESS"
},
{
  "EnrichmentRuleId": "13TNA00000000eI2AQ",
  "DecompRuleId": "13UNA0000004C942AE",
  "FlsrUid": "1FxfIhMq530IpE9Hzs5w",
  "SourceType": "Attribute",
  "SourceAttributeId": "0tjNA0000004CygYAE",
  "TargetType": "Attribute",
  "TargetAttributeId": "0tjNA0000004CyhYAE",
  "CalculationMethod": "Ad-verbatim",
  "ExecutionStatus": "SUCCESS"
},
{
  "EnrichmentRuleId": "13TNA00000000eJ2AQ",
  "DecompRuleId": "13UNA0000004C942AE",
  "FlsrUid": "1FxfIhMq530IpE9Hzs5w",
  "SourceType": "Attribute",
  "SourceAttributeId": "0tjNA0000004CzPYAU",
  "TargetType": "Attribute",
  "TargetAttributeId": "0tjNA0000004CymYAE",
  "CalculationMethod": "Ad-verbatim",
  "ExecutionStatus": "SUCCESS"
},
{
  "EnrichmentRuleId": "13TNA00000000eK2AQ",
  "DecompRuleId": "13UNA0000004C942AE",
  "FlsrUid": "1FxfIhMq530IpE9Hzs5w",
  "SourceType": "Attribute",
  "SourceAttributeId": "0tjNA0000004CzUYAU",
  "TargetType": "Attribute",
  "TargetAttributeId": "0tjNA0000004CyrYAE",
  "CalculationMethod": "Ad-verbatim",
  "ExecutionStatus": "SUCCESS"
},
{
  "EnrichmentRuleId": "13TNA00000000eL2AQ",
  "DecompRuleId": "13UNA0000004C942AE",
  "FlsrUid": "1FxfIhMq530IpE9Hzs5w",
```



```
    "SourceType": "Attribute",
    "SourceAttributeId": "0tjNA0000004CzZYAU",
    "TargetType": "Attribute",
    "TargetAttributeId": "0tjNA0000004CywYAE",
    "CalculationMethod": "Ad-verbatim",
    "ExecutionStatus": "SUCCESS"
  },
  {
    "EnrichmentRuleId": "13TNA00000000eM2AQ",
    "DecompRuleId": "13UNA0000004C942AE",
    "FlsrUid": "1FxfIhMq530Ipe9Hzs5w",
    "SourceType": "Attribute",
    "SourceAttributeId": "0tjNA0000004D0dYAE",
    "TargetType": "Attribute",
    "TargetAttributeId": "0tjNA0000004Cz1YAE",
    "CalculationMethod": "Ad-verbatim",
    "ExecutionStatus": "ERROR_DATA_TYPE_MISMATCH"
  },
  {
    "EnrichmentRuleId": "13TNA00000000eN2AQ",
    "DecompRuleId": "13UNA0000004C942AE",
    "FlsrUid": "1FxfIhMq530Ipe9Hzs5w",
    "SourceType": "Attribute",
    "SourceAttributeId": "0tjNA0000004D0iYAE",
    "TargetType": "Attribute",
    "TargetAttributeId": "0tjNA0000004CzQYAU",
    "CalculationMethod": "Ad-verbatim",
    "ExecutionStatus": "ERROR_DATA_TYPE_MISMATCH"
  },
  {
    "EnrichmentRuleId": "13TNA00000000eO2AQ",
    "DecompRuleId": "13UNA0000004C942AE",
    "FlsrUid": "1FxfIhMq530Ipe9Hzs5w",
    "SourceType": "Attribute",
    "SourceAttributeId": "0tjNA0000004D18YAE",
    "TargetType": "Attribute",
    "TargetAttributeId": "0tjNA0000004CzVYAU",
    "CalculationMethod": "Ad-verbatim",
    "ExecutionStatus": "ERROR_DATA_TYPE_MISMATCH"
  },
  {
    "EnrichmentRuleId": "13TNA00000000eP2AQ",
    "DecompRuleId": "13UNA0000004C942AE",
    "FlsrUid": "1FxfIhMq530Ipe9Hzs5w",
    "SourceType": "Attribute",
    "SourceAttributeId": "0tjNA0000004D1QYAU",
    "TargetType": "Attribute",
    "TargetAttributeId": "0tjNA0000004CzaYAE",
    "CalculationMethod": "Ad-verbatim",
    "ExecutionStatus": "ERROR_DATA_TYPE_MISMATCH"
  }
],
"OrderId": "801NA000000XKPUYA4",
"SubmitMode": "Synchronous",
```

```

    "UniqueRequestId": "d00c2aa7-56b0-411a-9b51-83d9fe2e4440",
    "ContextId": "a0ca3c2296c82ad071a5efa83e8974793910f44ebddb21d37f007ce4889b65d7",

    "DesActionSpecDevName": "DroDecompEnrichmentAction",
    "ContextDefinition": "SalesTransactionContext__stdctx"
  },
  "additionalFilter": "undef",
  "applicationLogDate": "Thu Mar 28 12:36:25 GMT 2024",
  "applicationSubtype": "DroDcmp",
  "applicationType": "7",
  "explainabilitySpecName": "DroDecompEnrichmentAction",
  "isChunked": false,
  "name": "DroDecompEnrichmentAction",
  "primaryFilter": "801NA000000XKPUYA4",
  "processType": "DcmpEnrich",
  "secondaryFilter": "1FxfIhMq530Ipe9Hzs5w",
  "uniqueIdentifier": "0bd42942-12b2-4c2e-9f10-b77ee85fd20b"
}
],
"queryMore": ""
}

```

Get logs for plan composition

This resource example includes sample query parameters to retrieve the logs for plan composition.

<https://yourname.salesforce.com/services/data/v50.0/meta/define/plan/composition/action-logs?applicationType=DroDcmp&applicationType=ProcessType=&primaryFilter=801NA000000XKPUYA4>

This example shows the sample response. The `actionLog` property contains the action logs.

```

{
  "actionLogs": [
    {
      "actionContextCode": "801NA000000XKPeYAO",
      "actionLog": {
        "PlanCompositionStatus": "",
        "PlanCompositionStatusMessage": "",
        "CandidateProductFulfillmentScenarios": [
          {
            "ProductFulfillmentScenarioId": "1axNA0000004C93YAE",
            "ProductId": "01tNA0000007NP5YAM",
            "FulfillmentStepDefinitionGroupId": "13oNA0000004CARYA2",
            "LineItemIds": [
              "802NA00000021WjOYAU"
            ],
            "ContextRulesetId": "9QwNA0000000CXq0AM"
          }
        ],
        "SelectedProductFulfillmentScenarios": [
          null
        ],
        "SelectedProductFulfillmentScenariosByOli": [
          {
            "OliId": "0a4NA0000003HYbFYAW",
            "ProductFulfillmentScenarios": [

```

```

        null
      ]
    },
    {
      "OliId": "0a4NA000003HYbXYAW",
      "ProductFulfillmentScenarios": [
        null
      ]
    },
    {
      "OliId": "0a4NA000003HYbIYAW",
      "ProductFulfillmentScenarios": [
        null
      ]
    },
    {
      "OliId": "802NA0000021WjOYAU",
      "ProductFulfillmentScenarios": [
        null
      ]
    }
  ],
  "PlanId": "13VNA000000Q9W2AW",
  "FulfillmentStepCreationStatus": "FulfillmentStepsCreated",
  "FulfillmentStepDependencyCreationStatus": "FulfilmentStepDepCreated",
  "OrderId": "801NA000000XKPeYAO",
  "SubmitMode": "Synchronous",
  "UniqueRequestId": "b9ac5971-0d71-45c6-a18e-f472976eaeae",
  "ContextId": "1422049ffa3cc42d8c060b9a7732be360bd62a346652cda9ab6e5fd54cd03eca",

  "DesActionSpecDevName": "DroPlanCompStepsAction",
  "ContextDefinition": "SalesTransactionContext__stdctx"
},
"additionalFilter": "undef",
"applicationLogDate": "Fri Mar 29 10:02:27 GMT 2024",
"applicationSubtype": "DroPcmp",
"applicationType": "7",
"explainabilitySpecName": "DroPlanCompStepsAction",
"isChunked": false,
"name": "DroPlanCompStepsAction",
"primaryFilter": "801NA000000XKPeYAO",
"processType": "PcmpSteps",
"secondaryFilter": "undef",
"uniqueIdentifier": "bb532c9b-a88f-4add-8cd8-bd385359blad"
}
],
"queryMore": ""
}

```

Capture logs for an order

This resource example includes sample query parameters to retrieve the logs for an order.

<https://yourinstance.salesforce.com/services/data/v65.0/connect/decision-explainer/action-logs?actionContextCode=801NA000000XKPeYAO&applicationType=7>

This example shows the sample response. The `actionLog` property contains the action logs.

```
{
  "actionLogs": [
    {
      "actionContextCode": "801xx000003GZSxAAO",
      "actionLog":
      [REDACTED]

      "additionalFilter": "undef",
      "applicationLogDate": "Tue May 07 13:05:28 GMT 2024",
      "applicationSubtype": "DroDcmp",
      "applicationType": "7",
      "explainabilitySpecName": "DroDecompEnrichmentAction",
      "isChunked": false,
      "name": "DroDecompEnrichmentAction",
      "primaryFilter": "801xx000003GZSxAAO",
      "processType": "DcmpEnrich",
      "secondaryFilter": "qrh0Z3xv6buew1BW0wdn",
      "uniqueIdentifier": "768f7d03-6770-4939-980f-a6f42ad07cde"
    },
    {
      "actionContextCode": "801xx000003GZSxAAO",
      "actionLog":
      [REDACTED]

      "additionalFilter": "undef",
      "applicationLogDate": "Tue May 07 13:05:28 GMT 2024",
      "applicationSubtype": "DroDcmp",
      "applicationType": "7",
      "explainabilitySpecName": "DroDecompEnrichmentAction",
      "isChunked": false,
      "name": "DroDecompEnrichmentAction",
      "primaryFilter": "801xx000003GZSxAAO",
      "processType": "DcmpEnrich",
      "secondaryFilter": "hjoy5L3YcntZsnNuEd5n",
      "uniqueIdentifier": "7ce652e3-81a0-4b2d-a072-88b012c83864"
    },
    {
      "actionContextCode": "801xx000003GZSxAAO",
      "actionLog":
      [REDACTED]

      "additionalFilter": "undef",
      "applicationLogDate": "Tue May 07 13:05:32 GMT 2024",
      "applicationSubtype": "DroDcmp",
      "applicationType": "7",
      "explainabilitySpecName": "DroDecompScopeAction",
      "isChunked": false,
      "name": "DroDecompScopeAction",
      "primaryFilter": "801xx000003GZSxAAO",
      "processType": "DcmpScp",
      "secondaryFilter": "undef",
      "uniqueIdentifier": "9f633a63-67d0-4f90-b4dc-c368defe8b44"
    },
  ],
}
```

```

{
  "actionContextCode": "801xx000003GZSxAAO",
  "actionLog":
  [
    {
      "additionalFilter": "undef",
      "applicationLogDate": "Tue May 07 13:05:33 GMT 2024",
      "applicationSubtype": "DroPcmp",
      "applicationType": "7",
      "explainabilitySpecName": "DroPlanCompStepsAction",
      "isChunked": false,
      "name": "DroPlanCompStepsAction",
      "primaryFilter": "801xx000003GZSxAAO",
      "processType": "PcmpSteps",
      "secondaryFilter": "undef",
      "uniqueIdentifier": "47a956a6-ae52-4e4a-843b-08b404beb52a"
    },
    {
      "actionContextCode": "801xx000003GZSxAAO",
      "actionLog":
      [
        {
          "additionalFilter": "undef",
          "applicationLogDate": "Tue May 07 13:06:30 GMT 2024",
          "applicationSubtype": "DroSubmit",
          "applicationType": "7",
          "explainabilitySpecName": "DroSubmitAction",
          "isChunked": false,
          "name": "DroSubmitAction",
          "primaryFilter": "801xx000003GZSxAAO",
          "processType": "DroSubmit",
          "secondaryFilter": "undef",
          "uniqueIdentifier": "278caec4-680c-4df8-a1b2-608e05e44baa"
        }
      ],
      "queryMore": ""
    }
  ]
}

```

Submit Sales Transaction Action

Initiate the fulfillment process of any sales transaction, such as a quote, an order, or an order summary.

Specify the ID of the sales transaction to be fulfilled. The fulfillment process includes these steps.

- Intake process
- Fulfillment orchestration

The intake process happens synchronously or asynchronously, which is specified by using the `intakeRequestType` input parameter. You can also specify the priority for the execution of the fulfillment process, which is specified by using the `fulfillmentPriority` parameter.

This action is available in API version 63.0 and later.

Special Access Rules

The Submit Sales Transaction action is available in Enterprise, Unlimited, and Developer Editions of Revenue Cloud. See the [required permissions](#) to access and call this invocable action.

Supported REST HTTP Methods

URI

`/services/data/v65.0/actions/standard/submitSalesTransaction`

Formats

JSON, XML

HTTP Methods

POST

Authentication

Authorization: Bearer *token*

Inputs

Input	Details
<code>allowOverrideOfPointOfNoReturn</code>	<p>Type</p> <p>boolean</p> <p>Description</p> <p>Indicates whether to override the point of no return setting for the fulfillment step (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>. Available in API version 64.0 and later.</p>
<code>fulfillmentAdapter</code>	<p>Type</p> <p>string</p> <p>Description</p> <p>Type of fulfillment adapter. Valid values are:</p> <ul style="list-style-type: none"> • <code>StandardOrder</code> • <code>GenericAdapter</code>—Available in API version 64.0 and later.
<code>fulfillmentPriority</code>	<p>Type</p> <p>string</p> <p>Description</p> <p>Priority to fulfill the sales transaction. Valid values are:</p> <ul style="list-style-type: none"> • <code>High</code> • <code>Bulk</code> • <code>Default</code>

Input	Details
hydratedContextId	<p>Type</p> <p>string</p> <p>Description</p> <p>ID of the hydrated context.</p>
intakeRequestType	<p>Type</p> <p>string</p> <p>Description</p> <p>Type of request to process the intake. Valid values are:</p> <ul style="list-style-type: none"> • Synchronous • Asynchronous
priorityLimitAction	<p>Type</p> <p>string</p> <p>Description</p> <p>Type of action to perform when the priority limit is reached. Valid values are:</p> <ul style="list-style-type: none"> • Reject • Downgrade <p>This parameter is applicable only when you specify the <code>fulfillmentPriority</code> parameter.</p>
salesTransactionId	<p>Type</p> <p>id</p> <p>Description</p> <p>Required. ID of the sales transaction to submit.</p>

Outputs

Output	Details
errorCode	<p>Type</p> <p>string</p> <p>Description</p> <p>Code indicating the type of error.</p>
fulfillmentPlanId	<p>Type</p> <p>id</p> <p>Description</p> <p>ID of the composed fulfillment plan.</p>

Output	Details
requestedFulfillmentPriority	<p>Type</p> <p>string</p> <p>Description</p> <p>Priority to fulfill the sales transaction. Valid values are:</p> <ul style="list-style-type: none"> • High • Bulk • Default
requestId	<p>Type</p> <p>string</p> <p>Description</p> <p>Request ID of the invocation.</p>
resolvedFulfillmentPriority	<p>Type</p> <p>string</p> <p>Description</p> <p>Resolved priority to fulfill the sales transaction.</p>
submitStatus	<p>Type</p> <p>string</p> <p>Description</p> <p>Submit status of the invocation.</p>
usedContextId	<p>Type</p> <p>string</p> <p>Description</p> <p>ID of the used context that updates the decomposition process.</p>

Example

POST

This sample request is for the Submit Sales Transaction action.

```
{
  "inputs": [
    {
      "allowOverrideOfPointOfNoReturn": false,
      "salesTransactionId": "801DV000000CbIPYA0",
      "intakeRequestType": "Synchronous",
      "fulfillmentAdapter": "StandardOrder",
      "fulfillmentPriority": "Default",
    }
  ]
}
```



```

    "priorityLimitAction": "Reject"
  }
]
}

```

This sample response is for the Submit Sales Transaction action.

```

[
  {
    "actionName": "submitSalesTransaction",
    "errors": null,
    "invocationId": null,
    "isSuccess": true,
    "outcome": null,
    "outputValues": {
      "submitStatus": "SUCCESS",
      "resolvedFulfillmentPriority": "Default",
      "requestedFulfillmentPriority": "Default",
      "usedContextId": "0abc8db32b30d09c5051e4561f0b39d938a3bd8db4ccb13e04d41019e427211d",

      "requestId": "927f72b7-85e0-4b5d-b92e-c265f41898f0",
      "fulfillmentPlanId": "13VDV00000008M92AI"
    },
    "sortOrder": -1,
    "version": 1
  }
]

```

Unfreeze Sales Transaction Action

Unfreeze a sales transaction to enable the modification of a line item.

A line item can reach a milestone in the fulfillment process, which is known as a point of no return, where the line item can't accept modifications. Get details about the point of no return for each line item of a sales transaction.

This action is available in API version 64.0 and later.

Special Access Rules

The Unfreeze Sales Transaction action is available in Enterprise, Unlimited, and Developer Editions of Revenue Cloud. See the [required permissions](#) to access and call this invocable action.

Supported REST HTTP Methods

URI

`/services/data/v65.0/actions/standard/unfreezeSalesTransaction`

Formats

JSON, XML

HTTP Methods

POST

Authentication

Authorization: Bearer *token*

Inputs

Input	Details
salesTransactionId	Type id Description Required. ID of the sales transaction that's submitted to the Dynamic Revenue Orchestrator.

Outputs

Output	Details
errorCode	Type string Description Code indicating the type of error.
orchestrationPlanId	Type id Description ID of the created orchestration plan.
planState	Type string Description Status of the created orchestration plan. Valid values are: <ul style="list-style-type: none">• FAILURE• NOTSTARTED• PENDING• COMPLETED• FROZEN• INPROGRESS
requestId	Type string Description ID of the request to get the point of no return details.

Output	Details
salesTransactionId	<p>Type</p> <p>string</p> <p>Description</p> <p>ID of the sales transaction that's submitted to the Dynamic Revenue Orchestrator.</p>

Example

POST

This sample request is for the Unfreeze Sales Transaction action.

```
{
  "inputs": [
    {
      "salesTransactionId": "801SG00000jQO1ZYAW"
    }
  ]
}
```

This sample response is for the Unfreeze Sales Transaction action.

```
[
  {
    "actionName": "unfreezeSalesTransaction",
    "errors": null,
    "invocationId": null,
    "isSuccess": true,
    "outcome": null,
    "outputValues": {
      "orchestrationPlanId": "13VSG00000229Z72AI",
      "salesTransactionId": "801SG00000jQO1ZYAW",
      "planState": "InProgress",
      "requestId": "e9f2d961-b218-4911-8fee-8de31937850d"
    },
    "sortOrder": -1,
    "version": 1
  }
]
```

Dynamic Revenue Orchestrator Metadata API Types

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

[Flow for Dynamic Revenue Orchestrator](#)

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.

[DynamicFulfillmentOrchestratorSettings](#)

Represents the settings for Dynamic Revenue Orchestrator.

SEE ALSO:

[Metadata API Developer Guide: Understanding Metadata API](#)

Flow for Dynamic Revenue Orchestrator

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

FlowActionCall

Dynamic Revenue Orchestrator exposes additional `actionType` values for the `FlowActionCall` Metadata type.

Field Name	Field Type	Description
<code>actionType</code>	InvokableActionType (enumeration of type string)	<p>Required.</p> <p>The action type. Additional valid values only for Dynamic Revenue Orchestrator include:</p> <ul style="list-style-type: none"> <code>submitOrder</code>—Submit an order to Dynamic Revenue Orchestrator (DRO) for fulfillment.

DynamicFulfillmentOrchestratorSettings

Represents the settings for Dynamic Revenue Orchestrator.

Parent Type and Manifest Access

This type extends the [Metadata](#) metadata type and inherits its `fullName` field.

In the package manifest, all the settings metadata types for the org are accessed using the “Settings” name. See [Settings](#) for more details.

File Suffix and Directory Location

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

Version

`DynamicFulfillmentOrchestratorSettings` components are available in API version 61.0 and later.

Fields

Field Name	Description
<code>enableDFOFallout</code>	<p>Field Type boolean</p> <p>Description Indicates whether to enable fallout management to handle fallouts and retry policies (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>. See Turn On Feature to Manage Fallout.</p>
<code>enableDFOJeopardy</code>	<p>Field Type boolean</p> <p>Description Indicates whether to enable management of Service Level Agreements (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>. See Turn On Feature to Manage Service Level Agreements.</p>
<code>enableDFOPref</code>	<p>Field Type boolean</p> <p>Description Indicates whether to enable features of Dynamic Revenue Orchestrator (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>. See Turn On Dynamic Revenue Orchestrator.</p>
<code>enableDROFutureDatedTasks</code>	<p>Field Type boolean</p> <p>Description Indicates whether to enable the Future Dated Steps feature (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>. See Enable Future Dated Steps. Available in API version 63.0 and later.</p>
<code>enableDROInflightRequest</code>	<p>Field Type boolean</p> <p>Description Indicates whether to allow changes to fulfillment requests that are in progress (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>. Available in API version 64.0 and later.</p>
<code>enableDROTaskSource</code>	<p>Field Type boolean</p> <p>Description Indicates whether to link a Salesforce manual task to a fulfillment step source (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>. See Enable the Linking of Task to Step Source. Available in API version 63.0 and later.</p>

Declarative Metadata Sample Definition

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

```
<DynamicFulfillmentOrchestratorSettings xmlns="http://soap.sforce.com/2006/04/metadata">
  <enableDFOPref>true</enableDFOPref>
  <enableDFOFallout>true</enableDFOFallout>
  <enableDFOJeopardy>true</enableDFOJeopardy>
  <enableDROFutureDatedTasks>true</enableDROFutureDatedTasks>
  <enableDROInflightRequest>true</enableDROInflightRequest>
  <enableDROTaskSource>true</enableDROTaskSource>
</DynamicFulfillmentOrchestratorSettings>
```

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>DynamicFulfillmentOrchestrator</members>
    <name>Settings</name>
  </types>
  <version>65.0</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](#).

Dynamic Revenue Orchestrator 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.

[CustomFulfillmentScopeCnfg](#)


Represents a user-defined scope to define and customize scope-specific validation and orchestration for flexible fulfillment. This object is available in API version 64.0 and later.

SEE ALSO:

[Tooling API Developer Guide: Introducing Tooling API](#)

CustomFulfillmentScopeCnfg

Represents a user-defined scope to define and customize scope-specific validation and orchestration for flexible fulfillment. This object is available in API version 64.0 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
AssetContextTag	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Context tag that's used to derive custom scope value from assets. This field is available in API version 65.0 and later.</p>
DeveloperName	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. Name of the custom fulfillment scope.</p>
DoesParticipatingAssetImpact	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Required. Indicates whether the technical assets related to sales transactions impact the fulfillment line item actions (<code>true</code>) or not (<code>false</code>). If set to <code>true</code>, Dynamic Revenue Orchestrator reuses the existing technical assets with the same custom value. The default value is <code>false</code>.</p>
FallbackScope	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p>

Field	Details
	<p>Description</p> <p>Scope that's used when custom scope can't be determined.</p> <p>Valid value is:</p> <ul style="list-style-type: none"> • <code>LineItem</code> <p>If an empty value is returned, then ID of the line item is used.</p> <p>The default value is <code>LineItem</code>.</p>
<code>IsAssetized</code>	<p>Type</p> <p>boolean</p> <p>Properties</p> <p>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description</p> <p>Indicates whether the fulfillment line items grouped by the custom scope are assetized <code>true</code> or not (<code>false</code>). If set to <code>false</code>, then the scope can't be associated with assetizable products.</p> <p>The default value is <code>false</code>.</p>
<code>ItemContextTag</code>	<p>Type</p> <p>string</p> <p>Properties</p> <p>Create, Filter, Group, Sort, Update</p> <p>Description</p> <p>Required.</p> <p>Context tag that's used to derive custom scope from item context nodes. The supported value is of string type only.</p>
<code>Language</code>	<p>Type</p> <p>picklist</p> <p>Properties</p> <p>Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description</p> <p>The language of the CustomFulfillmentScopeCnfg tooling API object.</p>
<code>ManageableState</code>	<p>Type</p> <p>ManageableState enumerated list</p> <p>Properties</p> <p>Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description</p> <p>Indicates the manageable state of the specified component that is contained in a package:</p> <ul style="list-style-type: none"> • <code>beta</code>

Field	Details
	<ul style="list-style-type: none"> deleted deprecated deprecatedEditable installed installedEditable released unmanaged
MasterLabel	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Label of the custom fulfillment scope.</p>
NamespacePrefix	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>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 <i>namespacePrefix__componentName</i> notation.</p> <p>The namespace prefix can have one of the following values:</p> <ul style="list-style-type: none"> In Developer Edition organizations, the namespace prefix is set to the namespace prefix of the organization for all objects that support it. There is an exception if an object is in an installed managed package. In that case, the object has the namespace prefix of the installed managed package. This field's value is the namespace prefix of the Developer Edition organization of the package developer. In organizations that are not Developer Edition organizations, <code>NamespacePrefix</code> is only set for objects that are part of an installed managed package. There is no namespace prefix for all other objects.

Callouts in Dynamic Revenue Orchestrator

Use callout step types to make HTTP calls to an external system. Callout step types use the Data Consumption Framework and Process Type Integration for interface management and communication with external systems.

Use callout step types to implement these features.

- Endpoint configuration

- Authentication parameters
- Default sync and async implementation
- Extensions or Apex Interfaces
- Error handling and fallout management
- Request and response logging
- Timeouts

Dynamic Revenue Orchestrator supports these types of callouts.

Type	Description
Standard Fulfillment Provider	Use this callout provider to use a fixed payload structure to request an order. You can also define Omnistudio Integration Procedures for request transformation and response handling.
Apex Type Provider	Use this callout provider to implement custom integration scenarios via the <code>industriesintegrationfwk.ProcessIntegrationProvider</code> Apex interface.
External Services Defined Provider	Use this callout provider to implement custom integration scenarios via external services through the OpenAPI specification. You can also define Omnistudio Integration Procedures for request transformation and response handling. To use this callout, the Omnistudio Admin and Omnistudio Runtime permissions are required.

Callouts support these integration patterns.

Type	Description
Sync	The callout step is completed when the external system returns a response.
Async	The callout step is set to <code>In Progress</code> when the external system returns the acknowledgment response with 202 HTTP code. The system waits until the external system sends a callback response to complete the callout step. See Asynchronous Interaction Pattern on page 1380.

[Configure Callout Settings](#)

Before you set up a callout provider, configure the callout settings. The settings include the creation of a named credential and an external credential, the creation of an integration definition, and the configuration of a fulfillment step definition.

[Standard Fulfillment Provider](#)

The Standard Fulfillment Provider or `CalloutIntegrationProvider` is a provider for the order fulfillment usage type. A Fulfillment Designer can configure this provider.

[Apex Type Provider](#)

Implement custom integration logic via Apex by using the Apex Type Provider. This provider requires an Apex Integration Developer to implement a custom Apex adapter interface.

[External Services Defined Provider](#)

Generate interface contract and Apex types by using external services and Open API compatible schema.

[Asynchronous Interaction Pattern](#)

To specify an asynchronous request, you must add the callback URI to the integration definition for Standard Fulfillment Provider or Apex Type Provider as an optional attribute.

[Input and Output Transformation Processors](#)

Use input and output processors to process a standard fulfillment request before sending it to an external system.

SEE ALSO:

[Salesforce Help: Data Consumption Framework](#)

Configure Callout Settings

Before you set up a callout provider, configure the callout settings. The settings include the creation of a named credential and an external credential, the creation of an integration definition, and the configuration of a fulfillment step definition.

Meet these prerequisites before you configure the callout settings.

- Configure named and external credentials to define access to an external system. Specify a named credential as the callout endpoint and an external credential to configure the authentication protocol.
See [Create Named Credentials and External Credentials](#).
- Create integration definitions to connect Salesforce with an external system. Integration definitions use APIs to perform operations in both Salesforce and the external system. You can create Apex Defined, External Services Defined, or Standard integration definitions.
See [Create an Integration Definition](#).
- Define a fulfillment step with `Callout` as the step type. Additionally, set the integration definition name and integration user.
See [Callout Fulfillment Step](#).

EDITIONS

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

USER PERMISSIONS

To create authenticated callouts:

- External Credentials Principal Access Permission

Standard Fulfillment Provider

The Standard Fulfillment Provider or `CalloutIntegrationProvider` is a provider for the order fulfillment usage type. A Fulfillment Designer can configure this provider.

The Standard Fulfillment Provider includes these features.

- Predefined payload with sales transaction items and fulfillment items data, including attribute values
- Fixed integration parameters such as timeouts, credentials, encoding styles, and path. See [Integration Definition for Standard Fulfillment Provider](#) on page 1372 for details about the integration parameters.
- Modified requests and responses via Omnistudio Integration Procedures
- Asynchronous interaction pattern. See [Asynchronous Interaction Pattern](#) on page 1380.

- Request and response logging
- Error handling and retry policies. See [Fallout Design and Management](#).
- Request transformation and response handling via integration procedures

To configure the callout settings for Standard Fulfillment Provider, see [Configuration Steps](#).

Request Payload

This example shows a sample request payload structure with data for sales transaction items and fulfillment transaction items. This data is derived using context definition mappings that are defined through settings. See [Context Definitions in Order Orchestration](#).

```
{
  "AccountId": "001xx000003GbsxAAC",
  "OrderId": "801xx000003GbsyAAC",
  "StepId": "802xx000001ndnyAAA",
  "PlanSourceId": "802xx000001ndnyAAA",
  "StepSourceId": "13Wxx0000004Cdh",
  "CorrelationId": "callout:13Wxx0000004Cdh:",
  "SalesTransactionItems": [
    {
      "ArePartialPeriodsAllowed": "false",
      "ParentReference": "801xx000003GbsyAAC",
      "IsAssetizable": "true",
      "ProductName": "iPhone18",
      "ProductCode": "iPhone18",
      "SalesTransactionItemParent": "801xx000003GbsyAAC",
      "Attributes": [
        {
          "AttributeKey": "0tjxx00000000ePAAQ",
          "ParentReference": "802xx000001ndnxAAA",
          "AttributeValue": "true",
          "AttributeName": "IsDeliveryNotificationNeeded",
          "AttributeDefinitionCode": "FDT5",
          "SalesTransactionItemAttrParent": "802xx000001ndnxAAA"
        },
        {
          "AttributeKey": "0tjxx00000000eNAAQ",
          "ParentReference": "802xx000001ndnxAAA",
          "AttributeValue": "10",
          "AttributeName": "FDTCharge",
          "AttributeDefinitionCode": "FDT3",
          "SalesTransactionItemAttrParent": "802xx000001ndnxAAA"
        }
      ]
    },
    {
      "Product": "01txx0000006igoAAA",
      "Quantity": "1.0",
      "ListPrice": "1.0",
      "ItemTotalAdjustmentAmount": "0.0",
      "SalesTransactionItemSource": "802xx000001ndnxAAA",
      "PricebookEntry": "01luxx0000008zT8AAI",
      "StartDate": "2024-10-15T00:00:00.000Z",
      "UnitPrice": "1.0",
      "RoundedLineAmount": "1.0",
      "EndQuantity": "1.0",
    }
  ]
}
```

```

    "TotalTaxAmount": "0.0",
    "IsItemLocked": "false",
    "TotalPrice": "1.0",
    "ProductBasedOn": "11Bxx000002C9M2EAK",
    "SalesTransactionActionType": "Add",
    "SalesTransactionAction": "80Axx0000004DGOGA2"
  },
  {
    "ArePartialPeriodsAllowed": "false",
    "ParentReference": "801xx000003GbsyAAC",
    "IsAssetizable": "true",
    "ProductName": "iPhone19",
    "ProductCode": "iPhone19",
    "SalesTransactionItemParent": "801xx000003GbsyAAC",
    "Attributes": [
      {
        "AttributeKey": "0tjxx00000000eQAAQ",
        "ParentReference": "802xx000001ndnyAAA",
        "AttributeValue": "false",
        "AttributeName": "IsDelivered",
        "AttributeDefinitionCode": "FDT6",
        "SalesTransactionItemAttrParent": "802xx000001ndnyAAA"
      }
    ]
  },
  "Product": "01txx0000006igpAAA",
  "Quantity": "1.0",
  "ListPrice": "1.0",
  "ItemTotalAdjustmentAmount": "0.0",
  "SalesTransactionItemSource": "802xx000001ndnyAAA",
  "PricebookEntry": "01luxx0000008zTAAAY",
  "StartDate": "2024-10-20T00:00:00.000Z",
  "UnitPrice": "1.0",
  "RoundedLineAmount": "1.0",
  "EndQuantity": "1.0",
  "TotalTaxAmount": "0.0",
  "IsItemLocked": "false",
  "TotalPrice": "1.0",
  "ProductBasedOn": "11Bxx000002C9M2EAK",
  "SalesTransactionActionType": "Add",
  "SalesTransactionAction": "80Axx0000004DGOGA2",
  "SalesTrxnItemDescription": "TrackingRef:TRK-HUBSWQT18-4238"
}
],
"FulfillmentTransactionItems": [
  {
    "ParentReference": "0a3xx00000000JOAAY",
    "OriginalQuantity": "2.0",
    "FulfillmentItemSource": "0a4xx00000000JOAAY",
    "Attributes": [
      {
        "FulfillmentOrderLineId": "0a4xx00000000JOAAY",
        "LineAttributeDefinitionCode": "FDT6",
        "ParentReference": "0a4xx00000000JOAAY",
        "LineAttributeName": "IsDelivered",

```

```

    "LineAttributeValue": "false",
    "LineAttributeKey": "0tjxx00000000eQAAQ"
  },
  {
    "FulfillmentOrderLineId": "0a4xx00000000JOAAY",
    "LineAttributeDefinitionCode": "FDT2",
    "ParentReference": "0a4xx00000000JOAAY",
    "LineAttributeName": "FDTColor",
    "LineAttributeKey": "0tjxx00000000eMAAQ"
  },
  {
    "FulfillmentOrderLineId": "0a4xx00000000JOAAY",
    "LineAttributeDefinitionCode": "FDT1",
    "ParentReference": "0a4xx00000000JOAAY",
    "LineAttributeName": "FDTSize",
    "LineAttributeKey": "0tjxx00000000eLAAQ"
  }
],
"FulfillmentItemAction": "ADD",
"FulfillmentItemProductCode": "iPhone-Pack",
"FulfillmentOrderItemQuantity": "2.0",
"FulfillmentItemProductName": "iPhone-Pack",
"FulfillmentOrderId": "0a3xx00000000JOAAY",
"FulfillmentItemTypeCode": "Product",
"FulfillmentItemType": "Order Product",
"FulfillmentOrderNumber": "FO-0002",
"FulfillmentItemStartDate": "2024-10-20T00:00:00.000Z",
"FulfillmentItemProductId": "01txx00000006igqAAA"
},
{
  "ParentReference": "0a3xx00000000JNAAY",
  "OriginalQuantity": "2.0",
  "FulfillmentItemSource": "0a4xx00000000JNAAY",
  "Attributes": [
    {
      "FulfillmentOrderLineId": "0a4xx00000000JNAAY",
      "LineAttributeDefinitionCode": "FDT2",
      "ParentReference": "0a4xx00000000JNAAY",
      "LineAttributeName": "FDTColor",
      "LineAttributeKey": "0tjxx00000000eMAAQ"
    },
    {
      "FulfillmentOrderLineId": "0a4xx00000000JNAAY",
      "LineAttributeDefinitionCode": "FDT5",
      "ParentReference": "0a4xx00000000JNAAY",
      "LineAttributeName": "IsDeliveryNotificationNeeded",
      "LineAttributeValue": "false",
      "LineAttributeKey": "0tjxx00000000ePAAQ"
    },
    {
      "FulfillmentOrderLineId": "0a4xx00000000JNAAY",
      "LineAttributeDefinitionCode": "FDT3",
      "ParentReference": "0a4xx00000000JNAAY",
      "LineAttributeName": "FDTCharge",

```

```

        "LineAttributeKey": "0tjxx0000000eNAAQ"
    }
  ],
  "FulfillmentItemAction": "ADD",
  "FulfillmentItemProductCode": "iPhone-Tech",
  "FulfillmentOrderItemQuantity": "2.0",
  "FulfillmentItemProductName": "iPhone-Tech",
  "FulfillmentOrderId": "0a3xx0000000JNAAy",
  "FulfillmentItemTypeCode": "Product",
  "FulfillmentItemType": "Order Product",
  "FulfillmentOrderNumber": "FO-0001",
  "FulfillmentItemStartDate": "2024-10-10T00:00:00.000Z",
  "FulfillmentItemProductId": "01txx0000006igrAAA"
}
]
}

```

The step source ID of the fulfillment step, which is either a related order or fulfillment item, determines the payload composition with these considerations.

- If the step source ID is an order item, then all order items of the order are included in the payload under the `SalesTransactionItems` node.
- If the step source ID is a fulfillment item, then all fulfillment items of the fulfillment order are included in the payload under the `FulfillmentTransactionItems` node.
- If a product attribute doesn't have a defined code, then the attribute is excluded from the payload.

Considerations

Keep these considerations in mind for the request payload.

- The maximum request payload size limit is 12 MB.
- The default timeout period is five seconds, and the maximum timeout period is 120 seconds.
- The encoding style for fulfillment order line items, sales transaction items, and attributes can be configured through the [Integration Definition for Standard Fulfillment Provider](#) on page 1372.

Error Handling

To verify if the callout request was successful, check the `status` value in the payload. If the status is undefined, then these HTTP codes indicate a successful response.

- 200
- 201
- 202
- 203
- 204
- 205
- 206
- 302
- 304

If the request isn't successful, then the fulfillment step state is marked as `Fatally Failed`.

Integration Definition Configurations

You can configure these additional features for the integration definition.

- Select the **Save the request and response as attachments to the record** checkbox for the integration definition to save request and response payloads as attachments to the Integration Provider Execution record. Content publish limits apply when saving request and response payloads as attachments. Use [Shield Platform Encryption](#) for secure storage of sensitive information.
- [Define Input and Output Processors for the Integration Definition](#) for the pre-processing of the standard fulfillment request before you send the request to an external system. See [Omnistudio Integration Procedures](#).

See [Create an Integration Definition](#).

[Integration Definition for Standard Fulfillment Provider](#)

Use supported attribute values of an integration definition for a Standard Fulfillment Provider to implement features as per your requirement.

Integration Definition for Standard Fulfillment Provider

Use supported attribute values of an integration definition for a Standard Fulfillment Provider to implement features as per your requirement.

The Standard Fulfillment Provider supports these attribute values.

Standard Provider

* Standard Provider ⓘ
CalloutIntegrationProvider ▼

Attribute Name <input type="text" value="Named Credentials"/>	* Attribute Value <input type="text" value="BillingSystemNC"/>
Attribute Name <input type="text" value="path"/>	* Attribute Value <input type="text" value="/delay/1"/>
Attribute Name <input type="text" value="Timeout (ms)"/>	Attribute Value <input type="text" value="10,000"/>
Attribute Name <input type="text" value="Callback URI"/>	Attribute Value <input type="text"/>
Attribute Name <input type="text" value="Input Processor"/>	Attribute Value <input type="text"/>
Attribute Name <input type="text" value="Output Processor"/>	Attribute Value <input type="text"/>
Attribute Name <input type="text" value="Item Encoding Style"/>	* Attribute Value <input type="text" value="Flat"/>
Attribute Name <input type="text" value="Attribute Encoding Style"/>	* Attribute Value <input type="text" value="Structure"/>
Attribute Name <input type="text" value="Send Empty Attributes"/>	Attribute Value <input type="checkbox"/>
Attribute Name <input type="text" value="Send Payload"/>	Attribute Value <input checked="" type="checkbox"/>

Save the request and response as attachments to the record. ⓘ

No
 Yes

Attribute Name	Description
Named Credentials	API name of the associated named credentials.
Path	Additional string that's added to the URL specified in the named credential endpoint.
Timeout (ms)	Number of milliseconds to set as a timeout parameter for the HTTP connection.
Callback URI	<p>Attribute used by a third party as the callback to process steps in case of a async callout. Additionally, this attribute also indicates these scenarios.</p> <ul style="list-style-type: none"> • The configured callout is an async callout. • If callback URI is defined, then it's included as the <code>ResponseUri</code> parameter value in the default payload for Standard Fulfillment Provider. For example, a <code>ResponseUri</code> parameter value as <code>/services/apexrest/async/callout</code>.

Attribute Name	Description
	<ul style="list-style-type: none"> The executor expects 202 response code from the remote destination. The 202 response code keeps the Fulfillment Step state as Running whereas 200 response code completes it.
Input Processor	Type_Subtype or Id of OmniProcess to process the input payload.
Output Processor	Type_Subtype or Id of OmniProcess to process the output payload.
Item Encoding Style	<p>Required.</p> <p>Encoding style for fulfillment transaction items and sales transaction items. Valid values are:</p> <ul style="list-style-type: none"> Flat—Includes a list of fulfillment transaction items and sales transaction items without any hierarchy details in the payload. Structure—Includes a list of all child line items if the step's source line item has a hierarchy of line items associated with it. <p>If item encoding style is configured as Structure on a fulfillment order line item or a sales transaction item, then the payload contains the details of the line item that the fulfillment order line item or sales transaction item is decomposed from.</p> <p>If the fulfillment order line item or sales transaction item is decomposed from the root of a bundle order line item or sales transaction item, then the payload contains the entire order line item or sales transaction item bundle structure.</p> <p>The default value is Flat.</p>
Attribute Encoding Style	<p>Required.</p> <p>Generates the payload for attributes based on the specified encoding style. Valid values are:</p> <ul style="list-style-type: none"> Flat—Includes specific details in key-value pair format that doesn't include granular details of attributes. Structure—This payload structure includes granular details of attributes. <p>The default value is Structure.</p>
Send Empty Attributes	If this checkbox is selected, the request payload includes empty attribute values wherever applicable.
Send Payload	If this checkbox is selected, a default request payload is generated to optimize processing performance. If this checkbox isn't selected, a value for the input processor is required.

Apex Type Provider

Implement custom integration logic via Apex by using the Apex Type Provider. This provider requires an Apex Integration Developer to implement a custom Apex adapter interface.

Use a custom Apex adapter to:

- Include and use integration parameters in adapter implementations such as timeouts, credentials, and path.
- Generate and transform requests and responses via Omnistudio Integration Procedures or Extract, Transform, Load (ETL) libraries.
- Enable asynchronous interaction pattern.
- Enable request and response logging by implementing a specific Apex interface.
- Handle errors, and integrate with fallout rules.

To configure the callout settings for Apex Type Provider, see [Configuration Steps](#).

Integration Adapter Implementation

Implement the `industriesintegrationfwk.ProcessIntegrationProvider` Apex interface. Use the `industriesintegrationfwk.ApexProviderAttr` class to define and access the attribute values in the integration provider definition.

```
global with sharing class DROSampleOrderAdapter implements
industriesintegrationfwk.ProcessIntegrationProvider {

    // Named credential attribute
    private static final String MOCK_CALLOUT_NAMED_CREDENTIAL =
'callout:DROOrderInterfaceNamedCred';
    private final static Integer TIMEOUT = 10000; // Request timeout in milliseconds, or
can be defined on Integration Definition as an Attribute

    private static final industriesintegrationfwk.ApexProviderAttr NAMED_CRED_ATTR = new
industriesintegrationfwk.ApexProviderAttr('Named Credential',
'Named_Credential', 'DROOrderInterfaceNamedCred', true, 'String');
    private static final industriesintegrationfwk.ApexProviderAttr ENDPOINT_ATTR = new
industriesintegrationfwk.ApexProviderAttr('Endpoint URI',
'Endpoint_URI', '/v1/orderitems/', true, 'String');

    /**
     * @param requestGuid          Request Globally Unique Identifier (GUID) provided
by the client
     * @param inputRecordId        Input Record ID – value is taken from Fulfillment
Step > Fulfillment Step Source > Source Line Item
     * @param payload              Payload to be passed to the Provider Class (empty
in DRO)
     * @param attributes           Map of configuration attributes
     * @return IntegrationCalloutResponse Response sent to the client
     */
    global static industriesintegrationfwk.IntegrationCalloutResponse executeCallout(String
requestGuid, String inputRecordId, String payload, Map<String, Object> attributes) {
        // create request
        String msgBody = '{"message\":\"Hello\",'
            + '\n\"requestGuid\":\'' + requestGuid + '\",\n'
```

```

        + '\n\"inputRecordId\":\'' + inputRecordId + '\",\n'
        + '\n\"payload\":\'' + payload + '\"]'
    ;

    String endpointUri = (String) attributes.get('Endpoint_URI');

    // Make a call
    HttpResponse response = makeCallout(endpointUri, msgBody);
    // process response and pass details to the DRO Callout Step processor by using
    IntegrationCalloutResponse(isSuccess, ResponseCode, ErrorMessage)

    industriesintegrationfwk.IntegrationCalloutResponse integrationCalloutResponse =
    handleResponse(response);

    return integrationCalloutResponse;
}

// define configurable attributes
global static List<industriesintegrationfwk.ApexProviderAttr> getProviderAttributes()
{
    List<industriesintegrationfwk.ApexProviderAttr> defaults = new
List<industriesintegrationfwk.ApexProviderAttr>();
    defaults.add(NAMED_CRED_ATTR);
    defaults.add(ENDPOINT_ATTR);
    // add any attributes such as endpoint, timeout, interface, and params
    // ...
    return defaults;
}

// Call Mock Service API.
private static HttpResponse makeCallout(String endpointUri, String msgBody) {

    // Construct the request object
    String endPoint = MOCK_CALLOUT_NAMED_CREDENTIAL + endpointUri;
    HttpRequest request = new HttpRequest();
    request.setMethod('POST');
    request.setHeader('Content-Type', 'application/json');
    request.setHeader('Accept', 'application/json');
    request.setEndpoint(endPoint);
    request.setTimeout(TIMEOUT);
    request.setBody(msgBody);

    // Send request
    HttpResponse response = new Http().send(request);
    return response;
}
}

```

Error Handling

This sample shows how to pass errors from response to orchestration via the `IntegrationResponse` interface in the Apex provider implementation. See [ProcessIntegrationProvider Interface](#).

```
public static industriesintegrationfwk.IntegrationCalloutResponse handleResponse(HttpResponse
response) {

    industriesintegrationfwk.IntegrationCalloutResponse integrationCalloutResponse;

    Map<String, Object> responseGroup = getResponseGroupAfterCallout(response);

    if(response.getStatusCode() == 200)
    {
        // SUCCESS
        integrationCalloutResponse = new
industriesintegrationfwk.IntegrationCalloutResponse(true);
        integrationCalloutResponse.setResponseCode(response.getStatusCode());

        integrationCalloutResponse.setReturnValue(responseGroup);

    }else {
        //FAILURE - pass error to DRO Fallout Handling to apply Retry Policies
        integrationCalloutResponse = new
industriesintegrationfwk.IntegrationCalloutResponse(false);
        integrationCalloutResponse.setResponseCode(response.getStatusCode());
        integrationCalloutResponse.setReturnValue(responseGroup);
        integrationCalloutResponse.setErrorMessage('Unable to process request.');
```

```
    }
    return integrationCalloutResponse;
}

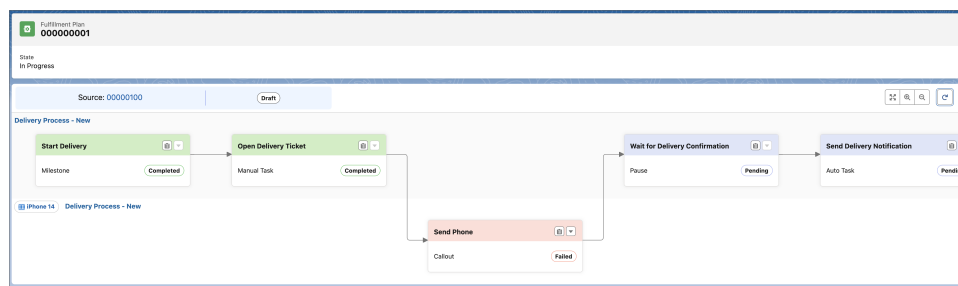
// Process Response payload
private static Map<String, Object> getResponseGroupAfterCallout(HttpResponse response)
{
    Map<String, Object> responseGroup = new Map<String, Object>();
    if (response.getStatusCode() == 200) {
        responseGroup.put('isSuccess', true);
    } else {
        responseGroup.put('isSuccess', false);
    }
    responseGroup.put('response', getResponseMap(response.getBody()));
    return responseGroup;
}

// Convert response string into Map
private static Map<String, Object> getResponseMap(String responseBody) {
    try {
        Map<String, Object> responseBodyMap = (Map<String, Object>)
JSON.deserializeUntyped(responseBody);
        return responseBodyMap;
    } catch (Exception e) {
        Map<String, Object> responseMap = new Map<String, Object>();
        responseMap.put('response', responseBody);
        return responseMap;
    }
}
```

```
}
}
```

The fulfillment step state changes to `Fatally Failed`, and the error message is saved in the `Execution Message` field.

Fulfillment Step			
Send Phone			
Fulfillment Plan	Step Type	State	Jeopardy Status
000000001	Callout	Fatally Failed	Green
Related Details			
Fields			
Information			
State	Fulfillment Step Name		
Fatally Failed	Send Phone		
Fulfillment Plan	Step Type		
000000001	Callout		
Fulfillment Step Definition	Execute On Rule		
Send Phone	Assigned To		
Flow Interview	Run As User		
Resume On Rule	Integration Persona		
Integration Definition Name	Execution Message		
DFOApexVlocMockWithDelay	Retry attempts limit exceeded default limit of 2. Unable to handle response code 408		
Retry Attempts			
2			



Apex Advanced Interface Implementation

To use advanced features such as logging, the Apex provider must implement the Apex Provider Advanced interface. You must use the `HttpBaseProvider` client for HTTP requests.

This example shows a sample of the `ProcessIntegrationProviderAdvanced` Apex interface implementation.

```
global with sharing class DFOApexVlocMockWithDelay
implements industriesintegrationfwk.ProcessIntegrationProviderAdvanced {
    ...
    global static industriesintegrationfwk.IntegrationCalloutResponse executeCallout(String
requestGuid, String inputRecordId, String payload, Map<String, Object> attributes,
industriesintegrationfwk.HttpBaseProvider httpProvider) {
    ...
    String endPoint = MOCK_CALLOUT_NAMED_CREDENTIAL + '/delay/5';
    HttpRequest request = new HttpRequest();
    request.setMethod('POST');
    request.setHeader('Content-Type', 'application/json');
    request.setHeader('Accept', 'application/json');
    request.setEndpoint(endPoint);
    request.setTimeout(TIMEOUT);
    request.setBody(msgBody);
}
```

```
// Send request
//HttpResponse response = httpProvider.httpCallout(request);
HttpResponse response = new Http().send(request);
```

Integration Definition Configuration

Select the **Save the request and response as attachments to the record** checkbox for the integration definition to save request and response payloads as attachments to the Integration Provider Execution record. Content publish limits apply when saving request and response payloads as attachments. Use [Shield Platform Encryption](#) for secure storage of sensitive information.

See [Create an Integration Definition](#).

Log Records

Integration Provider execution records are created on every request and associated with the fulfillment step. The referenced object identifier is set to order item or fulfillment order line item ID. See [IntegrationProviderExecution](#).

To view the Integration Provider execution records, configure the Fulfillment Step record page to include the Integration Provider Executions related list by using Lightning App Builder. See [Lightning App Builder](#).

The screenshot shows the Lightning App Builder interface for the Fulfillment Step record page. The main content area displays a table of Integration Provider Executions (6 records) with columns for Name, Integrations, Execution Date Time, and Status. The table is highlighted with a red dashed box. The interface also shows related lists for Dependent Step Dependencies and Integration Provider Executions.

External Services Defined Provider

Generate interface contract and Apex types by using external services and Open API compatible schema.

To configure the callout settings for External Services Defined Provider, see [Configuration Steps](#).

As an integration specialist user or admin user, perform these steps.

- Set up an external service and actions.
- In the external service definition, include integration parameters such as error codes, credentials, and path.

External Service

Use external services for outbound integrations from Salesforce by using low-code, process-based integrations to enhance your Apex integrations. See [External Services](#).

Integration Definition Configurations

You can configure these additional features for the integration definition.

- Select the **Save the request and response as attachments to the record** checkbox for the integration definition to save request and response payloads as attachments to the Integration Provider Execution record. Content publish limits apply when saving request and response payloads as attachments. Use [Shield Platform Encryption](#) for secure storage of sensitive information.
- [Define Input and Output Processors for the Integration Definition](#) for the pre-processing of the standard fulfillment request before you send the request to an external system. See [Omnistudio Integration Procedures](#).

See [Create an Integration Definition](#).

Step Definition

Set the created integration definition on the Step Definition record with `Callout` as the step type.

Asynchronous Interaction Pattern

To specify an asynchronous request, you must add the callback URI to the integration definition for Standard Fulfillment Provider or Apex Type Provider as an optional attribute.

Standard Fulfillment Provider

- Provide the callback URI in the integration definition to accept the callback.
- Use these steps to set up the async callout.
 - • Use the `ResponseUri` key to retrieve the Callback URI value from the payload.
 - Use the `StepId` key to retrieve the Fulfillment Step value from the payload. If order item ID is returned instead of Fulfillment Step ID, use `CorrelationId` key to extract the value of the step ID. For example, `callout:13Wxx0000004CAf:`.
 - Pass the StepId value to the callback URI endpoint. Return 202 response code to ensure the Fulfillment Step is in `Running` state. Otherwise, the 200 response code completes the step.

Here's a sample payload.

```
{
  "ResponseUri": "/services/apexrest/async/callout",
  "StepId": "802xx000001nb1MAAQ",
  "CorrelationId": "callout:13Wxx0000004CAf:",
  ...//Other values
}
```

- Extract the step ID from the request. Find the Fulfillment Step ID in the org by using the extracted step ID and update the Fulfillment Step state to `Completed`.

Apex Type Provider

- Provide the callback URI in the integration definition to accept the callback.
- Set up the async callout by using Apex Type Provider.

- Create an Apex class that implements the `ProcessIntegrationProvider` interface.

Here's a sample that shows the addition of a callback URL to the provider attribute for Apex Type Provider.

```
global with sharing class DFOAsyncApexSample implements
industriesintegrationfwk.ProcessIntegrationProvider {

    private static final industriesintegrationfwk.ApexProviderAttr NAMED_CRED_ATTR
    =
        new industriesintegrationfwk.ApexProviderAttr('Named Credential',
            'Named_Credential', 'DFOCalloutMockCreds', true, 'String');

    private static final industriesintegrationfwk.ApexProviderAttr CALLBACK_URL_ATTR
    =
        new industriesintegrationfwk.ApexProviderAttr('Callback URL',
            'Callback_URL', 'DFOCallbackUrl', true, 'String');

    global static List<industriesintegrationfwk.ApexProviderAttr>
    getProviderAttributes() {
        List<industriesintegrationfwk.ApexProviderAttr> defaults = new
List<industriesintegrationfwk.ApexProviderAttr>();
        defaults.add(NAMED_CRED_ATTR);
        defaults.add(CALLBACK_URL_ATTR);

        return defaults;
    }
}
```

- Specify the Fulfillment Step ID as the value of the `requestGuid` parameter of the `executeCallout` method. You can also extract the Step ID from the `CorrelationId` key value. For example, "callout:13Wxx0000004CAf:". Here's a sample payload that assigns the provider attribute values.

```
public interface ProcessIntegrationProvider {
    IntegrationCalloutResponse executeCallout(String requestGuid,
        String inputRecordId, String payload, Map<String, Object> attributes);

    List<ProviderAttr> getProviderAttributes();
}
```

- Set response code to 202 to indicate that the callout is asynchronously executed and in `Processing` state.

Here's a sample payload that sets the response code.

```
global with sharing class DFOAsyncApexSample implements
industriesintegrationfwk.ProcessIntegrationProvider {
    ...
    IntegrationCalloutResponse executeCallout(String requestGuid,
        String inputRecordId, String payload, Map<String, Object> attributes){
        // execute http request
        ...
        // set accepted if no failures
        IntegrationCalloutResponse acceptedResponse =
            new IntegrationCalloutResponse(true);
        acceptedResponse.setResponseCode(202);

        return new IntegrationCalloutResponse();
    }
}
```

```
}
}
```

- The callback URL is visible in the integration definition.

Integration Definitions > DFOApexAdapterMockInterface

Apex Class

* Apex Class

Attribute Name: Named Credential *Attribute Value

Attribute Name: Callback URL *Attribute Value

- Extract the step ID from the request. Find the Fulfillment Step ID in the org by using the extracted step ID and update the Fulfillment Step state to Completed.

```
FulfillmentStep step = new FulfillmentStep(id = 'stepId', State = 'Completed');
upsert step;
```

Input and Output Transformation Processors

Use input and output processors to process a standard fulfillment request before sending it to an external system.

Prerequisites

- Omnistudio license is required.
- Omnistudio Admin permission set license is assigned to Integration Configuration User (Fulfillment Designer).
- The input and output procedure attributes of an integration definition, which are available from Setup, are assigned with the Omnistudio Integration Procedure request and response. You can use `Type_Subtype` or `Id` of `OmniProcess` as the values for attributes.

When a callout step is executed, these steps are followed.

- The defined integration procedures are identified for request and response handling from an integration definition.
- The input processor generates the request by using `Fulfillment Step Source > SourceIdentifier` as the `InputRecordId` input parameter value. For example, the ID of an order item.
- The output processor handles the response by passing a map to the Integration Procedure service. The results from the Integration Procedure are used to identify any errors and details are passed to Dynamic Revenue Orchestrator.

CHAPTER 9 Usage Management

In this chapter ...

- [Usage Management Standard Objects](#)
- [Usage Management Fields on Standard Objects](#)
- [Usage Management Standard Invocable Actions](#)
- [Usage Management Business APIs](#)
- [Usage Management Metadata API Types](#)

Provide transparent, accurate, and efficient management of usage data and estimated usage amount to enhance revenue management capabilities.

EDITIONS

Available in: Lightning Experience

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

Usage Management Standard Objects

The Usage Management data model provides objects and fields to set up and manage consumption of usage-based products.

[ProductUsageGrant](#)

Represents the details of a grant associated with a resource, product, or service, such as the purchased quantity, renewal and rollover policy, and validity of the grant. This object is available in API version 62.0 and later.

[ProductUsageResource](#)

Represents the mapping of a product and its usage resources. This object is available in API version 64.0 and later.

[ProductUsageResourcePolicy](#)

Represents the policies applicable to the usage resource when it's associated with a sellable product. These policies are derived from the parent usage resource and can be overridden when setting up usage modeling. This object is available in API version 65 and later.

[TransactionUsageEntitlement](#)

Represents the details of each usage entitlement that's granted with the purchased sellable product, such as quantity and date when the entitlements were granted. This object is available in API version 63.0 and later.

[UnitOfMeasure](#)

Defines the units and systems of units used to account for quantities of a usage resource. This object is available for usage management in API version 62.0 and later.

[UnitOfMeasureClass](#)

Represents a standard unit of measure dimension. This object is available in API version 63.0 and later.

[UsageBillingPeriodItem](#)

Represents the calculated overages for the usage entitlement and the amount that's charged for these overages. This object is available in API version 63.0 and later.

[UsageCmtAssetRelatedObj](#)

Represents the relation between an asset for the commitment-based usage product and an asset, account, contract, or custom object. This object is available in API version 64.0 and later.

[UsageCommitmentPolicy](#)

Represents the set of rules that determines how commitments are applied to a usage resource. This object is available in API version 65 and later.

[UsageEntitlementAccount](#)

Represents the entitlement account details related to the asset that holds the wallet with the granted units. This object is available in API version 63.0 and later.

[UsageEntitlementBucket](#)

Represents a usage entitlement that's granted with the sellable product. This object is available in API version 63.0 and later.

[UsageEntitlementEntry](#)

Represents the usage entitlement details, such as the usage consumption, rollovers, and details of expired units for each tenure. This object is available in API version 63.0 and later.

[UsageGrantRenewalPolicy](#)

Represents a policy about the rollover of a usage grant. This object is available in API version 62.0 and later.

[UsageGrantRolloverPolicy](#)

Represents a policy about the rollover of a usage grant. This object is available in API version 62.0 and later.

[UsageOveragePolicy](#)

Represents the set of rules that determine the management of usage resource's units consumed beyond the granted limit. This object is available in API version 65 and later.

[UsagePrdGrantBindingPolicy](#)

Represents the association of a usage resource's grants with a sellable product. This object is available in API version 63.0 and later.

[UsageRatableSummary](#)

Represents the aggregation of the usage summaries that are used to calculate the rate at which the overages are charged. This object is available in API version 63.0 and later.

[UsageRatableSumCmtAssetRt](#)

Represents the rate that's calculated and applicable for the usage resource associated with the commitment assets related to an anchor. This object is available in API version 65.0 and later.

[UsageResource](#)

Represents an entitlement granted to a user or party by a provider, such as data storage, computing power, bandwidth, or any other product or service. Additionally, this object is used to represent resources consumed over time. This object is available in API version 62.0 and later.

[UsageResourcePolicy](#)

Represents the policies applicable to the usage resource whether it's associated with a sellable product or not. This object is available in API version 65 and later.

[UsageResourceBillingPolicy](#)

Represents information about how the usage is accumulated before rating a usage resource. This object is available in API version 62.0 and later.

[UsageSummary](#)

Represents the aggregation of the entries in the transaction journal for a usage entitlement for a specified period. This object is available in API version 63.0 and later.

SEE ALSO:

[Object Reference for the Salesforce Platform: Overview of Salesforce Objects and Fields](#)

[SOAP API Developer Guide: Introduction to SOAP API](#)

ProductUsageGrant

Represents the details of a grant associated with a resource, product, or service, such as the purchased quantity, renewal and rollover policy, and validity of the grant. 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

To create, update, and delete product usage grant records, you must have the Usage Management Design Time permission set license.

Fields

Field	Details
DrawdownOrder	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The order that's used to debit entitlement consumption from the usage entitlement bucket.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • ExpiringFirst • GrantedFirst • GrantedLast <p>This field is deprecated and will be retired in a future version.</p>
EffectiveEndDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time until when the grant remains effective.</p>
EffectiveStartDate	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The date and time when the grant becomes effective.</p>
Label	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The identifying label for the product usage grant.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	<p>Description The date when this record was last referenced.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
OverageChargeable	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies whether to charge for overages. Valid values are:</p> <ul style="list-style-type: none"> No Yes <p>This field is deprecated and will be retired in a future version.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the owner of the product usage grant. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
ProductOfferId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The sellable product that grants the usage resource. This field is a relationship field. Available in API versions 62.0 and 63.0.</p>

Field	Details
	<p>Relationship Name ProductOffer</p> <p>Refers To Product2</p>
ProductSellingModelId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The product selling model associated with the product usage grant. This field is available in API version 65.0 and later. This field is a relationship field.</p> <p>Relationship Name ProductSellingModel</p> <p>Refers To ProductSellingModel</p>
ProductUsageGrantNum	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The number of each resource grant map that starts with one and is consecutive.</p>
ProductUsageResourceId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The product usage resource associated with the product usage grant. Available in API version 64.0 and later. This field is a relationship field.</p> <p>Relationship Name ProductUsageResource</p> <p>Refers To ProductUsageResource</p>
Quantity	<p>Type double</p>

Field	Details
	<p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The quantity of the granted resource.</p>
RenewalPolicyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The grant renewal policy associated with the product usage grant. This field is a relationship field.</p> <p>Relationship Name RenewalPolicy</p> <p>Refers To UsageGrantRenewalPolicy</p>
RolloverPolicyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The grant rollover policy associated with the product usage grant. This field is a relationship field.</p> <p>Relationship Name RolloverPolicy</p> <p>Refers To UsageGrantRolloverPolicy</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The status of the product usage grant. Valid values are:</p> <ul style="list-style-type: none">• Active• Draft• Inactive

Field	Details
Type	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The type of model that defines how the usage resource is consumed. Valid values are:</p> <ul style="list-style-type: none"> • Commit • Grant <p>The default value is <code>Grant</code>. Available in API version 64.0 and later.</p>
UnitOfMeasureClassId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The unit of measure class associated with the product usage grant. This field is a relationship field.</p> <p>Relationship Name UnitOfMeasureClass</p> <p>Refers To UnitOfMeasureClass</p>
UnitOfMeasureId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The unit for measure associated with the product usage grant. This value when specified, overrides the default unit of measure defined in the associated unit of measure class. This field is a relationship field.</p> <p>Relationship Name UnitOfMeasure</p> <p>Refers To UnitOfMeasure</p>
UsageDefinitionProductId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The sellable product associated with the usage resource that's used to retrieve tax policy, calculate rating during overages, and other invoicing actions.</p> <p>This field is a relationship field.</p> <p>Relationship Name UsageDefinitionProduct</p> <p>Refers To Product2</p>
UsageModelType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The ID of the unit of measure associated with the product. The type of usage model for a product or service. <code>Anchor</code> is the main subscription product or service. <code>Pack</code> is the add-on product or service that grants additional usage resources for consumption. <code>Commit</code> is the product or service with a specific committed quantity of consumption.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • <code>Anchor</code> • <code>Pack</code> • <code>Token Commitment</code> • <code>Quantity Commitment</code> • <code>Monetary Commitment</code> <p>This field is available in API version 65.0 and later.</p>
UsageResourceId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The usage resource associated with the product usage grant.</p> <p>This field is a relationship field. This field is deprecated and will be retired in a future version.</p> <p>Relationship Name UsageResource</p> <p>Refers To UsageResource</p>

Field	Details
ValidityPeriodTerm	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The period until when the resource grant is valid.</p>
ValidityPeriodUnit	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The length of a validity period for the resource grant, when used with the <code>ValidityPeriodTerm</code> field.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • Month • None • Year

Associated Objects

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

ProductUsageGrantHistory

History is available for tracked fields of the object.

ProductUsageGrantOwnerSharingRule

Sharing rules are available for the object.

ProductUsageGrantShare

Sharing is available for the object.

ProductUsageResource

Represents the mapping of a product and its usage resources. This object is available in API version 64.0 and later.

Supported Calls

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

Special Access Rules

Fields

Field	Details
EffectiveEndDate	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the relationship between the product and the usage resource stops being active, and any usage tracking or billing related to this relationship ends.</p>
EffectiveStartDate	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The date and time when the relationship between the product and the usage resource becomes active or effective, and any usage tracking or billing related to this relationship begins.</p>
IsOptional	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the product usage resource is optional when the associated product is one of the commitment usage model types (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>. This field is available in API version 65.0 and later.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date when this record was last referenced.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	<p>Description The timestamp for when the current user last viewed a record related to this record.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the owner of the product usage grant. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
ProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The sellable product that grants the usage resource. This field is a relationship field.</p> <p>Relationship Name ProductOffer</p> <p>Refers To Product2</p>
ProductUsageResourceNum	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The number of each resource grant map that starts with one and is consecutive.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The status of the product usage resource record. Valid values are:</p>

Field	Details
	<ul style="list-style-type: none"> • Active • Draft • Inactive
TokenResourceId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The usage resource of category <code>Token</code> that's associated with the selected usage resource. This field is available in API version 65.0 and later. This field is a relationship field.</p> <p>Relationship Name TokenResource</p> <p>Refers To UsageResource</p>
UsageResourceId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The usage resource associated with the product usage grant. This field is a relationship field.</p> <p>Relationship Name UsageResource</p> <p>Refers To UsageResource</p>

Associated Objects

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

ProductUsageResourceChangeEvent

Change events are available for the object.

ProductUsageResourceFeed

Feed tracking is available for the object.

ProductUsageResourceHistory


History is available for tracked fields of the object.

ProductUsageResourceShare

Sharing is available for the object.

ProductUsageResourcePolicy

Represents the policies applicable to the usage resource when it's associated with a sellable product. These policies are derived from the parent usage resource and can be overridden when setting up usage modeling. This object is available in API version 65 and later.

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

Supported Calls

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

Fields

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Date and time when the current user last viewed or modified this record, a record related to this record, or a list view.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Date and time when the current user last viewed or modified this record.</p>
ProductSellingModelId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The product selling model associated with this policy. This field is a relationship field.</p> <p>Relationship Name ProductSellingModel</p>

Field	Details
	<p>Refers To ProductSellingModel</p>
ProductUsageResourceId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The product usage resource associated with this policy. This field is a relationship field.</p> <p>Relationship Name ProductUsageResource</p> <p>Relationship Type Master-detail</p> <p>Refers To ProductUsageResource (the master object)</p>
RatingFrequencyPolicyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The rating frequency policy associated with the usage resource. This field is a relationship field.</p> <p>Relationship Name RatingFrequencyPolicy</p> <p>Refers To RatingFrequencyPolicy</p>
UsageAggregationPolicyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The usage aggregation policy associated with the usage resource. This field is a relationship field.</p> <p>Relationship Name UsageAggregationPolicy</p> <p>Refers To UsageResourceBillingPolicy</p>

Field	Details
UsageCommitmentPolicyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The usage commitment policy associated with the usage resource. This field is a relationship field.</p> <p>Relationship Name UsageCommitmentPolicy</p> <p>Refers To UsageCommitmentPolicy</p>
UsageOveragePolicyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The usage overage policy associated with the usage resource. This field is a relationship field.</p> <p>Relationship Name UsageOveragePolicy</p> <p>Refers To UsageOveragePolicy</p>

TransactionUsageEntitlement

Represents the details of each usage entitlement that's granted with the purchased sellable product, such as quantity and date when the entitlements were granted. 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

To create, update, and delete transaction usage entitlement records, you must have the Usage Management Run Time permission set license.

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The account that's associated with the usage entitlement. This field is a relationship field.</p> <p>Relationship Name Account</p> <p>Refers To Account</p>
ActionType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The type of action that resulted in the transaction usage entitlement. Valid values are:</p> <ul style="list-style-type: none">• Amend• Cancellation• New• Ramp• Renewal
AssetId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The asset associated with the sellable product. This field is a relationship field.</p> <p>Relationship Name Asset</p> <p>Refers To Asset</p>

Field	Details
ChargeForOverage	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The action to be taken when the entitlements are used beyond their grant values. Valid values are:</p> <ul style="list-style-type: none"> • No—Don't charge for over consumption • Yes—Charge for over consumption
DrawdownOrder	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The order that's used to debit entitlement consumption from the usage entitlement bucket. Valid values are:</p> <ul style="list-style-type: none"> • ExpiringFirst • GrantedFirst • GrantedLast
EffectiveEndDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the active transaction usage entitlement ends.</p>
EffectiveStartDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The date and time when the transaction usage entitlement becomes active.</p>
EntitlementQuantity	<p>Type double</p> <p>Properties Create, Filter, Sort, Update</p>

Field	Details
	<p>Description</p> <p>The entitlement quantity for the usage resource.</p>
EntitlementProcessingStatus	<p>Type</p> <p>picklist</p> <p>Properties</p> <p>Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description</p> <p>Indicates whether the transaction usage entitlement has been processed by entitlement service to be used in Billing. Available in API version 65.0 and later.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • PENDING—Pending • PROCESSED—Processed <p>The default value is PENDING.</p>
EntitlementUomClassId	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Filter, Group, Nillable, Sort</p> <p>Description</p> <p>The unit of measure class for the usage entitlement.</p> <p>This field is a relationship field.</p> <p>Relationship Name</p> <p>EntitlementUomClass</p> <p>Refers To</p> <p>UnitOfMeasureClass</p>
EntitlementUomId	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Create, Filter, Group, Sort, Update</p> <p>Description</p> <p>The unit of measure to calculate the usage entitlement.</p> <p>This field is a relationship field.</p> <p>Relationship Name</p> <p>EntitlementUom</p> <p>Refers To</p> <p>UnitOfMeasure</p>

Field	Details
ExternalOrderItem	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The custom or external order item that's associated with the entitlement.</p>
GrantBindingTargetId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The target associated with the entitlements that are granted with the sellable product. This field is a relationship field.</p> <p>Relationship Name GrantBindingTarget</p> <p>Refers To Account, Asset, BindingObjectCustomExt, Contract</p>
GrantType	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies the type of model that defines how the usage resource is consumed. Available in API version 65.0 and later. Possible values are:</p> <ul style="list-style-type: none"> • Commit • Grant <p>The default value is Grant.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date when this record was last referenced.</p>
LastViewedDate	<p>Type dateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Autogenerated identifier for the transaction usage entitlement record.</p>
NetQuantity	<p>Type double</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The total quantity that combines the amended quantity with the initial transaction quantity in the order item.</p>
OrderItemId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The order item that's associated with the entitlement. This field is a polymorphic relationship field.</p> <p>Relationship Name OrderItem</p> <p>Refers To OrderItem, WorkOrderLineItem</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the owner of the transaction usage entitlement. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p>

Field	Details
	<p>Refers To Group, User</p>
PricebookEntryId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The price book entry that's associated with the sellable product. This field is a relationship field.</p> <p>Relationship Name PricebookEntry</p> <p>Refers To PricebookEntry</p>
ProductId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The sellable product for which the entitlement is granted. This field is a relationship field.</p> <p>Relationship Name Product</p> <p>Refers To Product2</p>
RatingFrequencyPolicyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The sellable product for which the entitlement is granted. Available in API version 64.0 and later. This field is deprecated and will be retired in a future version. This field is a relationship field.</p> <p>Relationship Name RatingFrequencyPolicy</p> <p>Refers To RatingFrequencyPolicy</p>

Field	Details
TokenResourceId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The usage resource of category Token associated with the usage resource related to the usage product added in the quote line item. Available in API version 65.0 and later. This field is a relationship field.</p> <p>Relationship Name TokenResource</p> <p>Refers To UsageResource</p>
TransactionQuantity	<p>Type double</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The transaction quantity in the order for the usage entitlement.</p>
UsageAggregationPolicyId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The usage aggregation policy for this entitlement. This field is deprecated and will be retired in a future version. This field is a relationship field.</p> <p>Relationship Name UsageAggregationPolicy</p> <p>Refers To UsageResourceBillingPolicy</p>
UsageGrantRefreshPolicyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The usage grant refresh policy that's associated with the transaction usage entitlement. This field is a relationship field.</p>

Field	Details
	<p>Relationship Name UsageGrantRefreshPolicy</p> <p>Refers To UsageGrantRenewalPolicy</p>
UsageGrantRolloverPolicyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The usage grant rollover policy that's associated with the transaction usage entitlement. This field is a relationship field.</p> <p>Relationship Name UsageGrantRolloverPolicy</p> <p>Refers To UsageGrantRolloverPolicy</p>
UsageModelType	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description The type of usage model for a product or service. <code>Anchor</code> is the main subscription product or service. <code>Pack</code> is the add-on product or service that grants additional usage resources for consumption. <code>Commit</code> is the product or service with a specific committed quantity of consumption. Valid values are:</p> <ul style="list-style-type: none"> • <code>Anchor</code> • <code>Monetary Commitment</code> • <code>Pack</code> • <code>Quantity Commitment</code> • <code>Token Commitment</code> <p>Available in API version 64.0 and later.</p>
UsageResourceId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The usage resource record that's associated with the transaction usage entitlement.</p>

Field	Details
	<p>This field is a relationship field.</p> <p>Relationship Name UsageResource</p> <p>Refers To UsageResource</p>
ValidityPeriodTerm	<p>Type int</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The duration for which the usage resource grant is valid, when used with the validity period units.</p>
ValidityPeriodUnit	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The length of a validity period for the usage resource grant, when used with the validity period term. Valid values are:</p> <ul style="list-style-type: none"> • Month • None • Year

Associated Objects

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

[TransactionUsageEntitlementHistory](#)

History is available for tracked fields of the object.

[TransactionUsageEntitlementOwnerSharingRule](#)

Sharing rules are available for the object.

[TransactionUsageEntitlementShare](#)

Sharing is available for the object.

UnitOfMeasure

Defines the units and systems of units used to account for quantities of a usage resource. This object is available for usage management in API version 62.0 and later.

Examples of units of measure include Liter (for volume), Kilogram (for weight), and single units (such as Can, sachet, and packet).

Supported Calls

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

Fields

Field	Details
<code>ConversionFactor</code>	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The factor or rate that's used to convert this unit of measurement to the base unit.</p>
<code>LastReferencedDate</code>	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date when this record was last referenced.</p>
<code>LastViewedDate</code>	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
<code>Name</code>	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Autogenerated identifier for the unit of measure record.</p>
<code>OwnerId</code>	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description The ID of the owner of the unit of measure record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
Sequence	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The sequence number assigned to the unit of measure.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The status of the unit of measure. Valid values are:</p> <ul style="list-style-type: none"> • Active • Draft • Inactive
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The type of the unit of measure. For example, weight, distance, period.</p>
UnitCode	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The code for the unit of measure.</p>

Field	Details
UnitOfMeasureClassId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The unit of measure class associated with the unit of measure. This field is a relationship field.</p> <p>Relationship Name UnitOfMeasureClass</p> <p>Refers To UnitOfMeasureClass</p>

Associated Objects

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

UnitOfMeasureChangeEvent

Change events are available for the object.

UnitOfMeasureShare

Sharing is available for the object.

UnitOfMeasureClass

Represents a standard unit of measure dimension. 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
BaseUnitOfMeasureId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The base unit of measure that's used to calculate and display quantities. This field is a relationship field.</p>

Field	Details
	<p>Relationship Name BaseUnitOfMeasure</p> <p>Refers To UnitOfMeasure</p>
Code	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The unique user-defined string for the unit of measure class.</p>
DefaultUnitOfMeasureId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The default unit of measure that's used to calculate and display quantities. This measure can be different from the base unit of measure and overridden by individual resources. This field is a relationship field.</p> <p>Relationship Name DefaultUnitOfMeasure</p> <p>Refers To UnitOfMeasure</p>
Description	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The description of the unit of measure class.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date when this record was last referenced.</p>
LastViewedDate	<p>Type dateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Autogenerated identifier for the unit of measure class record.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The status of the unit of measure class. Valid values are:</p> <ul style="list-style-type: none"> • Active • Draft • Inactive
Type	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The type of the unit of measure class. Valid values are:</p> <ul style="list-style-type: none"> • Currency • Token • Usage <p>The default value is <code>Usage</code>. Available in API version 64.0 and later. This is a required field.</p>

Associated Objects

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

UnitOfMeasureClassHistory

History is available for tracked fields of the object.

UsageBillingPeriodItem

Represents the calculated overages for the usage entitlement and the amount that's charged for these overages. 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

To create, update, and delete transaction usage entitlement records, you must have the Usage Management Run Time permission set license.

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The account that's associated with the billing period item. This field is a relationship field.</p> <p>Relationship Name Account</p> <p>Refers To Account</p>
AssetId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The asset that's associated with the usage billing period item. This field is a relationship field.</p> <p>Relationship Name Asset</p>

Field	Details
	<p>Refers To Asset</p>
EndDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The end date and time of the billing period.</p>
ErrorCode	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The error code when the billing request fails. Valid value is:</p> <ul style="list-style-type: none"> INTERNAL_ERROR
ErrorDescription	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The error description that corresponds to the error code.</p>
GrantBindingTargetId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The record that's associated with the usage entitlement account. This field is a relationship field.</p> <p>Relationship Name GrantBindingTarget</p> <p>Refers To Account, Asset, BindingObjectCustomExt, Contract</p>
LastReferencedDate	<p>Type dateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The date when this record was last referenced.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
OverageAmount	<p>Type currency</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The amount calculated for the overage.</p>
OverageAmountDerived	<p>Type double</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The numeric value specified in the <code>OverageAmount</code> field to process Data processing Engine (DPE) jobs. This field is a calculated field.</p>
OverageQuantity	<p>Type double</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The quantity of the usage entitlement that was overused for the specified billing period.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the owner of the usage billing period item.</p>

Field	Details
	<p>This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
StartDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The start date and time of the billing period.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The status of the usage billing period item. Valid values are:</p> <ul style="list-style-type: none"> • Invoiced • InvoicingFailed • LiableSummaryComplete • New • ReadyForInvoicing • Inactive—Available in API version 65.0 and later.
TotalUsedQuantity	<p>Type double</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The total quantity of usage entitlement that was used for the billing period. This includes granted and overused entitlements.</p>
UoMId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The unit of measure for the overage quantity of usage entitlement.</p>

Field	Details
	<p>This field is a relationship field.</p> <p>Relationship Name UoM</p> <p>Refers To UnitOfMeasure</p>
UsageBillingPeriodItemNum	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Autogenerated identifier for the usage billing period item record.</p>
UsageEntitlementAccountId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The usage entitlement account associated with the source usage entitlement bucket. This field is a relationship field.</p> <p>Relationship Name UsageEntitlementAccount</p> <p>Refers To UsageEntitlementAccount</p>
UsageEntitlementBucketId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The usage entitlement bucket that's associated with the billing period item. This field is a relationship field.</p> <p>Relationship Name UsageEntitlementBucket</p> <p>Refers To UsageEntitlementBucket</p>
UsageResourceId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p>

Field	Details
	<p>Description</p> <p>The usage resource associated with the usage entitlement bucket.</p> <p>This field is a relationship field.</p> <p>Relationship Name</p> <p>UsageResource</p> <p>Refers To</p> <p>UsageResource</p>

Associated Objects

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

UsageBillingPeriodItemFeed

Feed tracking is available for the object.

UsageBillingPeriodItemHistory


History is available for tracked fields of the object.

UsageBillingPeriodItemShare

Sharing is available for the object.

UsageCmtAssetRelatedObj

Represents the relation between an asset for the commitment-based usage product and an asset, account, contract, or custom object. This object is available in API version 64.0 and later.

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

Supported Calls

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

Fields

Field	Details
AssetId	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Create, Filter, Group, Sort</p> <p>Description</p> <p>The asset associated with the commitment-based usage product.</p>

Field	Details
	<p>This field is a relationship field.</p> <p>Relationship Name Asset</p> <p>Relationship Type Master-detail</p> <p>Refers To Asset (the master object)</p>
EffectiveEndDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time until when the commitment for the related asset remains effective.</p>
EffectiveStartDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The date and time when the commitment for the related asset becomes effective.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date when this record was last referenced.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p>

Field	Details
	<p>Description</p> <p>Autogenerated identifier for the usage commitment asset related object record.</p>
RelatedObjectId	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Create, Filter, Group, Sort, Update</p> <p>Description</p> <p>The asset, account, or contract associated with the asset.</p> <p>This field is a polymorphic relationship field.</p> <p>Relationship Name</p> <p>RelatedObject</p> <p>Refers To</p> <p>Account, Asset, Contract</p> <p>Only Asset is supported in API version 64.0.</p>

Associated Objects

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

[UsageCmtAssetRelatedObjFeed](#)

Feed tracking is available for the object.

[UsageCmtAssetRelatedObjHistory](#)

History is available for tracked fields of the object.

UsageCommitmentPolicy

Represents the set of rules that determines how commitments are applied to a usage resource. This object is available in API version 65 and later.

Supported Calls

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

Special Access Rules

Fields

Field	Details
CommitmentRate	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The rate that's applicable to the usage resource's units consumed post the commitment is utilized, but the commitment period is still active.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • Bounded Object Rate • Lowest Commitment Rate <p>The default value is <code>Lowest Commitment Rate</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Date and time when the current user last viewed or modified this record, a record related to this record, or a list view.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Date and time when the current user last viewed or modified this record.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the usage commitment policy.</p>

UsageEntitlementAccount

Represents the entitlement account details related to the asset that holds the wallet with the granted units. This object is available in API version 63.0 and later.

Supported Calls

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

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The account that's associated with the usage entitlement. This field is a relationship field.</p> <p>Relationship Name Account</p> <p>Refers To Account</p>
BillDayOfMonth	<p>Type int</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The day of the month that the bill is generated on and that ends the billing period.</p>
BillingPeriodEndDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The date and time when the billing period of the usage entitlements ends.</p>
BillingPeriodStartDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p>

Field	Details
	<p>Description The date and time when the billing period of the usage entitlements starts.</p>
BillingPeriodTerm	<p>Type int</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The frequency at which the bill is generated.</p>
BillingPeriodUnit	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The unit to measure the billing frequency. Valid value is:</p> <ul style="list-style-type: none"> • MONTH
EffectiveEndDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the usage entitlement account ends.</p>
EffectiveStartDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The date and time when the usage entitlement account starts.</p>
GrantBindingTargetId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The target that's associated with the usage entitlement account. This field is a relationship field.</p>

Field	Details
	<p>Relationship Name GrantBindingTarget</p> <p>Refers To Account, Asset, BindingObjectCustomExt, Contract</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date when this record was last referenced.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Autogenerated identifier for the usage entitlement account record.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the owner of the usage entitlement account. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
PricebookEntryId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The price book entry that's associated with the sellable product. This field is a relationship field.</p> <p>Relationship Name PricebookEntry</p> <p>Refers To PricebookEntry</p>
ProductId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The sellable product for which the entitlements are granted. This field is a relationship field.</p> <p>Relationship Name Product</p> <p>Refers To Product2</p>

Associated Objects

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

[UsageEntitlementAccountFeed](#)

Feed tracking is available for the object.

[UsageEntitlementAccountHistory](#)

History is available for tracked fields of the object.

[UsageEntitlementAccountShare](#)

Sharing is available for the object.

UsageEntitlementBucket

Represents a usage entitlement that's granted with the sellable 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
BucketBalance	<p>Type double</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The balance of the usage entitlement bucket after each transaction.</p>
BucketBalanceUomId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The unit that's used to measure the usage entitlement bucket balance. This field is a relationship field.</p> <p>Relationship Name BucketBalanceUom</p> <p>Refers To UnitOfMeasure</p>
CompletedRollovers	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The number of rollovers that were completed for the entitlements.</p>
ConsumedEntitlement	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The entitlements that have been consumed from this bucket.</p>
EffectiveEndDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the usage entitlement bucket period ends.</p>

Field	Details
EffectiveStartDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The date and time when the usage entitlement bucket becomes effective.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date when this record was last referenced.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Autogenerated identifier for the usage entitlement bucket record.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the owner of the usage entitlement bucket. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>

Field	Details
ParentId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The parent record that's associated with the usage entitlement bucket. This field is a polymorphic relationship field.</p> <p>Relationship Name Parent</p> <p>Refers To UsageEntitlementAccount, UsageEntitlementBucket</p>
TotalAsOfBalance	<p>Type double</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The balance of the entitlements granted with the usage resource for a Usage entitlement account.</p>
TotalConsumedEntitlement	<p>Type double</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The entitlements that have been consumed from this bucket.</p>
TransactionUsageEntitlementId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The transaction usage entitlement associated with this usage entitlement bucket. This field is a relationship field.</p> <p>Relationship Name TransactionUsageEntitlement</p> <p>Refers To TransactionUsageEntitlement</p>
UsageResourceId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The usage resource that's associated with the usage entitlement bucket. This field is a relationship field.</p> <p>Relationship Name UsageResource</p> <p>Refers To UsageResource</p>

Associated Objects

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

UsageEntitlementBucketFeed

Feed tracking is available for the object.

UsageEntitlementBucketHistory


History is available for tracked fields of the object.

UsageEntitlementBucketShare

Sharing is available for the object.

UsageEntitlementEntry

Represents the usage entitlement details, such as the usage consumption, rollovers, and details of expired units for each tenure. This object is available in API version 63.0 and later.

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

Supported Calls

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

Fields

Field	Details
ClosingBalance	<p>Type double</p> <p>Properties Create, Filter, Sort, Update</p>

Field	Details
	<p>Description The quantity of the entitlement after adjusting the transaction quantity for the current entitlement validity period.</p>
EffectiveEndDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the usage entitlement entry ends.</p>
EffectiveStartDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The date and time when the usage entitlement entry starts.</p>
EntitlementBucketId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The usage entitlement bucket that's associated with the entitlement entry. This field is a relationship field.</p> <p>Relationship Name EntitlementBucket</p> <p>Relationship Type Master-detail</p> <p>Refers To UsageEntitlementBucket (the master object)</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date when this record was last referenced.</p>
LastViewedDate	<p>Type dateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Autogenerated identifier for the usage entitlement entry record.</p>
OpeningBalance	<p>Type double</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The starting quantity of the entitlement for the current entitlement validity period.</p>
ParentEntitlementBucketId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The parent usage entitlement bucket record that's associated with the entitlement entry. This field is a relationship field.</p> <p>Relationship Name ParentEntitlementBucket</p> <p>Refers To UsageEntitlementBucket</p>
TransactionDate	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The date when the transaction usage entitlement entry was updated.</p>
TransactionQuantity	<p>Type double</p>

Field	Details
	<p>Properties Create, Filter, Sort, Update</p> <p>Description The quantity of the entitlement used during the current entitlement validity period.</p>
TransactionReason	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The reason for the usage entitlement entry. Valid values are:</p> <ul style="list-style-type: none"> • Amend • Cancel • Consumption • Original • Refresh • Renew • Rollover
TransactionType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The type of transaction. Valid values are:</p> <ul style="list-style-type: none"> • Credit • Debit • Expired
TransactionUsageEntitlementId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The transaction usage entitlement that's associated with this usage entitlement entry. This field is a relationship field.</p> <p>Relationship Name TransactionUsageEntitlement</p>

Field	Details
	<p>Refers To TransactionUsageEntitlement</p>
TransactionalBucketId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The usage entitlement bucket that's used to debit the consumption of entitlements. This field is a relationship field.</p> <p>Relationship Name TransactionalBucket</p> <p>Refers To UsageEntitlementBucket</p>
UomId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The unit of measure that's associated with the usage entitlement. This field is a relationship field.</p> <p>Relationship Name Uom</p> <p>Refers To UnitOfMeasure</p>
UsageSummaryId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The usage summary that's associated with the usage entitlement. Available in API version 64.0 and later. This field is a relationship field.</p> <p>Relationship Name UsageSummary</p> <p>Refers To UsageSummary</p>

Associated Objects

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

UsageEntitlementEntryFeed

Feed tracking is available for the object.

UsageEntitlementEntryHistory

History is available for tracked fields of the object.

UsageEntitlementEntryOwnerSharingRule

Sharing rules are available for the object.

UsageEntitlementEntryShare

Sharing is available for the object.

UsageGrantRenewalPolicy

Represents a policy about the rollover of a usage grant. This object is available in API version 62.0 and later.

A usage grant renewal policy is used if you want to never renew a usage grant or renew on a specific frequency.

Supported Calls

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

Fields

Field	Details
Code	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description A unique user-defined string for the usage grant renewal policy.</p>
IsRenewalAllowed	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the policy renewal is allowed (<code>true</code>) or not (<code>false</code>). If <code>true</code>, then the policy can be renewed. The default value is <code>false</code>.</p>

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date when this record was last referenced.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the renewal policy record.</p>
RenewalFrequency	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The frequency of the policy renewals, when used with the <code>RenewalFrequencyUnit</code> field.</p>
RenewalFrequencyUnit	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The renewal duration for a policy. Valid values are:</p> <ul style="list-style-type: none">• Month• Quarter• Year

Field	Details
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The status of the renewal policy. Valid values are:</p> <ul style="list-style-type: none"> • Active • Draft • Inactive

Associated Objects

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

[UsageGrantRenewalPolicyFeed](#)

Feed tracking is available for the object.

[UsageGrantRenewalPolicyHistory](#)

History is available for tracked fields of the object.

UsageGrantRolloverPolicy

Represents a policy about the rollover of a usage grant. 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
Code	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description A unique user-defined string for the usage grant rollover policy.</p>

Field	Details
IsRolloverAllowed	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the policy allows the rollover of the usage grant. The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date when this record was last referenced.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
MaximumRolloverCount	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The maximum number of times that the usage grant can roll over.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the rollover policy record.</p>
ShouldAllowRolloverExpiry	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description</p> <p>Indicates whether the rollover for the associated usage grant is allowed to expire.</p> <p>The default value is <code>false</code>.</p>
Status	<p>Type</p> <p>picklist</p> <p>Properties</p> <p>Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description</p> <p>Specifies the status of the rollover policy.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> • Active • Draft • Inactive

Associated Objects

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

UsageGrantRolloverPolicyFeed

Feed tracking is available for the object.

UsageGrantRolloverPolicyHistory

History is available for tracked fields of the object.

UsageOveragePolicy

Represents the set of rules that determine the management of usage resource's units consumed beyond the granted limit. This object is available in API version 65 and later.

Supported Calls

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

Fields

Field	Details
LastReferencedDate	<p>Type</p> <p>dateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description Date and time when the current user last viewed or modified this record, a record related to this record, or a list view.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Date and time when the current user last viewed or modified this record.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the usage overage policy.</p>
OverageChargeable	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies whether the overconsumption beyond the granted quantity is to be charged. Valid values are:</p> <ul style="list-style-type: none"> • No • Yes

UsagePrdGrantBindingPolicy

Represents the association of a usage resource's grants with a sellable 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
GrantBindingTargetType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The type of binding instance to which the grant is added. Valid values are:</p> <ul style="list-style-type: none"> • Custom • Product • Contract • Account
GrantBindingType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The type of binding that indicates where the grant is added. Valid values are:</p> <ul style="list-style-type: none"> • Self • Target
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date when this record was last referenced.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
Name	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Autogenerated identifier for the usage product grant binding policy.</p>
Product2Id	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The sellable product associated with the usage product grant binding policy. This field is a relationship field.</p> <p>Relationship Name Product2</p> <p>Refers To Product2</p>

Associated Objects

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

[UsagePrdGrantBindingPolicyFeed](#)

Feed tracking is available for the object.

[UsagePrdGrantBindingPolicyHistory](#)

History is available for tracked fields of the object.

UsageRatableSummary

Represents the aggregation of the usage summaries that are used to calculate the rate at which the overages are charged. 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
AccountId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The account that's associated with the ratable summary. This field is a relationship field.</p> <p>Relationship Name Account</p> <p>Refers To Account</p>
AssetId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The asset that's associated with the ratable summary. This field is a relationship field.</p> <p>Relationship Name Asset</p> <p>Refers To Asset</p>
EndTime	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The end date and time of the ratable period.</p>
ErrorCode	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The code that represents the error encountered when the ratable summary is rated. Valid value is:</p> <ul style="list-style-type: none"> INTERNAL_ERROR
ErrorDescription	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The error description that corresponds to the error code.</p>
GrantBindingTargetId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The record that's associated with the usage ratable summary. Available in API version 64.0 and later. This field is a relationship field.</p> <p>Relationship Name GrantBindingTarget</p> <p>Refers To Account, Asset, BindingObjectCustomExt, Contract</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date when this record was last referenced.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Autogenerated identifier for the usage ratable summary record.</p>
NetUnitRate	<p>Type double</p>

Field	Details
	<p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The rate that's used to calculate the amount for each unit of usage entitlement overage.</p>
NetUnitRateUomId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The unit of measure for the net unit rate applied to the overage. This field is a relationship field.</p> <p>Relationship Name NetUnitRateUom</p> <p>Refers To UnitOfMeasure</p>
OverageQuantity	<p>Type double</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The quantity of the usage entitlements that were overused.</p>
OverageQuantityUomId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The unit of measure that's used for overage quantity. This field is a relationship field.</p> <p>Relationship Name OverageQuantityUom</p> <p>Refers To UnitOfMeasure</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description The ID of the owner of the usage ratable summary. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
RatingDecisionDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The date and time when the decision about rating consumption is done.</p>
RatingExecutionIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the rating service execution that's used to retrieve waterfall logs.</p>
RatingRequestId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID that invokes the rating service that's used to rate the usage ratable summary. This field is a relationship field.</p> <p>Relationship Name RatingRequest</p> <p>Refers To RatingRequest</p>
SourceUsageResourceId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The usage resource that's rated in tokens when usage ratable summary is created. This field is available in API version 65.0 and later.</p>

Field	Details
	<p>This field is a relationship field.</p> <p>Relationship Name SourceUsageResource</p> <p>Refers To UsageResource</p>
StartDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The start date and time of the ratable period.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The status of the ratable summary. Valid values are:</p> <ul style="list-style-type: none"> • New • RatingComplete • RatingFailed • SummaryCreated • Inactive—Available in API version 65.0 and later.
TierQuantity	<p>Type double</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The quantity that impacts the net unit rate of a usage entitlement.</p>
TierQuantityUomId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The unit of measure for the tier quantity. This field is a relationship field.</p>

Field	Details
	<p>Relationship Name TierQuantityUom</p> <p>Refers To UnitOfMeasure</p>
TotalAmount	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The total amount after calculating the overage based on the net unit rate.</p>
UsageEntitlementAccountId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The usage entitlement account that's associated with the source of the ratable summary. This field is a relationship field.</p> <p>Relationship Name UsageEntitlementAccount</p> <p>Refers To UsageEntitlementAccount</p>
UsageEntitlementBucketId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The usage entitlement bucket that's associated with the source of the ratable summary. This field is a relationship field.</p> <p>Relationship Name UsageEntitlementBucket</p> <p>Refers To UsageEntitlementBucket</p>
UsageResourceId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p>

Field	Details
	<p>Description</p> <p>The usage resource associated with the usage entitlement bucket.</p> <p>This field is a relationship field.</p> <p>Relationship Name</p> <p>UsageResource</p> <p>Refers To</p> <p>UsageResource</p>

Associated Objects

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

UsageRatableSummaryHistory

History is available for tracked fields of the object.

UsageRatableSummaryOwnerSharingRule


Sharing rules are available for the object.

UsageRatableSummaryShare

Sharing is available for the object.

UsageRatableSumCmtAssetRt

Represents the rate that's calculated and applicable for the usage resource associated with the commitment assets related to an anchor. This object is available in API version 65.0 and later.

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

Supported Calls

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

Special Access Rules

Fields

Field	Details
CommitmentAssetId	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description The asset ID associated with the Usage Ratable Summary. This field is a relationship field.</p> <p>Relationship Name CommitmentAsset</p> <p>Refers To Asset</p>
ErrorCode	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the unique code generated when an error occurs. Valid value is INTERNAL_ERROR.</p>
ErrorDescription	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the description of the error that occurred.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date when this record was last referenced.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed this record.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p>

Field	Details
	<p>Description Name of the Usage Commitment Summary record.</p>
NetUnitRate	<p>Type double</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The calculated per-unit rate for usage after applying commitment-specific discounts during the rating process.</p>
UsageRatableSummaryId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The usage ratable summary associated with the usage commitment summary record. This field is a relationship field.</p> <p>Relationship Name UsageRatableSummary</p> <p>Relationship Type Master-detail</p> <p>Refers To UsageRatableSummary (the master object)</p>

Associated Objects

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

[UsageRatableSumCmtAssetRtHistory](#)

History is available for tracked fields of the object.

UsageResource

Represents an entitlement granted to a user or party by a provider, such as data storage, computing power, bandwidth, or any other product or service. Additionally, this object is used to represent resources consumed over time. 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
Category	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The category of the usage resource that's used to organize and understand the product grant maps.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • <code>Currency</code>—Available in API version 65.0 and later. • <code>Usage</code> • <code>Token</code>—Available in API version 64.0 and later.
Code	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The unique user-defined string for the usage resource.</p>
DefaultUnitOfMeasureId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The default unit of measure for the given resource. The default value can be overridden with an alternate default unit of measure for a given resource.</p> <p>This field is a relationship field.</p> <p>Relationship Name DefaultUnitOfMeasure</p> <p>Refers To UnitOfMeasure</p>
Description	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The description of the usage resource.</p>

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date when this record was last referenced.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the usage resource record.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the owner of the usage resource record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The status of the usage resource. Valid values are:</p> <ul style="list-style-type: none">• Active

Field	Details
	<ul style="list-style-type: none"> Draft Inactive
TokenResourceId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The usage resource of Category <code>Token</code> that's used to charge this usage resource. For example, you can select a usage resource Credits (Token category) to rate the usage resource Data (Usage category). This field is available in API version 65.0 and later.</p> <p>Relationship Name TokenResource</p> <p>Refers To UsageResource</p>
UnitOfMeasureClassId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The unit of measure class that's used with the resource to define the units in which this resource is measured. This field is a relationship field.</p> <p>Relationship Name UnitOfMeasureClass</p> <p>Refers To UnitOfMeasureClass</p>
UsageDefinitionProductId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The product associated with the usage resource to retrieve tax policy, calculate rating during overages, and other invoicing actions. This field is a relationship field.</p> <p>Relationship Name UsageDefinitionProduct</p> <p>Refers To Product2</p>

Field	Details
UsageResourceBillingPolicyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The usage resource billing policy that defines how the usage resource can be aggregated before it's sent for rating. This field is a relationship field. This field is deprecated and will be retired in a future version.</p> <p>Relationship Name UsageResourceBillingPolicy</p> <p>Refers To UsageResourceBillingPolicy</p>

Associated Objects

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

UsageResourceFeed

Feed tracking is available for the object.

UsageResourceHistory

History is available for tracked fields of the object.

UsageResourceOwnerSharingRule


Sharing rules are available for the object.

UsageResourceShare

Sharing is available for the object.

UsageResourcePolicy

Represents the policies applicable to the usage resource whether it's associated with a sellable product or not. This object is available in API version 65 and later.

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

Supported Calls

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

Special Access Rules

Fields

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Date and time when the current user last viewed or modified this record, a record related to this record, or a list view.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Date and time when the current user last viewed or modified this record.</p>
RatingFrequencyPolicyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The rating frequency policy associated with the usage resource. This field is a relationship field.</p> <p>Relationship Name RatingFrequencyPolicy</p> <p>Refers To RatingFrequencyPolicy</p>
UsageAggregationPolicyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The usage aggregation policy associated with the usage resource. This field is a relationship field.</p> <p>Relationship Name UsageAggregationPolicy</p>

Field	Details
	<p>Refers To UsageResourceBillingPolicy</p>
UsageCommitmentPolicyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The usage commitment policy associated with the usage resource. This field is a relationship field.</p> <p>Relationship Name UsageCommitmentPolicy</p> <p>Refers To UsageCommitmentPolicy</p>
UsageOveragePolicyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The usage overage policy associated with the usage resource. This field is a relationship field.</p> <p>Relationship Name UsageOveragePolicy</p> <p>Refers To UsageOveragePolicy</p>
UsageResourceId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The usage resource associated with the usage resource policy. This field is a relationship field.</p> <p>Relationship Name UsageResource</p> <p>Relationship Type Master-detail</p> <p>Refers To UsageResource (the master object)</p>

UsageResourceBillingPolicy

Represents information about how the usage is accumulated before rating a usage resource. This object is available in API version 62.0 and later.

A usage resource billing policy object is used to configure the properties of usage resources related to how aggregation is performed on the usage records before rating. Usage resource billing policies are defined at the usage resource level and can be reused across multiple usage resources.

Supported Calls

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

Fields

Field	Details
Code	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description A unique user-defined string for the usage resource billing policy.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date when this record was last referenced.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The name of the usage resource billing policy record.</p>

Field	Details
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The status of the policy. Valid values are:</p> <ul style="list-style-type: none"> • Active • Draft • Inactive
UsageAccumulationMethod	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update, Defaulted On Create</p> <p>Description The method used to accumulate the usage. Valid values are:</p> <ul style="list-style-type: none"> • Peak • Sum
UsageAccumulationPeriod	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The duration for which the usage is accumulated. Valid values are:</p> <ul style="list-style-type: none"> • Daily • Monthly

Associated Objects

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

[UsageResourceBillingPolicyFeed](#)

Feed tracking is available for the object.

[UsageResourceBillingPolicyHistory](#)

History is available for tracked fields of the object.

UsageSummary

Represents the aggregation of the entries in the transaction journal for a usage entitlement for a specified period. This object is available in API version 63.0 and later.

Supported Calls

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

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The account that's associated with the sellable product that was purchased. This field is a relationship field.</p> <p>Relationship Name Account</p> <p>Refers To Account</p>
AssetId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The asset that's associated with the entitlement that was summarized. This field is a relationship field.</p> <p>Relationship Name Asset</p> <p>Refers To Asset</p>
ConsumptionUnits	<p>Type double</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The quantity that was used by the usage entitlement bucket.</p>

Field	Details
DebitedUnits	<p>Type double</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The units that are debited from the associated usage entitlement bucket.</p>
EndTime	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The end date and time of the usage summary.</p>
GrantBindingTargetId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The record that's associated with the usage summary. Available in API version 64.0 and later. This field is a relationship field.</p> <p>Relationship Name GrantBindingTarget</p> <p>Refers To Account, Asset, BindingObjectCustomExt, Contract</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date when this record was last referenced.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp for when the current user last viewed a record related to this record.</p>

Field	Details
LiabileSummaryId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The usage billing period item that's associated with this usage summary. This field is a relationship field.</p> <p>Relationship Name LiabileSummary</p> <p>Refers To UsageBillingPeriodItem</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Autogenerated identifier for the usage summary record.</p>
OverageUnits	<p>Type double</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The quantity that was overused by the usage entitlement bucket.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the owner of the usage summary. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
ParentUsageSummaryId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The parent usage summary that's associated with this usage summary. This field is available in API version 65.0 and later. This field is a relationship field.</p> <p>Relationship Name ParentUsageSummary</p> <p>Refers To UsageSummary</p>
RatableSummaryId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ratable summary that's associated with this usage summary. This field is a relationship field.</p> <p>Relationship Name RatableSummary</p> <p>Refers To UsageRatableSummary</p>
StartDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The start date and time of the usage summary.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The status of the usage summary. Valid values are:</p> <ul style="list-style-type: none"> • DrawdownComplete • LiableSummaryComplete • New

Field	Details
	<ul style="list-style-type: none"> • RatableSummaryComplete • Rated • UsageSummaryComplete • UsageSummaryInProgress • Inactive—Available in API version 65.0 and later.
UomId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The unit of measure for the usage resource. This value overrides the default unit of measure defined in the associated unit of measure class. This field is a relationship field.</p> <p>Relationship Name Uom</p> <p>Refers To UnitOfMeasure</p>
UsageEntitlementAccountId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The usage entitlement account that's associated with the usage summary. This field is a relationship field.</p> <p>Relationship Name UsageEntitlementAccount</p> <p>Refers To UsageEntitlementAccount</p>
UsageEntitlementBucketId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The usage entitlement bucket that's associated with the usage summary. This field is a relationship field.</p> <p>Relationship Name UsageEntitlementBucket</p>

Field	Details
	<p>Refers To UsageEntitlementBucket</p>
UsageResourceId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The usage resource that's associated with the source of the usage entitlement bucket. This field is a relationship field.</p> <p>Relationship Name UsageResource</p> <p>Refers To UsageResource</p>

Associated Objects

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

[UsageSummaryHistory](#)

History is available for tracked fields of the object.

[UsageSummaryOwnerSharingRule](#)

Sharing rules are available for the object.

[UsageSummaryShare](#)

Sharing is available for the object.

Usage Management Fields on Standard Objects

Usage Management adds standard and custom fields to some standard Salesforce objects. These fields are available only in orgs where Usage Management is enabled. This object is available in API version 63.0 and later.

[Usage Management Fields on Product2](#)

Standard and custom fields extend the standard Product2 object for use in Usage Management to represent information about products.

[Usage Management Fields on TransactionJournal](#)

Standard and custom fields extend the standard Transaction Journal object for use in Usage Management to represent consumption details of a usage resource that are recorded for creating usage summaries. This object is available for usage management in API version 63.0 and later.

Usage Management Fields on Product2

Standard and custom fields extend the standard Product2 object for use in Usage Management to represent information about products.

Fields

Field	Details
UsageModelType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The type of usage model for a product or service. Valid values are:</p> <ul style="list-style-type: none"> • Anchor—The main subscription product or service. Available in API version 62.0 and later. • Pack—The add-on product or service that grants additional usage resources for consumption. Available in API version 62.0 and later. • Monetary Commitment—An agreement by a customer to spend a minimum amount for a product or service in a defined period. Available in API version 65.0 and later. • Quantity Commitment—An agreement by a customer to use a minimum quantity of a product or service in a defined period. Available in API version 65.0 and later. • Token Commitment—An agreement by a customer to use a minimum quantity of tokens for a product or service in a defined period. Available in API version 65.0 and later.

Usage Management Fields on TransactionJournal

Standard and custom fields extend the standard Transaction Journal object for use in Usage Management to represent consumption details of a usage resource that are recorded for creating usage summaries. This object is available for usage management in API version 63.0 and later.

Fields

Field	Details
UsageResourceId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The usage resource that's associated with the transaction journal. This field is a relationship field.</p> <p>Relationship Name UsageResource</p> <p>Refers To UsageResource</p>
UsageSummaryId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The usage summary that's associated with the transaction journal. Available in API version 64.0 and later. This field is a relationship field.</p> <p>Relationship Name UsageSummary</p> <p>Refers To UsageSummary</p>
UsageType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description The type of usage. Valid value is UsageManagement.</p>

Usage Management Standard Invocable Actions

Learn more about the standard invocable actions available with Usage Management.

[Invoke Summary Creation Action](#)

Invoke the service that creates various summaries, such as usage, ratable, and liable summaries where the usage amount is zero. The service also checks and updates the billing period of the usage entitlement account if the billing period is expired.

[Process Consumption Overages Action](#)

Process consumption overages for the usage summary records with SummaryComplete status. This action uses the entitlement service to process the overages.

[Refresh Usage Entitlement Bucket Action](#)

Refresh entitlements by evaluating the usage entitlement bucket records and creating a new usage entitlement entry.

[Retrigger Entitlement Creation Process Action](#)

Retrigger entitlement creation process for failed or unprocessed assets.

SEE ALSO:

[Actions Developer Guide: Overview](#)

[REST API Developer Guide: Invocable Actions Standard](#)

[Salesforce Help: Usage Management](#)

Invoke Summary Creation Action

Invoke the service that creates various summaries, such as usage, ratable, and liable summaries where the usage amount is zero. The service also checks and updates the billing period of the usage entitlement account if the billing period is expired.

This action is available in API version 63.0 and later.

Special Access Rules

The Invoke Summary Creation action is available in Enterprise, Developer, and Unlimited Editions where Usage Management is enabled.

To use this action, you need the Usage Management Run Time User permission.

Supported REST HTTP Methods

URI

`/services/data/v65.0/actions/standard/invokeSummaryCreationService`

Formats

JSON, XML

HTTP Methods

POST

Authentication

Authorization: Bearer *token*

Inputs

Input	Details
usageEntitlementAccountId	<p>Type</p> <p>string</p> <p>Description</p> <p>Required.</p> <p>ID of the usage entitlement account record that's used to create summaries.</p>

Outputs

None.

Example

POST

This example shows a sample request for the Invoke Summary Creation action.

```
{
  "inputs": [
    {
      "usageEntitlementAccountId": "3ttDU00000000izYQAQ"
    }
  ]
}
```

This example shows a sample response for the Invoke Summary Creation action.

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

SEE ALSO:

[Salesforce Help: Permission Set Licenses, Personas, and User Permissions for Usage Management](#)

Process Consumption Overages Action

Process consumption overages for the usage summary records with `SummaryComplete` status. This action uses the entitlement service to process the overages.

This action is available in API version 63.0 and later.

Special Access Rules

The Process Consumption Overages action is available in Enterprise, Developer, and Unlimited Editions where Usage Management is enabled. To use this action, you need the Usage Management Run Time User permission.

Supported REST HTTP Methods

URI

`/services/data/v65.0/actions/standard/processConsumptionOverages`

Formats

JSON, XML

HTTP Methods

POST

Authentication

Authorization: Bearer *token*

Inputs

Input	Details
usageRatableSummaryId	<p>Type string</p> <p>Description Required. ID of the usage ratable summary record that contains the consumption details, and is used to calculate consumption overages and create usage entitlement entry records.</p>

Outputs

None.

Example

POST

This example shows a sample request for the Process Consumption Overages action.

```
{
  "inputs": [
    {
      "usageRatableSummaryId": "3ttDU00000000iZYAQ"
    }
  ]
}
```

This example shows a sample response for the Process Consumption Overages action.

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

SEE ALSO:

[Salesforce Help: Permission Set Licenses, Personas, and User Permissions for Usage Management](#)

Refresh Usage Entitlement Bucket Action

Refresh entitlements by evaluating the usage entitlement bucket records and creating a new usage entitlement entry.

This action is available in API version 63.0 and later.

Special Access Rules

The Refresh Usage Entitlement Bucket action is available in Enterprise, Developer, and Unlimited Editions where Usage Management is enabled. To use this action, you need the Usage Management Run Time User permission.

Supported REST HTTP Methods

URI

```
/services/data/v65.0/actions/standard/refreshUsageEntitlementBucket
```

Formats

JSON, XML

HTTP Methods

POST

Authentication

Authorization: Bearer *token*

Inputs

Input	Details
<code>transactionUsageEntitlementId</code>	<p>Type string</p> <p>Description Required. ID of the transaction usage entitlement record that's associated with the usage entitlement buckets that you need to refresh.</p>

Outputs

None.

Example

POST

This example shows a sample request for the Refresh Usage Entitlement Bucket action.

```
{
  "inputs": [
    {
      "transactionUsageEntitlementId": "3ttDU00000000izYAQ"
    }
  ]
}
```

This example shows a sample response for the Refresh Usage Entitlement Bucket action.

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

SEE ALSO:

[Salesforce Help: Permission Set Licenses, Personas, and User Permissions for Usage Management](#)

Retrigger Entitlement Creation Process Action

Retrigger entitlement creation process for failed or unprocessed assets.

Trigger the entitlement creation process again in these scenarios.

- Process failed assets in the asset to entitlement journey.
- Assetize or create wallets for assets without corresponding records in Usage Management.

This action is available in API version 65.0 and later.

Special Access Rules

The Retrigger Entitlement Creation Process action is available in Enterprise, Developer, and Unlimited Editions where Usage Management is enabled. To use this action, you need the Usage Management Run Time User permission.

Supported REST HTTP Methods

URI

`/services/data/v65.0/actions/standard/retriggerEntlCreaProc`

Formats

JSON, XML

HTTP Methods

POST

Authentication

Authorization: Bearer *token*

Inputs

Input	Details
assetId	<p>Type</p> <p>string</p> <p>Description</p> <p>Required.</p> <p>ID of the asset for which you want to trigger the asset to entitlement process again.</p>

Outputs

None.

Example

POST

Here's a sample request for the Retrigger Entitlement Creation Process action.

```
{
  "inputs": [
    {
      "assetId": "02iSB000000JzZFYA0"
    }
  ]
}
```

Here's a sample response for the Retrigger Entitlement Creation Process action.

```
[
  {
    "actionName": "retriggerEntlCreaProc",
    "errors": null,
    "invocationId": null,
    "isSuccess": true,
    "outcome": null,
    "outputValues": null,
    "sortOrder": -1,
    "version": 1
  }
]
```

Usage Management Business APIs

Use the Usage Management Business APIs to get details of a usage-based product that's associated with an asset, an order item, or a quote line item.

This table lists the available Usage Management resources.

Resource	Description
/asset-management/assets/assetId/usage-details (GET)	Get details of a usage-based product associated with an asset. This covers details of grants, resources, and configured rates for the product, including negotiated rates in case of a rate override.
/commerce/sales-orders/line-items/orderItemId/usage-details (GET)	Get details of a usage-based product associated with an order item.

Resource	Description
/commerce/quotes/line-items/<i>quoteLineItemId</i>/usage-details (GET)	Get details of a usage-based product associated with a quote line item.
/revenue/usage-management/binding-objects/<i>bindingObjectId</i>/actions/usage-details (GET)	Get details of grants, resources, rates, and any configured policies for a specified binding object.

Resources

Learn more about the available Usage Management API resources.

Response Bodies

Learn more about the available response bodies of Usage Management APIs.

SEE ALSO:

[Connect REST API Developer Guide: Introduction](#)

Resources

Learn more about the available Usage Management API resources.

[Asset Usage Details \(GET\)](#)

Get details of a usage-based product associated with an asset. This covers details of grants, resources, and configured rates for the product, including negotiated rates in case of a rate override.

[Binding Object Usage Details \(GET\)](#)

Get details of grants, resources, rates, and any configured policies for a specified binding object.

[Order Item Usage Details \(GET\)](#)

Get details of a usage-based product associated with an order item.

[Quote Line Item Usage Details \(GET\)](#)

Get details of a usage-based product associated with a quote line item.

Asset Usage Details (GET)

Get details of a usage-based product associated with an asset. This covers details of grants, resources, and configured rates for the product, including negotiated rates in case of a rate override.

Here are the details that this API returns.

- Grants and resources for the product, if rates aren't configured.
- Grants, resources, and any configured rates for the product. The rates are returned by the [Rate Plan \(GET\) API](#).
- Resources that include grants, if applicable, and any negotiated rates for the product in case of a rate override request.

This API doesn't return binding target rates. Use the [Binding Object Usage Details API](#) to retrieve binding target rates.

Resource

```
/asset-management/assets/assetId/usage-details
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/asset-management/assets/02iRM0000000tCdYAI/usage-details
```

Available version

63.0

HTTP methods

GET

Path parameter for GET

Parameter Name	Type	Description	Required or Optional	Available Version
assetId	String	ID of the asset.	Required	63.0

Query parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
effectiveDate	String	Date that's used to search for the applicable rate card entries.	Required	63.0
optionalFields	String[]	Custom fields that you can use to query these objects. <ul style="list-style-type: none"> • AssetRateCardEntry • AssetRateAdjustment 	Optional	63.0

Response body for GET
[Usage Details](#)
Binding Object Usage Details (GET)

Get details of grants, resources, rates, and any configured policies for a specified binding object.

Use this API to display the details for a binding object during the selling journey. Additionally, display the details after assetization on the selected binding objects.

The supported binding objects are Account, Contract, BindingObjectCustomExt, or Anchor Asset that's not bound to a target.

Resource

```
/revenue/usage-management/binding-objects/bindingObjectId/actions/usage-details
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/revenue/usage-management/binding-objects/1Bn000004C96U/actions/usage-details?effectiveDate=2025-03-07
```


Path parameter for GET

Parameter Name	Type	Description	Required or Optional	Available Version
orderId	String	ID of the order item.	Required	63.0

Query parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
effectiveDate	String	Date that's used to search for the applicable rate card entries.	Optional	63.0
optionalFields	String[]	Custom fields that you can use to query these objects. <ul style="list-style-type: none"> OrderItemRateCardEntry OrderItemRateAdjustment 	Optional	63.0

Response body for GET

[Usage Details](#)

Quote Line Item Usage Details (GET)

Get details of a usage-based product associated with a quote line item.

Here are the details that this API returns.

- Grants and resources for the product, if rates aren't configured.
- Grants, resources, and any configured rates for the product. The rates are returned by the [Rate Plan \(GET\) API](#).
- Resources that include grants, if applicable, and any negotiated rates for the product in case of a rate override request.

This API doesn't return binding target rates. Use the [Binding Object Usage Details API](#) to retrieve binding target rates.

Resource

```
/commerce/quotes/line-items/quoteLineItemId/usage-details
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/commerce/quotes/line-items/QLXXXXXXXXXXABC/usage-details
```

Available version

62.0

HTTP methods

GET

Request parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
effectiveDate	String	Date that's used to search for the applicable rate card entries.	Optional	62.0
optionalFields	String[]	Custom fields that you can use to query these objects. <ul style="list-style-type: none"> • QuoteLineRateCardEntry • QuoteLineRateAdjustment 	Optional	62.0

Response body for GET

[Usage Details](#)

Response Bodies

Learn more about the available response bodies of Usage Management APIs.

[Binding Object Detail](#)

Output representation of the list of records with the binding target details.

[Binding Object Grant Detail](#)

Output representation of the details of usage resource grants for a specified binding object.

[Binding Object Rate Adjustments](#)

Output representation of the details of binding target rate adjustments.

[Binding Object Rate](#)

Output representation of the details of Binding Object Rates object or Asset Rates object.

[Binding Object Resource Grant And Policy Detail](#)

Output representation of the details of resource grants and binding policies.

[Binding Object Resource Policy Detail](#)

Output representation of the details of a usage resource policy.

[Binding Object Usage Detail](#)

Output representation of the usage details of a binding object.

[Fields Response](#)

Output representation of the details of the optional fields on the usage-based selling-related objects.

[Binding Object Usage Detail](#)

Output representation of the usage details of a binding object.

[Grant Detail](#)

Output representation of the details of a grant from the ProductUsageGrant, LineItemUsageResourceGrant, or TransactionUsageEntitlement objects.

[Lookup Detail](#)

Output representation of the details of a usage resource record.

[Policy Details](#)

Output representation of the details of a policy.

[Rate Adjustments](#)

Output representation of the details of a rate adjustment.

[Rate Card Entry](#)

Output representation of the details of a rate card entry.

[Resource Policy Detail](#)

Output representation of the details of a usage resource policy.

[Usage Details](#)

Output representation of the usage details of a quote, an order, or an asset.

[Usage Details Error Response](#)

Output representation of the details of an error related to usage details.

[Usage Resource Grant And Policy Detail](#)

Output representation of the details of a usage resource grant and policy.

Binding Object Detail

Output representation of the list of records with the binding target details.

JSON example

This example includes the details of a binding object.

```
{
  "records": [
    {
      "bindingObjectRate": {
        "id": "1QNSB0000001JyH4AU,1QNSB0000001JyI4AU",
        "negotiatedRate": null,
        "negotiatedRateAdjustments": [
          {
            "lowerBound": 101,
            "name": null,
            "rateAdjustmentId": "1DMSB000001N3C74AK",
            "rateAdjustmentType": "Amount",
            "rateAdjustmentValue": 10,
            "tierUnitOfMeasure": "USD",
            "upperBound": null
          },
          {
            "lowerBound": 1,
            "name": null,
            "rateAdjustmentId": "1DMSB000001N3C64AK",
            "rateAdjustmentType": "Percentage",
            "rateAdjustmentValue": 30,
            "tierUnitOfMeasure": "USD",
            "upperBound": 100
          }
        ]
      },
      "rate": 100,
      "rateCardEntryId": "1CJSB000000207R4AQ,1CJSB000000207S4AQ",
    }
  ]
}
```

```
    "rateUnitOfMeasureName": "USD"
  },
  "bindingObjectResourceGrantAndPolicyDetail": {
    "bindingObjectGrantDetail": [
      {
        "effectiveEndDate": "Sat Oct 04 23:59:59 GMT 2025",
        "effectiveStartDate": "Fri Sep 05 00:00:00 GMT 2025",
        "grantType": "Grant",
        "id": "1B0SB0000000Eiv0AE",
        "product": {
          "id": "01tSB000006XMTqYAG"
        },
        "quantity": 100,
        "record": {
          "id": "02iSB0000000IoETyA0"
        },
        "unitOfMeasure": {
          "id": "0hESB0000003yfp2AA"
        },
        "usageRefreshPolicy": {
          "id": "1BYSB00000011OH4AY",
          "negotiable": null
        },
        "usageRolloverPolicy": {
          "id": "1BVSb0000000A1xJ4AS",
          "negotiable": null
        },
        "validityPeriodTerm": 1,
        "validityPeriodUnit": "Month"
      }
    ],
    "bindingObjectResourcePolicyDetail": {
      "drawdownOrder": "ExpiringFirst",
      "id": "1X2SB00000002WT0AY",
      "ratingFrequencyPolicy": {
        "id": "1HJSB00000000G3B4AU",
        "negotiable": null
      },
      "usageAggregationPolicy": {
        "id": "1cfSB00000001xHPYAY",
        "negotiable": null
      },
      "usageCommitmentPolicy": {
        "id": null,
        "negotiable": null
      },
      "usageOveragePolicy": {
        "id": "7UkSB000000002OP0AY",
        "negotiable": null
      }
    }
  },
  "usageResource": {
    "id": "1BRsB00000001x4h4AA"
```

```

    }
  }
]
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
bindingObjectRate	Binding Object Rate	Details about the Binding Object Rates object or Asset Rates object.	Big, 65.0	65.0
bindingObjectResourceGrantAndPolicyDetail	Binding Object Resource Grant and Policy Detail	Details about the resource grants and binding policies.	Big, 65.0	65.0
usageResource	Lookup Detail	Details of the usage resource such as the ID of the record.	Big, 65.0	65.0

Binding Object Grant Detail

Output representation of the details of usage resource grants for a specified binding object.

JSON example

This example includes the details of usage resource grants for a specified binding object.

```

{
  "bindingObjectGrantDetail": [
    {
      "effectiveEndDate": "Sat Oct 04 23:59:59 GMT 2025",
      "effectiveStartDate": "Fri Sep 05 00:00:00 GMT 2025",
      "grantType": "Grant",
      "id": "1B0SB000000Eiv0AE",
      "product": {
        "id": "01tSB000006XmtqYAG"
      },
      "quantity": 100,
      "record": {
        "id": "02iSB000000IoETYA0"
      },
      "unitOfMeasure": {
        "id": "0hESB0000003yfp2AA"
      },
      "usageRefreshPolicy": {
        "id": "1BYSB0000001lOH4AY",
        "negotiable": null
      },
      "usageRolloverPolicy": {
        "id": "1BVS0000000AlxJ4AS",
        "negotiable": null
      },
      "validityPeriodTerm": 1,
      "validityPeriodUnit": "Month"
    }
  ]
}

```

```

    ]
  }

```

Property Name	Type	Description	Filter Group and Version	Available Version
effective EndDate	String	Effective end date for the asset lifecycle.	Big, 65.0	65.0
effective StartDate	String	Effective start date for the asset lifecycle.	Big, 65.0	65.0
grantType	String	Type of usage resource grant.	Big, 65.0	65.0
id	String	ID of the Transaction Usage Entitlement record responsible for the grant.	Big, 65.0	65.0
product	Lookup Detail	Details of the product.	Big, 65.0	65.0
quantity	Double	Quantity of the binding object usage resource grant.	Big, 65.0	65.0
record	Lookup Detail	ID of the asset.	Big, 65.0	65.0
unitOfMeasure	Lookup Detail	unit of measure of the usage resource.	Big, 65.0	65.0
usageRefresh Policy	Policy Detail	ID of the usage grant refresh policy.	Big, 65.0	65.0
usageRollover Policy	Policy Detail	ID of the usage grant rollover policy.	Big, 65.0	65.0
validityPeriod Term	Double	Validity period term of the usage resource grant.	Big, 65.0	65.0
validityPeriod Unit	String	Validity period unit of the usage resource grant.	Big, 65.0	65.0

Binding Object Rate Adjustments

Output representation of the details of binding target rate adjustments.

JSON example

This example includes the details of binding target rate adjustments.

```

{
  "negotiatedRateAdjustments": [
    {
      "lowerBound": 101,
      "name": null,
      "rateAdjustmentId": "1DMSB000001N3C74AK",
      "rateAdjustmentType": "Amount",
      "rateAdjustmentValue": 10,
      "tierUnitOfMeasure": "USD",
    }
  ]
}

```

```

    "upperBound": null
  },
  {
    "lowerBound": 1,
    "name": null,
    "rateAdjustmentId": "1DMSB000001N3C64AK",
    "rateAdjustmentType": "Percentage",
    "rateAdjustmentValue": 30,
    "tierUnitOfMeasure": "USD",
    "upperBound": 100
  }
]
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
lowerBound	Double	Minimum quantity for the adjustment to be applicable.	Small, 65.0	65.0
name	String	Name of the tier or binding object rate adjustment.	Small, 65.0	65.0
rateAdjustmentId	String	ID of the binding object rate adjustment.	Small, 65.0	65.0
rateAdjustmentType	String	Type of the binding object rate adjustment.	Small, 65.0	65.0
rateAdjustmentValue	Double	Value of the binding object rate adjustment.	Small, 65.0	65.0
tierUnitOfMeasure	String	Unit of measure that represents the tier or binding object rate adjustment.	Small, 65.0	65.0
upperBound	Double	Maximum quantity for the adjustment to be applicable.	Small, 65.0	65.0

Binding Object Rate

Output representation of the details of Binding Object Rates object or Asset Rates object.

JSON example

This example includes the details of a binding object rate.

```

{
  "bindingObjectRate": {
    "id": "1QNSB0000001JyH4AU,1QNSB0000001JyI4AU",
    "negotiatedRate": null,
    "negotiatedRateAdjustments": [
      {
        "lowerBound": 101,
        "name": null,
        "rateAdjustmentId": "1DMSB000001N3C74AK",
        "rateAdjustmentType": "Amount",
        "rateAdjustmentValue": 10,
        "tierUnitOfMeasure": "USD",

```

```

        "upperBound": null
    },
    {
        "lowerBound": 1,
        "name": null,
        "rateAdjustmentId": "1DMSB000001N3C64AK",
        "rateAdjustmentType": "Percentage",
        "rateAdjustmentValue": 30,
        "tierUnitOfMeasure": "USD",
        "upperBound": 100
    }
],
"rate": 100,
"rateCardEntryId": "1CJSB000000207R4AQ,1CJSB000000207S4AQ",
"rateUnitOfMeasureName": "USD"
}
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
id	String	ID of the Binding Object Rate Card Entry or Asset Rate Card Entry object.	Big, 65.0	65.0
negotiated Rate	Double	Negotiated rate available in the Binding Object Rate Card Entry or Asset Rate Card Entry object.	Big, 65.0	65.0
negotiatedRate Adjustments	Binding Object Rate Adjustments[]	List of rate adjustments available in the Binding Object Rate Adjustment or Asset Rate Adjustment.	Big, 65.0	65.0
rate	Double	Rate of the rate card entry associated to the Binding Object Rate Card Entry or Asset Rate Card Entry object.	Big, 65.0	65.0
rateCard EntryId	String	ID of the rate card entry associated to the Binding Object Rate Card Entry or Asset Rate Card Entry object.	Big, 65.0	65.0
rateUnitOf MeasureName	String	Rate unit of measure of the rates.	Big, 65.0	65.0

Binding Object Resource Grant And Policy Detail

Output representation of the details of resource grants and binding policies.

JSON example

This example includes the details of resource grants and binding policies for a specified binding object.

```
{
  "bindingObjectResourceGrantAndPolicyDetail": {
    "bindingObjectGrantDetail": [
      {
        "effectiveEndDate": "Sat Oct 04 23:59:59 GMT 2025",
        "effectiveStartDate": "Fri Sep 05 00:00:00 GMT 2025",
        "grantType": "Grant",
        "id": "1B0SB0000000Eiv0AE",
        "product": {
          "id": "01tSB000006XmtqYAG"
        },
        "quantity": 100,
        "record": {
          "id": "02iSB000000IoETYA0"
        },
        "unitOfMeasure": {
          "id": "0hESB0000003yfp2AA"
        },
        "usageRefreshPolicy": {
          "id": "1BYSB00000011OH4AY",
          "negotiable": null
        },
        "usageRolloverPolicy": {
          "id": "1BVSB0000000AlxJ4AS",
          "negotiable": null
        },
        "validityPeriodTerm": 1,
        "validityPeriodUnit": "Month"
      }
    ],
    "bindingObjectResourcePolicyDetail": {
      "drawdownOrder": "ExpiringFirst",
      "id": "1X2SB00000002WT0AY",
      "ratingFrequencyPolicy": {
        "id": "1HJSB0000000G3B4AU",
        "negotiable": null
      },
      "usageAggregationPolicy": {
        "id": "1cfSB0000001xHPYAY",
        "negotiable": null
      },
      "usageCommitmentPolicy": {
        "id": null,
        "negotiable": null
      },
      "usageOveragePolicy": {
        "id": "7UkSB00000002OP0AY",
        "negotiable": null
      }
    }
  }
}
```



```
}
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
bindingObjectGrantDetail	Binding Object Grant Detail[]	Details of the negotiated resource grants for the specified binding object.	Big, 65.0	65.0
bindingObjectResourcePolicyDetail	Binding Object Resource Policy Detail	Detail of the binding policies.	Big, 65.0	65.0

Binding Object Resource Policy Detail

Output representation of the details of a usage resource policy.

JSON example

This example includes the details of a usage resource policy.

```
{
  "bindingObjectResourcePolicyDetail": {
    "drawdownOrder": "ExpiringFirst",
    "id": "1X2SB00000002WT0AY",
    "ratingFrequencyPolicy": {
      "id": "1HJSB0000000G3B4AU",
      "negotiable": null
    },
    "usageAggregationPolicy": {
      "id": "1cfSB0000001xHPYAY",
      "negotiable": null
    },
    "usageCommitmentPolicy": {
      "id": null,
      "negotiable": null
    },
    "usageOveragePolicy": {
      "id": "7UksB00000002OP0AY",
      "negotiable": null
    }
  }
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
drawdownOrder	String	Specifies the order or way to process the drawdown. See Usage Management Essentials to know more about a drawdown process.	Big, 65.0	65.0
id	String	ID of the Binding Object Usage Resource Policy record.	Big, 65.0	65.0

Property Name	Type	Description	Filter Group and Version	Available Version
ratingFrequency Policy	Policy Detail	Details of the rating frequency policy.	Big, 65.0	65.0
usageAggregation Policy	Policy Detail	Details of the usage aggregation policy.	Big, 65.0	65.0
usageCommitment Policy	Policy Detail	Details of the commitment policy of the usage resource.	Big, 65.0	65.0
usageOverage Policy	Policy Detail	Details of the overage policy of the usage resource.	Big, 65.0	65.0

Binding Object Usage Detail

Output representation of the usage details of a binding object.

JSON example

This example shows a sample successful response.

```
{
  "records": [
    {
      "bindingObjectRate": {
        "id": "1QNSB0000001JyH4AU,1QNSB0000001JyI4AU",
        "negotiatedRate": null,
        "negotiatedRateAdjustments": [
          {
            "lowerBound": 101,
            "name": null,
            "rateAdjustmentId": "1DMSB000001N3C74AK",
            "rateAdjustmentType": "Amount",
            "rateAdjustmentValue": 10,
            "tierUnitOfMeasure": "USD",
            "upperBound": null
          },
          {
            "lowerBound": 1,
            "name": null,
            "rateAdjustmentId": "1DMSB000001N3C64AK",
            "rateAdjustmentType": "Percentage",
            "rateAdjustmentValue": 30,
            "tierUnitOfMeasure": "USD",
            "upperBound": 100
          }
        ],
        "rate": 100,
        "rateCardEntryId": "1CJSB000000207R4AQ,1CJSB000000207S4AQ",
        "rateUnitOfMeasureName": "USD"
      },
      "bindingObjectResourceGrantAndPolicyDetail": {
        "bindingObjectGrantDetail": [
```

```
{
  "effectiveEndDate": "Sat Oct 04 23:59:59 GMT 2025",
  "effectiveStartDate": "Fri Sep 05 00:00:00 GMT 2025",
  "grantType": "Grant",
  "id": "1B0SB0000000Eiv0AE",
  "product": {
    "id": "01tSB000006XMtqYAG"
  },
  "quantity": 100,
  "record": {
    "id": "02iSB000000IoETyA0"
  },
  "unitOfMeasure": {
    "id": "0hESB0000003yfp2AA"
  },
  "usageRefreshPolicy": {
    "id": "1BYSB00000011OH4AY",
    "negotiable": null
  },
  "usageRolloverPolicy": {
    "id": "1BVS0000000A1xJ4AS",
    "negotiable": null
  },
  "validityPeriodTerm": 1,
  "validityPeriodUnit": "Month"
}
],
"bindingObjectResourcePolicyDetail": {
  "drawdownOrder": "ExpiringFirst",
  "id": "1X2SB00000002WT0AY",
  "ratingFrequencyPolicy": {
    "id": "1HJSB0000000G3B4AU",
    "negotiable": null
  },
  "usageAggregationPolicy": {
    "id": "1cfSB00000001xHPYAY",
    "negotiable": null
  },
  "usageCommitmentPolicy": {
    "id": null,
    "negotiable": null
  },
  "usageOveragePolicy": {
    "id": "7UkSB000000002OP0AY",
    "negotiable": null
  }
}
},
"usageResource": {
  "id": "1BR0SB0000001x4h4AA"
}
}
]
```

Property Name	Type	Description	Filter Group and Version	Available Version
errors	Usage Detail Error Response[]	List of errors encountered during the processing of the API request.	Small, 65.0	65.0
records	Binding Object Detail[]	List of records that contains the binding target details.	Small, 65.0	65.0

Fields Response

Output representation of the details of the optional fields on the usage-based selling-related objects.

JSON Example

```

"fields": {
  "MyCustomDate__c": {
    "displayValue": "2024-09-24",
    "value": "2024-09-24T17:46:30.662Z"
  },
  "MyCustomNumber__c": {
    "displayValue": "20.0",
    "value": 20
  }
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
displayValue	String	Display value of a field.	Big, 63.0	63.0
value	Object	Value of a field in its original data form.	Big, 63.0	63.0

Binding Object Usage Detail

Output representation of the usage details of a binding object.

JSON example

This example shows a sample successful response.

```

{
  "records": [
    {
      "bindingObjectRate": {
        "id": "1QNSB0000001JyH4AU,1QNSB0000001JyI4AU",
        "negotiatedRate": null,
        "negotiatedRateAdjustments": [
          {
            "lowerBound": 101,
            "name": null,
            "rateAdjustmentId": "1DMSB000001N3C74AK",
            "rateAdjustmentType": "Amount",
            "rateAdjustmentValue": 10,

```

```

        "tierUnitOfMeasure": "USD",
        "upperBound": null
    },
    {
        "lowerBound": 1,
        "name": null,
        "rateAdjustmentId": "1DMSB000001N3C64AK",
        "rateAdjustmentType": "Percentage",
        "rateAdjustmentValue": 30,
        "tierUnitOfMeasure": "USD",
        "upperBound": 100
    }
],
"rate": 100,
"rateCardEntryId": "1CJSB000000207R4AQ,1CJSB000000207S4AQ",
"rateUnitOfMeasureName": "USD"
},
"bindingObjectResourceGrantAndPolicyDetail": {
    "bindingObjectGrantDetail": [
        {
            "effectiveEndDate": "Sat Oct 04 23:59:59 GMT 2025",
            "effectiveStartDate": "Fri Sep 05 00:00:00 GMT 2025",
            "grantType": "Grant",
            "id": "1B0SB0000000Eiv0AE",
            "product": {
                "id": "01tSB000006XMTqYAG"
            },
            "quantity": 100,
            "record": {
                "id": "02iSB000000IoETYA0"
            },
            "unitOfMeasure": {
                "id": "0hESB0000003yfp2AA"
            },
            "usageRefreshPolicy": {
                "id": "1BYSB00000011OH4AY",
                "negotiable": null
            },
            "usageRolloverPolicy": {
                "id": "1BVS0000000A1xJ4AS",
                "negotiable": null
            },
            "validityPeriodTerm": 1,
            "validityPeriodUnit": "Month"
        }
    ],
    "bindingObjectResourcePolicyDetail": {
        "drawdownOrder": "ExpiringFirst",
        "id": "1X2SB00000002WT0AY",
        "ratingFrequencyPolicy": {
            "id": "1HJSB0000000G3B4AU",
            "negotiable": null
        },
        "usageAggregationPolicy": {

```

```

        "id": "1cfSB0000001xHPYAY",
        "negotiable": null
    },
    "usageCommitmentPolicy": {
        "id": null,
        "negotiable": null
    },
    "usageOveragePolicy": {
        "id": "7UkSB00000002OP0AY",
        "negotiable": null
    }
}
},
"usageResource": {
    "id": "1BRSB0000001x4h4AA"
}
}
]
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
errors	Usage Detail Error Response[]	List of errors encountered during the processing of the API request.	Small, 65.0	65.0
records	Binding Object Detail[]	List of records that contains the binding target details.	Small, 65.0	65.0

Grant Detail

Output representation of the details of a grant from the ProductUsageGrant, LineItemUsageResourceGrant, or TransactionUsageEntitlement objects.

JSON Example

```

{
  "negotiatedGrantDetail": {
    "grantType": "Grant",
    "id": "1X6xx00000000000ECAy",
    "quantity": 100,
    "usageGrantNegotiable": "Negotiable",
    "usageRefreshPolicy": {
      "displayName": null,
      "id": "1BYxx0000004C92GAE",
      "negotiable": "Non-Negotiable"
    },
    "usageRolloverPolicy": {
      "displayName": null,
      "id": "1BVxx0000004C92GAE",
      "negotiable": "Non-Negotiable"
    },
    "validityPeriodTerm": 12,
  }
}

```

```

    "validityPeriodUnit": "Month"
  }
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
grantType	String	Details about the grant type.	Big, 65.0	65.0
id	String	ID of the usage resource grant.	Big, 65.0	65.0
quantity	Double	Quantity of the negotiated usage resource grant.	Big, 65.0	65.0
usageGrant Negotiable	String	Specifies whether the grant is negotiable or not.	Big, 65.0	65.0
usageRefresh Policy	Policy Detail	ID of the usage grant refresh policy.	Big, 65.0	65.0
usageRollover Policy	Policy Detail	ID of the usage grant rollover policy.	Big, 65.0	65.0
validity PeriodTerm	Double	Validity period term of the grant.	Big, 65.0	65.0
validity PeriodUnit	String	Validity period unit of the grant.	Big, 65.0	65.0

Lookup Detail

Output representation of the details of a usage resource record.

JSON example

This example includes the details of a usage resource.

```

{
  "usageResource": {
    "id": "1BRxx0000004C9EGAU"
  }
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
id	String	ID of the usage resource record.	Big, 65.0	65.0

Policy Details

Output representation of the details of a policy.

JSON example

This example includes the details for different policy types.

```
{
  "bindingObjectGrantDetail": [
    {
      "effectiveEndDate": "Sat Oct 04 23:59:59 GMT 2025",
      "effectiveStartDate": "Fri Sep 05 00:00:00 GMT 2025",
      "grantType": "Grant",
      "id": "1B0SB000000Eiv0AE",
      "product": {
        "id": "01tSB000006XmtqYAG"
      },
      "quantity": 100,
      "record": {
        "id": "02iSB000000IoETYA0"
      },
      "unitOfMeasure": {
        "id": "0hESB0000003yfp2AA"
      },
      "usageRefreshPolicy": {
        "id": "1BYSB00000011OH4AY",
        "negotiable": null
      },
      "usageRolloverPolicy": {
        "id": "1BVS0000000AlxJ4AS",
        "negotiable": null
      },
      "validityPeriodTerm": 1,
      "validityPeriodUnit": "Month"
    }
  ]
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
id	String	ID of the policy.	Big, 65.0	65.0
negotiable	String	Indicates whether the policy is negotiable. Valid values are: <ul style="list-style-type: none"> • Negotiable • Non-Negotiable 	Big, 65.0	65.0

Rate Adjustments

Output representation of the details of a rate adjustment.

JSON Example

```
"rateAdjustments": [
  {
```



```

    "fields": {},
    "lowerBound": 0.0,
    "name": null,
    "negotiatedRateAdjustmentId": null,
    "rateAdjustmentId": "1ENxx0000004C9BGAU",
    "rateAdjustmentType": "Percentage",
    "rateAdjustmentValue": 10.0,
    "tierUnitOfMeasure": "USD",
    "upperBound": 50.0
  }
]

```

If the `negotiable` property value that's associated with a rate card entry is blank, then the data is derived from Product Catalog Management. If it isn't blank, then the data is derived from Rate Management.

Property Name	Type	Description	Filter Group and Version	Available Version
<code>fields</code>	Map<String, Fields Response >	List of optional fields and their values that belong to the rate adjustment object.	Big, 63.0	63.0
<code>lowerBound</code>	Double	Minimum quantity for the adjustment to be applicable.	Small, 63.0	63.0
<code>name</code>	String	Name of the tier.	Small, 63.0	63.0
<code>negotiatedRateAdjustmentId</code>	String	ID of the negotiated rate adjustment.	Small, 63.0	63.0
<code>rateAdjustmentId</code>	String	ID of the rate adjustment.	Small, 63.0	63.0
<code>rateAdjustmentType</code>	String	Type of the rate adjustment.	Small, 63.0	63.0
<code>rateAdjustmentValue</code>	Double	Value of the rate adjustment.	Small, 63.0	63.0
<code>tierUnitOfMeasure</code>	String	Unit of measure representing the tier.	Small, 63.0	63.0
<code>upperBound</code>	Double	Maximum quantity for the adjustment to be applicable.	Small, 63.0	63.0

Rate Card Entry

Output representation of the details of a rate card entry.

JSON Example

```

{
  "records": [
    {
      "bindingInstanceTargetType": "Product",
      "bindingInstanceType": "Target",

```

```

"chargeForOverages": "Yes",
"fields": {},
"isOptional": false,
"name": "Paddle Board",
"negotiable": "Negotiable,Non-Negotiable",
"negotiatedRate": 20,
"negotiatedRateCardEntryId": "1ELxx0000004C9JGAU,1ELxx0000004C9KGAU",
"quantity": 15,
"rate": 5,
"rateAdjustments": [
  {
    "fields": {},
    "lowerBound": 0,
    "name": "Tier 1",
    "negotiatedRateAdjustmentId": "1ENxx0000004C9BGAU",
    "rateAdjustmentId": "1ENxx0000004C9BGAU",
    "rateAdjustmentType": "Percentage",
    "rateAdjustmentValue": 10,
    "tierUnitOfMeasure": "USD",
    "upperBound": 50
  }
],
"rateCardEntryId": "1CJxx0000004C9IGA U,1CJxx0000004C9JGAU",
"rateUnitOfMeasureName": "USD",
"unitOfMeasure": "GB",
"usageResourceGrantAndPolicyDetail": {
  "grantDetail": {
    "grantType": "Grant",
    "id": "1BXxx0000004C91GAE",
    "quantity": 100,
    "usageGrantNegotiable": "Negotiable",
    "usageRefreshPolicy": {
      "id": "1BYxx0000004C92GAE",
      "negotiable": "Non-Negotiable"
    },
    "usageRolloverPolicy": {
      "id": "1BVxx0000004C93GAE",
      "negotiable": "Non-Negotiable"
    },
    "validityPeriodTerm": 1,
    "validityPeriodUnit": "Month"
  },
  "negotiatedGrantDetail": {
    "grantType": "Grant",
    "id": "1X6xx00000000OECAY",
    "quantity": 100,
    "usageGrantNegotiable": "Negotiable",
    "usageRefreshPolicy": {
      "id": "1BYxx0000004C92GAE",
      "negotiable": "Non-Negotiable"
    },
    "usageRolloverPolicy": {
      "id": "1BVxx0000004C93GAE",
      "negotiable": "Non-Negotiable"
    }
  }
}

```

```

    },
    "validityPeriodTerm": 1,
    "validityPeriodUnit": "Month"
  },
  "negotiatedResourcePolicyDetail": {
    "id": "1X5xx000000000ECAY",
    "ratingFrequencyPolicy": {
      "id": null,
      "negotiable": null
    },
    "usageAggregationPolicy": {
      "id": null,
      "negotiable": null
    },
    "usageCommitmentPolicy": {
      "id": "7Pexx0000004C92CAE",
      "negotiable": "Non-Negotiable"
    },
    "usageOveragePolicy": {
      "id": null,
      "negotiable": null
    }
  },
  "resourcePolicyDetail": {
    "id": "7Suxx0000004C9kCAE",
    "ratingFrequencyPolicy": {
      "id": null,
      "negotiable": null
    },
    "usageAggregationPolicy": {
      "id": null,
      "negotiable": null
    },
    "usageCommitmentPolicy": {
      "id": "7Pexx0000004C92CAE",
      "negotiable": "Non-Negotiable"
    },
    "usageOveragePolicy": {
      "id": null,
      "negotiable": null
    }
  },
  "usageResourceId": "1BRxx0000004C9CGAU"
}
]
}

```

If the `negotiable` property value is blank, then the data is derived from Product Catalog Management. If it isn't blank, then the data is derived from Rate Management.

Property Name	Type	Description	Filter Group and Version	Available Version
bindingInstanceTargetType	String	Type of the target object that's associated with this transaction.	Big, 63.0	63.0
bindingInstanceType	String	Type of the binding instance. Valid values are: <ul style="list-style-type: none"> • Self • Target 	Big, 63.0	63.0
chargeForOverages	String	Specifies whether overage is permitted. Valid values are: <ul style="list-style-type: none"> • Yes • No • NA 	Big, 63.0	63.0
fields	Map<String, Fields Response >	List of optional fields and their values that's associated with the rate card entry object.	Big, 63.0	63.0
isOptional	Boolean	Indicates whether the product usage resource is optional when the associated product is one of the commitment usage model types (<code>true</code>) or not (<code>false</code>).	Big, 65.0	65.0
name	String	Name of the resource.	Big, 63.0	63.0
negotiable	String	Type of the base rate and the tier rate, if applicable. Valid values are: <ul style="list-style-type: none"> • Negotiable • Non-Negotiable 	Big, 63.0	63.0
negotiatedRate	Double	User-overridden overage rate.	Big, 63.0	63.0
negotiatedRateCardEntryId	String	ID of the negotiated rate card entry and the tier rate card entry, if applicable.	Big, 63.0	63.0
quantity	Double	Amount granted for the resource.	Big, 63.0	63.0
rate	Double	Base overage rate.	Big, 63.0	63.0
rateAdjustments	Rate Adjustments []	List of tiers associated with the rate card entry, if applicable.	Big, 63.0	63.0
rateCardEntryId	String	ID of the base rate card entry and the tier rate card entry, if applicable.	Big, 63.0	63.0

Property Name	Type	Description	Filter Group and Version	Available Version
rateUnit OfMeasureName	String	Unit of measure for rates in the rate card entry.	Big, 64.0	64.0
unitOfMeasure	String	Unit of measure of the grant. For example, Unit.	Big, 63.0	63.0
usageResource Id	String	ID of the usage resource.	Big, 65.0	65.0
usageResource GrantAndPolicy Detail	Usage Resource Grant And Policy Detail	Details of a usage resource grant and policy.	Big, 65.0	65.0

Resource Policy Detail

Output representation of the details of a usage resource policy.

Property Name	Type	Description	Filter Group and Version	Available Version
id	String	ID of the usage resource policy.	Big, 65.0	65.0
ratingFrequency Policy	Policy Detail	Details of the rating frequency policy.	Big, 65.0	65.0
usageAggregation Policy	Policy Detail	Details of the usage aggregation policy.	Big, 65.0	65.0
usageCommitment Policy	Policy Detail	Details of the usage commitment policy.	Big, 65.0	65.0
usageOverage Policy	Policy Detail	Details of the usage overage policy.	Big, 65.0	65.0

Usage Details

Output representation of the usage details of a quote, an order, or an asset.

JSON example

This sample response shows resources that include grants, if applicable, and resources without rates when you retrieve the usage details of an order item.

```
{
  "records": [
    {
      "bindingInstanceTargetType": null,
      "bindingInstanceType": null,
      "chargeForOverages": "Yes",
      "isOptional": false,
      "fields": {}
    }
  ]
}
```

```

"name": "API Calls",
"negotiable": ",",
"negotiatedRate": null,
"negotiatedRateCardEntryId": ",",
"quantity": 1000,
"rate": null,
"rateAdjustments": [],
"rateCardEntryId": ",",
"rateUnitOfMeasureName": "USD",
"unitOfMeasure": null,
"usageResourceGrantAndPolicyDetail": {
  "grantDetail": {
    "grantType": "Grant",
    "id": "1BXxx0000004C91GAE",
    "quantity": 100,
    "usageGrantNegotiable": "Negotiable",
    "usageRefreshPolicy": {
      "id": "1BYxx0000004C92GAE",
      "negotiable": "Non-Negotiable"
    },
    "usageRolloverPolicy": {
      "id": "1BVxx0000004C93GAE",
      "negotiable": "Non-Negotiable"
    },
    "validityPeriodTerm": 1,
    "validityPeriodUnit": "Month"
  },
  "negotiatedGrantDetail": {
    "grantType": "Grant",
    "id": "1X6xx000000000ECAY",
    "quantity": 100,
    "usageGrantNegotiable": "Negotiable",
    "usageRefreshPolicy": {
      "id": "1BYxx0000004C92GAE",
      "negotiable": "Non-Negotiable"
    },
    "usageRolloverPolicy": {
      "id": "1BVxx0000004C93GAE",
      "negotiable": "Non-Negotiable"
    },
    "validityPeriodTerm": 1,
    "validityPeriodUnit": "Month"
  },
  "negotiatedResourcePolicyDetail": {
    "id": "1X5xx000000000ECAY",
    "ratingFrequencyPolicy": {
      "id": null,
      "negotiable": null
    },
    "usageAggregationPolicy": {
      "id": null,
      "negotiable": null
    },
    "usageCommitmentPolicy": {

```

```

        "id": "7Pexx0000004C92CAE",
        "negotiable": "Non-Negotiable"
    },
    "usageOveragePolicy": {
        "id": null,
        "negotiable": null
    }
},
"resourcePolicyDetail": {
    "id": "7Suxx0000004C9kCAE",
    "ratingFrequencyPolicy": {
        "id": null,
        "negotiable": null
    },
    "usageAggregationPolicy": {
        "id": null,
        "negotiable": null
    },
    "usageCommitmentPolicy": {
        "id": "7Pexx0000004C92CAE",
        "negotiable": "Non-Negotiable"
    },
    "usageOveragePolicy": {
        "id": null,
        "negotiable": null
    }
}
},
"usageResourceId": "1BRxx0000004C9CGAU"
}
]
}

```

This example shows a sample response without negotiated rates when you retrieve the usage details of an order item.

```

{
  "records": [
    {
      "bindingInstanceTargetType": "Product",
      "bindingInstanceType": "Target",
      "chargeForOverages": "Yes",
      "isOptional": false,
      "fields": {},
      "name": "Paddle Board",
      "negotiable": "Negotiable,Non-Negotiable",
      "negotiatedRate": null,
      "negotiatedRateCardEntryId": ",",
      "quantity": 15,
      "rate": 5,
      "rateAdjustments": [
        {
          "fields": {},
          "lowerBound": 0,
          "name": null,
          "negotiatedRateAdjustmentId": null,

```

```

        "rateAdjustmentId": "1ENxx0000004C9BGAU",
        "rateAdjustmentType": "Percentage",
        "rateAdjustmentValue": 10,
        "tierUnitOfMeasure": "USD",
        "upperBound": 50
    }
],
"rateCardEntryId": "1CJxx0000004C9IGA U,1CJxx0000004C9JGAU",
"rateUnitOfMeasureName": "USD",
"unitOfMeasure": "GB",
"usageResourceGrantAndPolicyDetail": {
    "grantDetail": {
        "grantType": "Grant",
        "id": "1BXxx0000004C91GAE",
        "quantity": 100,
        "usageGrantNegotiable": "Negotiable",
        "usageRefreshPolicy": {
            "id": "1BYxx0000004C92GAE",
            "negotiable": "Non-Negotiable"
        },
        "usageRolloverPolicy": {
            "id": "1BVxx0000004C93GAE",
            "negotiable": "Non-Negotiable"
        },
        "validityPeriodTerm": 1,
        "validityPeriodUnit": "Month"
    },
    "negotiatedGrantDetail": {
        "grantType": "Grant",
        "id": "1X6xx000000000ECA Y",
        "quantity": 100,
        "usageGrantNegotiable": "Negotiable",
        "usageRefreshPolicy": {
            "id": "1BYxx0000004C92GAE",
            "negotiable": "Non-Negotiable"
        },
        "usageRolloverPolicy": {
            "id": "1BVxx0000004C93GAE",
            "negotiable": "Non-Negotiable"
        },
        "validityPeriodTerm": 1,
        "validityPeriodUnit": "Month"
    },
    "negotiatedResourcePolicyDetail": {
        "id": "1X5xx000000000ECA Y",
        "ratingFrequencyPolicy": {
            "id": null,
            "negotiable": null
        },
        "usageAggregationPolicy": {
            "id": null,
            "negotiable": null
        },
        "usageCommitmentPolicy": {

```



```

        "id": "7Pexx0000004C92CAE",
        "negotiable": "Non-Negotiable"
    },
    "usageOveragePolicy": {
        "id": null,
        "negotiable": null
    }
},
"resourcePolicyDetail": {
    "id": "7Suxx0000004C9kCAE",
    "ratingFrequencyPolicy": {
        "id": null,
        "negotiable": null
    },
    "usageAggregationPolicy": {
        "id": null,
        "negotiable": null
    },
    "usageCommitmentPolicy": {
        "id": "7Pexx0000004C92CAE",
        "negotiable": "Non-Negotiable"
    },
    "usageOveragePolicy": {
        "id": null,
        "negotiable": null
    }
}
},
"usageResourceId": "1BRxx0000004C9CGAU"
}
]
}

```

This sample response shows negotiated rates when you retrieve the usage details of an order item. The negotiated rates are derived from these objects for assets, order items, or quote line items.

- AssetRateCardEntry
- AssetRateAdjustment
- OrderItemRateCardEntry
- OrderItemRateAdjustment
- QuoteLineRateCardEntry
- QuoteLineRateAdjustment

```

{
  "records": [
    {
      "bindingInstanceTargetType": "Product",
      "bindingInstanceType": "Target",
      "chargeForOverages": "Yes",
      "isOptional": false,
      "fields": {},
      "name": "Paddle Board",
      "negotiable": "Negotiable,Non-Negotiable",
    }
  ]
}

```

```

"negotiatedRate": 20,
"negotiatedRateCardEntryId": "1ELxx0000004C9JGAU,1ELxx0000004C9KGAU",
"quantity": 15,
"rate": 5,
"rateAdjustments": [
  {
    "fields": {},
    "lowerBound": 0,
    "name": "Tier 1",
    "negotiatedRateAdjustmentId": "1ENxx0000004C9BGAU",
    "rateAdjustmentId": "1ENxx0000004C9BGAU",
    "rateAdjustmentType": "Percentage",
    "rateAdjustmentValue": 10,
    "tierUnitOfMeasure": "USD",
    "upperBound": 50
  }
],
"rateCardEntryId": "1CJxx0000004C9IGA U,1CJxx0000004C9JGAU",
"rateUnitOfMeasureName": "USD",
"unitOfMeasure": "GB",
"usageResourceGrantAndPolicyDetail": {
  "grantDetail": {
    "grantType": "Grant",
    "id": "1BXxx0000004C91GAE",
    "quantity": 100,
    "usageGrantNegotiable": "Negotiable",
    "usageRefreshPolicy": {
      "id": "1BYxx0000004C92GAE",
      "negotiable": "Non-Negotiable"
    },
    "usageRolloverPolicy": {
      "id": "1BVxx0000004C93GAE",
      "negotiable": "Non-Negotiable"
    },
    "validityPeriodTerm": 1,
    "validityPeriodUnit": "Month"
  },
  "negotiatedGrantDetail": {
    "grantType": "Grant",
    "id": "1X6xx00000000E CAY",
    "quantity": 100,
    "usageGrantNegotiable": "Negotiable",
    "usageRefreshPolicy": {
      "id": "1BYxx0000004C92GAE",
      "negotiable": "Non-Negotiable"
    },
    "usageRolloverPolicy": {
      "id": "1BVxx0000004C93GAE",
      "negotiable": "Non-Negotiable"
    },
    "validityPeriodTerm": 1,
    "validityPeriodUnit": "Month"
  },
  "negotiatedResourcePolicyDetail": {

```

```

    "id": "1X5xx000000000ECAY",
    "ratingFrequencyPolicy": {
      "id": null,
      "negotiable": null
    },
    "usageAggregationPolicy": {
      "id": null,
      "negotiable": null
    },
    "usageCommitmentPolicy": {
      "id": "7Pexx0000004C92CAE",
      "negotiable": "Non-Negotiable"
    },
    "usageOveragePolicy": {
      "id": null,
      "negotiable": null
    }
  },
  "resourcePolicyDetail": {
    "id": "7Suxx0000004C9kCAE",
    "ratingFrequencyPolicy": {
      "id": null,
      "negotiable": null
    },
    "usageAggregationPolicy": {
      "id": null,
      "negotiable": null
    },
    "usageCommitmentPolicy": {
      "id": "7Pexx0000004C92CAE",
      "negotiable": "Non-Negotiable"
    },
    "usageOveragePolicy": {
      "id": null,
      "negotiable": null
    }
  }
},
"usageResourceId": "1BRxx0000004C9CGAU"
}
]
}

```

This sample response shows details of the custom fields when you retrieve the usage details of an order item.

```

{
  "records": [
    {
      "fields": {
        "MyCustomDate__c": {
          "displayValue": "2024-09-24",
          "value": "2024-09-24T17:46:30.662Z"
        },
        "MyCustomNumber__c": {
          "displayValue": "20.0",

```

```

        "value": 20
      }
    },
    "isOptional": false,
    "bindingInstanceTargetType": "Product",
    "bindingInstanceType": "Target",
    "chargeForOverages": "Yes",
    "name": "Therapy",
    "negotiable": "Negotiable,Non-Negotiable",
    "negotiatedRate": 20,
    "negotiatedRateCardEntryId": "1ELxx0000004C9JGAU,1ELxx0000004C9KGAU",
    "quantity": 15,
    "rate": 5,
    "rateAdjustments": [
      {
        "fields": {
          "MyCustomString__c": {
            "displayValue": "My Custom String",
            "value": "MyCustomString"
          }
        }
      },
      {
        "lowerBound": 0,
        "name": "Tier 1",
        "negotiatedRateAdjustmentId": "1ENxx0000004C9BGAU",
        "rateAdjustmentId": "1ENxx0000004C9BGAU",
        "rateAdjustmentType": "Percentage",
        "rateAdjustmentValue": 10,
        "tierUnitOfMeasure": "USD",
        "upperBound": 50
      }
    ],
    "rateCardEntryId": "1CJxx0000004C9IGA U,1CJxx0000004C9JGAU",
    "rateUnitOfMeasureName": "USD",
    "unitOfMeasure": "GB",
    "usageResourceGrantAndPolicyDetail": {
      "grantDetail": {
        "grantType": "Grant",
        "id": "1BXxx0000004C91GAE",
        "quantity": 100,
        "usageGrantNegotiable": "Negotiable",
        "usageRefreshPolicy": {
          "id": "1BYxx0000004C92GAE",
          "negotiable": "Non-Negotiable"
        },
        "usageRolloverPolicy": {
          "id": "1BVxx0000004C93GAE",
          "negotiable": "Non-Negotiable"
        },
        "validityPeriodTerm": 1,
        "validityPeriodUnit": "Month"
      },
      "negotiatedGrantDetail": {
        "grantType": "Grant",
        "id": "1X6xx000000000ECAY",

```

```
    "quantity": 100,
    "usageGrantNegotiable": "Negotiable",
    "usageRefreshPolicy": {
      "id": "1BYxx0000004C92GAE",
      "negotiable": "Non-Negotiable"
    },
    "usageRolloverPolicy": {
      "id": "1BVxx0000004C93GAE",
      "negotiable": "Non-Negotiable"
    },
    "validityPeriodTerm": 1,
    "validityPeriodUnit": "Month"
  },
  "negotiatedResourcePolicyDetail": {
    "id": "1X5xx00000000ECAY",
    "ratingFrequencyPolicy": {
      "id": null,
      "negotiable": null
    },
    "usageAggregationPolicy": {
      "id": null,
      "negotiable": null
    },
    "usageCommitmentPolicy": {
      "id": "7Pexx0000004C92CAE",
      "negotiable": "Non-Negotiable"
    },
    "usageOveragePolicy": {
      "id": null,
      "negotiable": null
    }
  },
  "resourcePolicyDetail": {
    "id": "7Suxx0000004C9kCAE",
    "ratingFrequencyPolicy": {
      "id": null,
      "negotiable": null
    },
    "usageAggregationPolicy": {
      "id": null,
      "negotiable": null
    },
    "usageCommitmentPolicy": {
      "id": "7Pexx0000004C92CAE",
      "negotiable": "Non-Negotiable"
    },
    "usageOveragePolicy": {
      "id": null,
      "negotiable": null
    }
  }
},
"usageResourceId": "1BRxx0000004C9CGAU"
}
```

```
]
}
```

This sample response shows values for the type and target type of a binding instance if the `BindingInstanceTargetId` value is available in the `QuoteLineItem`, `OrderItem`, and `AssetStatePeriod` objects. Additionally, the rate, negotiated rates, and rate card entry values show the associated details of the binding object.

```
{
  "records": [
    {
      "bindingInstanceTargetType": "Account",
      "bindingInstanceType": "Target",
      "chargeForOverages": "Yes",
      "fields": {},
      "isOptional": false,
      "name": "Data Transfers",
      "negotiable": "Non-Negotiable,Non-Negotiable",
      "negotiatedRate": null,
      "negotiatedRateCardEntryId": "1QNxx0000004CQmGAM,1QNxx0000004CLwGAM",
      "quantity": 250,
      "rate": 0.098765,
      "rateAdjustments": [
        {
          "fields": {},
          "lowerBound": 0,
          "name": null,
          "negotiatedRateAdjustmentId": null,
          "rateAdjustmentId": "1Soxx0000004CAeCAM",
          "rateAdjustmentType": "Percentage",
          "rateAdjustmentValue": 0,
          "tierUnitOfMeasure": "USD",
          "upperBound": 121
        }
      ],
      "rateCardEntryId": "1CJxx0000004C9CGAU,1CJxx0000004C9GGAU",
      "rateUnitOfMeasureName": "USD",
      "unitOfMeasure": "GB",
      "usageResourceGrantAndPolicyDetail": {
        "grantDetail": {
          "grantType": "Grant",
          "id": "1BXxx0000004C91GAE",
          "quantity": 100,
          "usageGrantNegotiable": "Negotiable",
          "usageRefreshPolicy": {
            "id": "1BYxx0000004C92GAE",
            "negotiable": "Non-Negotiable"
          },
          "usageRolloverPolicy": {
            "id": "1BVxx0000004C93GAE",
            "negotiable": "Non-Negotiable"
          },
          "validityPeriodTerm": 1,
          "validityPeriodUnit": "Month"
        },
        "negotiatedGrantDetail": {
```

```
    "grantType": "Grant",
    "id": "1X6xx000000000ECAY",
    "quantity": 100,
    "usageGrantNegotiable": "Negotiable",
    "usageRefreshPolicy": {
      "id": "1BYxx0000004C92GAE",
      "negotiable": "Non-Negotiable"
    },
    "usageRolloverPolicy": {
      "id": "1BVxx0000004C93GAE",
      "negotiable": "Non-Negotiable"
    },
    "validityPeriodTerm": 1,
    "validityPeriodUnit": "Month"
  },
  "negotiatedResourcePolicyDetail": {
    "id": "1X5xx000000000ECAY",
    "ratingFrequencyPolicy": {
      "id": null,
      "negotiable": null
    },
    "usageAggregationPolicy": {
      "id": null,
      "negotiable": null
    },
    "usageCommitmentPolicy": {
      "id": "7Pexx0000004C92CAE",
      "negotiable": "Non-Negotiable"
    },
    "usageOveragePolicy": {
      "id": null,
      "negotiable": null
    }
  },
  "resourcePolicyDetail": {
    "id": "7Suxx0000004C9kCAE",
    "ratingFrequencyPolicy": {
      "id": null,
      "negotiable": null
    },
    "usageAggregationPolicy": {
      "id": null,
      "negotiable": null
    },
    "usageCommitmentPolicy": {
      "id": "7Pexx0000004C92CAE",
      "negotiable": "Non-Negotiable"
    },
    "usageOveragePolicy": {
      "id": null,
      "negotiable": null
    }
  }
},
```

```

    "usageResourceId": "1BRxx0000004C9CGAU"
  }
]
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
errors	Usage Detail Error Response []	List of errors encountered during the processing of the API request.	Small, 63.0	63.0
records	Rate Card Entry []	List of rate card entry records.	Small, 63.0	63.0

Usage Details Error Response

Output representation of the details of an error related to usage details.

JSON Example

```

{
  "errors": [
    {
      "referenceId": "MyOrderItem",
      "errorCode": "INVALID_API_INPUT",
      "message": "Something has failed"
    }
  ]
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
errorCode	String	Code associated with the error.	Small, 63.0	63.0
message	String	Message associated with the error.	Small, 63.0	63.0
referenceId	String	Unique ID that's associated with the specific error for tracking and reference purposes.	Small, 63.0	63.0

Usage Resource Grant And Policy Detail

Output representation of the details of a usage resource grant and policy.

JSON Example

```

{
  "usageResourceGrantAndPolicyDetail": {
    "grantDetail": {
      "grantType": "Grant",
      "id": "1BXxx0000004C91GAE",
      "quantity": 100,
      "usageGrantNegotiable": "Negotiable",
      "usageRefreshPolicy": {

```



```
        "id": "1BYxx0000004C92GAE",
        "negotiable": "Non-Negotiable"
    },
    "usageRolloverPolicy": {
        "id": "1BVxx0000004C93GAE",
        "negotiable": "Non-Negotiable"
    },
    "validityPeriodTerm": 1,
    "validityPeriodUnit": "Month"
},
"negotiatedGrantDetail": {
    "grantType": "Grant",
    "id": "1X6xx000000000ECCAY",
    "quantity": 100,
    "usageGrantNegotiable": "Negotiable",
    "usageRefreshPolicy": {
        "id": "1BYxx0000004C92GAE",
        "negotiable": "Non-Negotiable"
    },
    "usageRolloverPolicy": {
        "id": "1BVxx0000004C93GAE",
        "negotiable": "Non-Negotiable"
    },
    "validityPeriodTerm": 1,
    "validityPeriodUnit": "Month"
},
"negotiatedResourcePolicyDetail": {
    "id": "1X5xx000000000ECCAY",
    "ratingFrequencyPolicy": {
        "id": null,
        "negotiable": null
    },
    "usageAggregationPolicy": {
        "id": null,
        "negotiable": null
    },
    "usageCommitmentPolicy": {
        "id": "7Pexx0000004C92CAE",
        "negotiable": "Non-Negotiable"
    },
    "usageOveragePolicy": {
        "id": null,
        "negotiable": null
    }
},
"resourcePolicyDetail": {
    "id": "7Suxx0000004C9kCAE",
    "ratingFrequencyPolicy": {
        "id": null,
        "negotiable": null
    },
    "usageAggregationPolicy": {
        "id": null,
        "negotiable": null
    }
}
```

```

    },
    "usageCommitmentPolicy": {
      "id": "7Pexx0000004C92CAE",
      "negotiable": "Non-Negotiable"
    },
    "usageOveragePolicy": {
      "id": null,
      "negotiable": null
    }
  }
}
}
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
grantDetail	Grant Detail	Details about the grants from the ProductUsageGrant object.	Big, 65.0	65.0
negotiatedGrantDetail	Grant Detail	Details about the negotiated grants from the LineltemUsageResourceGrant or TransactionUsageEntitlement object.	Big, 65.0	65.0
negotiatedResourcePolicyDetail	Resource Policy Detail	Details about the policy from the LineltemUsageResourcePolicy or BindingObjectUsageResourcePolicy object.	Big, 65.0	65.0
resourcePolicyDetail	Resource Policy Detail	Details about the policy from the ProductUsageResourcePolicy object.	Big, 65.0	65.0

Usage Management Metadata API Types

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

[Flow for Usage Management](#)

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

[IndustriesUsageSettings](#)

Represents the settings for Usage Management.

SEE ALSO:

[Metadata API Developer Guide: Understanding Metadata API](#)

Flow for Usage Management

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

FlowActionCall

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

Field Name	Field Type	Description
<code>actionType</code>	<code>InvokableActionType</code> (enumeration of type string)	<p>Required.</p> <p>The action type. Additional valid values only for Usage Management include:</p> <ul style="list-style-type: none"> <code>invokeSummaryCreationService</code>—Invoke the service that creates various summaries, such as usage, ratable, and liable summaries where the usage amount is zero. The service also checks and updates the billing period of the usage entitlement account if the billing period is expired. <code>processConsumptionOverages</code>—Process consumption overages for the usage summary records with <code>SummaryComplete</code> status. This action uses the entitlement service to process the overages. <code>refreshUsageEntitlementBucket</code>—Refresh entitlements by evaluating the usage entitlement bucket records and creating a new usage entitlement entry. <code>retriggerEntlCreaProc</code>—Retrigger entitlement creation process for failed or unprocessed assets.

IndustriesUsageSettings

Represents the settings for Usage Management.

Parent Type and Manifest Access

This type extends the [Metadata](#) metadata type and inherits its `fullName` field.

In the package manifest, all the settings metadata types for the org are accessed using the “Settings” name. See [Settings](#) for more details.

File Suffix and Directory Location

`IndustriesUsageSettings` values are stored in the `IndustriesUsage.settings` file in the `settings` folder. The `.settings` files are different from other named components, because there is only one settings file for each settings component.

Version

IndustriesUsageSettings components are available in API version 63.0 and later.

Fields

Field Name	Description
enableUsage	<p>Field Type boolean</p> <p>Description Indicates whether to create and access Usage Management objects to manage product usage and determine rates based on usage (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>

Declarative Metadata Sample Definition

The following is an example of an IndustriesUsageSettings component.

```
<?xml version="1.0" encoding="UTF-8"?>
<IndustriesUsageSettings xmlns="http://soap.sforce.com/2006/04/metadata">
  <enableUsage>true</enableUsage>
</IndustriesUsageSettings>
```

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>IndustriesUsage</members>
    <name>Settings</name>
  </types>
  <version>[fctest]</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](#).

CHAPTER 10 Billing

In this chapter ...

- [Billing Standard Objects](#)
- [Billing Fields on Standard Objects](#)
- [Salesforce Payments Objects in Billing](#)
- [Billing Platform Events](#)
- [Billing Standard Invocable Actions](#)
- [Billing Business APIs](#)
- [Billing Apex Reference](#)
- [Billing Metadata API Types](#)

Automate processes related to billing, credit application, and invoice generation. Generate billing schedules by using context service, and create invoices from a billing schedule.

SEE ALSO:

[Salesforce Help: Assign Permissions to Access Billing Features](#)

EDITIONS

Available in: Lightning Experience

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

Billing Standard Objects

The Billing data model provides objects and fields to manage billing and tax configurations, credit memos, and invoices, and accounting periods for legal entities.

[AccountingPeriod](#)

Represents information about a time period for which businesses prepare reports and analyze performance. Each billing transaction is associated with an accounting period. This object is available in API version 62.0 and later.

[BillingBatchScheduler](#)

Represents a scheduled processing job that triggers recurring invoice batch runs. This object is available in API version 62.0 and later.

[BillingBatchFilterCriteria](#)

Represents the filter that all eligible billing schedules must satisfy in order to be picked up by an invoice run. This object is available in API version 62.0 and later.

[BillingMilestonePlan](#)

Represents a structured approach to invoicing where invoices are scheduled based on predefined milestones. This object is available in API version 63.0 and later.

[BillingMilestonePlanItem](#)

Represents a specific billing milestone within the billing milestone plan that's used to manage and track billing based on the completion of certain deliverables or stages. This object is available in API version 63.0 and later.

[BillingPeriodItem](#)

Represents a payment period for an invoice. The billing period item is used to pass billing information to an invoice line. This object is available in API version 62.0 and later.

[BillingPolicy](#)

Represents information about a set of billing treatments that define the rules to invoice a customer for an order item. This object is available in API version 62.0 and later.

[BillingSchedule](#)

Represents information about the order item that's used in the invoicing process. This object is available in API version 62.0 and later.

[BillingScheduleGroup](#)

Represents a consolidated view of all the billing schedules related to the order items generated from one asset, including new orders and amendment orders. This object is available in API version 62.0 and later.

[BillingTreatment](#)

Represents information about the billing of an order item. This object is available in API version 62.0 and later.

[BillingTreatmentItem](#)

Represents information about allocation of the total amount of an order item to billing schedules throughout the order item's lifecycle. This object is available in API version 62.0 and later.

[BsgRelationship](#)

Represents a relationship between billing schedule groups to support bundles where one parent billing schedule group has multiple child billing schedule groups. This object is available in API version 62.0 and later.

[CreditMemo](#)

Represents a document that's used to reduce the amount that a buyer owes a seller under the terms of an earlier invoice. This object is available in API version 62.0 and later.

[CreditMemoAddressGroup](#)

Represents the storage of the buyer's address information, which is used to determine the tax credit amount for a buyer when a credit memo is issued. This object is available in API version 62.0 and later.

[CreditMemoInvApplication](#)

Represents information about the application of a credit memo to an invoice. This object is available in API version 62.0 and later.

[CreditMemoLine](#)

Represents the product, service, adjustment, or tax line items included in a credit memo. This object is available in API version 62.0 and later.

[CreditMemoLineInvoiceLine](#)

Represents a junction between a credit memo line and an invoice line. This object is available in API version 62.0 and later.

[CreditMemoLineTax](#)

Represents tax information of a credit memo line of type `Tax`. This object is available in API version 62.0 and later.

[DebitMemo](#)

Represents the document used to charge an additional amount to a buyer by a seller. An invoice is generated for the debit memo in the next invoice run. This object is available in API version 65.0 and later.

[DebitMemoAddress](#)

Represents the buyer's address information, which is used to determine the tax amount for a buyer when a debit memo is issued. This object is available in API version 65.0 and later.

[DebitMemoLine](#)

Represents the additional charge amount that the buyer must pay for the product, service, or debit memo line tax that's related to the debit memo. This object is available in API version 65.0 and later.

[GeneralLedgerAccount](#)

Represents information about the accounting codes, types, and names that are used to store and organize financial transactions. This object is available in API version 63.0 and later.

[GeneralLedgerAcctAsgntRule](#)

Represents information about the rule based on which general ledger accounts are assigned to transaction journals that are created for billing transactions. This object is available in API version 63.0 and later.

[GeneralLdgrAcctPrdSummary](#)

Represents a junction between a general ledger account and a legal entity accounting period. Stores information about the total credit amount, total debit amount, opening balance, and closing balance of a general ledger account for a specific legal entity accounting period. This object is available in API version 65.0 and later.

[GeneralLedgerJrnEntryRule](#)

Represents information about the transaction journal entry rule, based on which transaction journals are created for the selected credit and debit general ledger accounts, transaction amount field, and percentage. This object is available in API version 65.0 and later.

[InvBatchDraftToPostedRun](#)

Represents information about the batch job that posts all invoices with the status as `Draft` that are generated by the invoice batch run associated with the billing schedule. This object is available in API version 62.0 and later.

[Invoice](#)

Represents information about a financial document describing the total amount a buyer must pay for provided products or services. This object is available in API version 62.0 and later.

[InvoiceAddressGroup](#)

Represents the storage of the buyer's address information. This object is available in API version 62.0 and later.

[InvoiceBatchRun](#)

Represents a batch processing job in Billing. During an invoice batch run, all billing schedules that meet the specified criteria are processed, resulting in the generation of invoices. This object is available in API version 62.0 and later.

[InvoiceBatchRunCriteria](#)

Represents a batch processing job and its required criteria in Billing. During an invoice batch run, all billing schedules that meet the specified criteria are processed, resulting in the generation of invoices. This object is available in API version 62.0 and later.

[InvoiceBatchRunRecovery](#)

Represents information about the recovery procedure of an invoice batch run. This object is available in API version 62.0 and later.

[InvoiceDocument](#)

Represents the PDF document generated for an invoice. This object is available in API version 63.0 and later.

[InvoiceLine](#)

Represents the amount that a buyer must pay for a product, service, or fee. Invoice lines are created based on the amount of an order line. This object is available in API version 62.0 and later.

[InvoiceLineRelationship](#)

Represents a relationship between invoice line items to support bundles where one parent invoice line has multiple child invoice lines. This object is available in API version 62.0 and later.

[InvoiceLineTax](#)

Represents tax information of an invoice line of type `Tax`. This object is available in API version 62.0 and later.

[LegalEntity](#)

Represents the way an organization is structured. An organization can be a single legal entity or it can comprise more than one legal entity. This object is available in API version 62.0 and later.

[LegalEntyAccountingPeriod](#)

Represents a junction between a legal entity and an accounting period. This object is available in API version 62.0 and later.

[PaymentBatchRun](#)

Represents a batch processing job that processes payments in Billing. During a payment batch run, all the payment schedules that meet the specified criteria are processed and the corresponding Payment records are created. These payments are then applied to invoices or invoice lines. This object is available in API version 64.0 and later.

[PaymentLineInvoiceLine](#)

Represents information about a payment line that's applied to or unapplied from an invoice line. This object is available in API version 64.0 and later.

[PaymentSchedule](#)

Represents information about a set of payments that a customer wants to collect at different times for a certain record. A schedule contains one or more payment schedule items, where each item represents one payment to be processed. Each of a schedule's items can have different payment configuration fields, such as payment methods, payment dates, and payment accounts. When a payment scheduler launches a payment run, the run evaluates active payment schedule items, and picks them up for payment processing if they match the scheduler's payment criteria. This object is available in API version 64.0 and later.

[PaymentSchedulePolicy](#)

Represents information about the configuration for the payment schedule. This object is available in API version 64.0 and later.

[PaymentScheduleTreatment](#)

Represents information about the processing of payment schedules including the payment method and the payment amount for the payment schedule. This object is available in API version 64.0 and later.

[PaymentScheduleTreatmentDtl](#)

Represents information about the processing of payment schedules after the corresponding invoices are posted. This object is available in API version 64.0 and later.

[PymtSchdDistributionMethod](#)

Represents information about the partial payments that the total payment is divided into. This object is available in API version 64.0 and later.

[PaymentScheduleItem](#)

Represents information about a payment to be processed. Each schedule item can have different payment configuration fields, such as payment methods, payment dates, and payment accounts. When a payment scheduler launches a payment run, the run evaluates active payment schedule items, and picks them up for payment processing if they match the scheduler's payment criteria. This object is available in API version 64.0 and later.

[PaymentTerm](#)

Represents an agreement between a buyer and a seller about when payment is due for an invoice. This object is available in API version 62.0 and later.

[PaymentTermItem](#)

Represents configuration of a payment term. This object is available in API version 62.0 and later.

[RevenueTransactionErrorLog](#)

Represents the details of errors that occurred during the processing of a request. The error record persists until a new error with the same category, primary record, and, if necessary, related record occurs. This object is available in API version 62.0 and later.

[SeqPolicySelectionCondition](#)

Represents the condition used to determine which sequence policy is applied to a record. This object is available in API version 65.0 and later.

[SequenceGapReconciliation](#)

Represents a missing sequence value identified during reconciliation, which can be used later to ensure there are no gaps in the sequence policy numbers. This object is available in API version 65.0 and later.

[SequencePolicy](#)

Represents the configuration of rules and parameters for generating unique, sequential numbers for records. Stores settings such as numbering patterns, prefixes, suffixes, sequence start numbers, increment values, and filter criteria to ensure accurate and compliant numbering. This object is available in API version 65.0 and later.

[TaxEngine](#)

Represents information about an instance of a tax engine provider as well as the merchant credentials for that specific instance. This object is available in API version 62.0 and later.

[TaxEngineInteractionLog](#)

Represents a record of a communication with an external tax engine following a tax calculation request. This object is available in API version 62.0 and later.

[TaxEngineProvider](#)

Represents general information about a service that manages a tax engine. Tax engine providers have a one-to-many relationship with tax engines, where the tax engine record represents a specific configuration of a tax engine that can be assigned to multiple order items. This object is available in API version 62.0 and later.

[TaxPolicy](#)

Represents information about a group of tax treatments, where each treatment represents parameters to determine how a particular product is taxed for a transaction line item. Tax policies are related to products, which pass the policy on to the resulting order items and in turn the billing schedules. This object is available in API version 62.0 and later.

[TaxTreatment](#)

Represents information about tax calculation by external engines. Each product requires a tax policy to determine whether to apply tax. Each tax policy requires at least one tax treatment. The tax treatments determine how taxable products are taxed. This object is available in API version 62.0 and later.

SEE ALSO:

[Object Reference for the Salesforce Platform: Overview of Salesforce Objects and Fields](#)

[SOAP API Developer Guide: Introduction to SOAP API](#)

AccountingPeriod

Represents information about a time period for which businesses prepare reports and analyze performance. Each billing transaction is associated with an accounting period. 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

You need the Accounts Receivables Admin permission set to access this object.

Fields

Field	Details
EndDate	<p>Type date</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. The end date of an accounting period.</p>
FinancialYear	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. The financial year in which an accounting period falls.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	<p>Description</p> <p>The timestamp when the current user last accessed an accounting period indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type</p> <p>dateTime</p> <p>Properties</p> <p>Filter, Nillable, Sort</p> <p>Description</p> <p>The timestamp when the current user last viewed an accounting period. If this value is null, it's possible that the user only accessed the accounting period or a related list view (LastReferencedDate), but not viewed the accounting period itself.</p>
Name	<p>Type</p> <p>string</p> <p>Properties</p> <p>Create, Filter, Group, idLookup, Sort, Update</p> <p>Description</p> <p>Required. The auto-generated name of an accounting period. The name is a combination of the accounting period's start date, start month, end date, and end month.</p>
OwnerId	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description</p> <p>Required. The user who owns an Accounting Period record.</p> <p>This field is a polymorphic relationship field.</p> <p>Relationship Name</p> <p>Owner</p> <p>Refers To</p> <p>Group, User</p>
StartDate	<p>Type</p> <p>date</p> <p>Properties</p> <p>Create, Filter, Group, Sort, Update</p> <p>Description</p> <p>Required. The start date of an accounting period.</p>
Status	<p>Type</p> <p>picklist</p>

Field	Details
	<p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Required. The status of an accounting period.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • Closed • Open
TotalAssetsAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The sum of all the assets from legal entity accounting periods associated with the accounting period. This field is available in API version 65.0 and later.</p>
TotalEquitiesAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The sum of all the equities from legal entity accounting periods associated with the accounting period. This field is available in API version 65.0 and later.</p>
TotalExpensesAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The sum of all the expenses from legal entity accounting periods associated with the accounting period. This field is available in API version 65.0 and later.</p>
TotalLiabilitiesAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The sum of all the liabilities from legal entity accounting periods associated with the accounting period. This field is available in API version 65.0 and later.</p>
TotalRevenueAmount	<p>Type currency</p>

Field	Details
	<p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The sum of all the revenue from legal entity accounting periods associated with the accounting period. This field is available in API version 65.0 and later.</p>

Associated Objects

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

AccountingPeriodShare on page 2182

Sharing is available for the object.

AccountingPeriodFeed on page 2171

Feed tracking is available for the object.

AccountingPeriodHistory on page 2178

History is available for tracked fields of the object.

BillingBatchScheduler

Represents a scheduled processing job that triggers recurring invoice batch runs. This object is available in API version 62.0 and later.

Supported Calls

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

Special Access Rules

You need the Billing Admin permission set to access this object.

Fields

Field	Details
BillingSchedulerName	<p>Type string</p> <p>Properties Filter, Group, idLookup, Sort</p> <p>Description Required. The name of the scheduler.</p>
Comments	<p>Type textarea</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description Additional details about the billing batch scheduler.</p>
CronExpression	<p>Type string</p> <p>Properties Filter, Group, Sort</p> <p>Description Required. This field determines how often the scheduler recurs.</p>
EndDate	<p>Type date</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The date when the scheduler stops triggering batch processing jobs.</p>
FrequencyCadence	<p>Type picklist</p> <p>Properties Filter, Group, Restricted picklist, Sort</p> <p>Description Required. The frequency of the scheduler triggering the invoice batch run. Valid values are:</p> <ul style="list-style-type: none"> • <code>Daily</code>— The scheduled job recurs every day. • <code>Monthly</code>— The scheduled job recurs every month. • <code>Once</code>— The scheduled job occurs one time and doesn't recur. • <code>Weekly</code>— The scheduled job recurs every week.
FrequencyOptions	<p>Type textarea</p> <p>Properties Nillable</p> <p>Description This field is a derived field that stores the scheduler configuration.</p>
JobType	<p>Type picklist</p>

Field	Details
	<p>Properties Filter, Group, Restricted picklist, Sort</p> <p>Description Required. The type of batch processing job that the scheduler triggers. Valid value is <code>Invoice</code> for which the scheduler starts a batch invoice run.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed a billing batch scheduler record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed a billing batch scheduler record. If this value is null, it's possible that the user only accessed the billing batch scheduler record or a related list view (<code>LastReferencedDate</code>), but not viewed the billing batch scheduler record itself.</p>
NextRunTime	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date and timestamp of the next scheduled batch invoice run in the user's time zone.</p>
OwnerId	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description Required. The ID of the user who created the scheduler. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p>

Field	Details
	<p>Refers To Group, User</p>
RecurringSubType	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description The frequency at which the batch processing job recurs when the <code>FrequencyCadence</code> field value is set to <code>Monthly</code>. Valid values are:</p> <ul style="list-style-type: none"> • <code>Every</code>— The processing job recurs at every instance of the frequency of the value. For example, if the <code>RecurringSubType</code> field value is <code>Every</code> and the <code>FrequencyCadence</code> field value is <code>Weekly</code>, then the batch processing job recurs every week. • <code>SpecificDate</code>— The scheduler triggers the batch processing job on the selected date. For example, if the selected date is 5, and the <code>FrequencyCadence</code> field value is <code>Monthly</code>, then the job recurs on the fifth day of each month.
RecurringType	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description The frequency at which the batch processing job is repeated when the <code>FrequencyCadence</code> field value is set to <code>Weekly</code>. Valid value is <code>Every</code>.</p>
Recurson	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description The interval at which the scheduler triggers a batch processing job. If the <code>FrequencyCadence</code> field value is <code>Monthly</code>, you must select either the specific date or the interval when the schedule triggers the job. Valid values are:</p> <ul style="list-style-type: none"> • <code>First</code> • <code>Fourth</code> • <code>Last</code> • <code>Second</code>

Field	Details
	<ul style="list-style-type: none"> • <code>Third</code> <p>Example: To configure the scheduler to trigger the job on the first Monday of the month, set the following fields:</p> <ul style="list-style-type: none"> • <code>FrequencyCadence=Monthly</code> • <code>RecursOn=First</code> • <code>RecursOnDay= Monday</code>
<code>RecursOnDate</code>	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The date on which the scheduler triggers a batch processing job.</p> <p>Example: To configure the scheduler to trigger the job on the fifth day of the month, set the following fields:</p> <ul style="list-style-type: none"> • <code>FrequencyCadence=Monthly</code> • <code>RecursOnDate= 5</code> <p>Example: To configure the scheduler to trigger the job on the second to last day of the month, set the following fields:</p> <ul style="list-style-type: none"> • <code>FrequencyCadence=Monthly</code> • <code>RecursOnDate=SecondToLast</code> <p>If you select <code>Last</code>, <code>SecondToLast</code>, or <code>ThirdToLast</code>, the date of the batch processing job varies depending on the number of days in the month.</p> <p>For example, consider <code>SecondToLast</code> is selected. If the month has 30 days, such as June, then the batch processing job occurs on the 28th day. If the month has 31 days, such as July, then the batch processing job occurs on the 29th day.</p>
<code>RecursOnDay</code>	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description The day on which the scheduler triggers a batch processing job.</p> <p>If the <code>FrequencyCadence</code> field value is set to <code>Weekly</code>, then you must select the day when the scheduler runs. The scheduler recurs every week on the selected day; for example, weekly on Monday.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • <code>Sunday</code> • <code>Monday</code> • <code>Tuesday</code>

Field	Details
	<ul style="list-style-type: none"> • Wednesday • Thursday • Friday • Saturday
RunCriteriaId	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description Required. The ID of the filter criteria that's defined for the invoice batch run or the payment batch run. This field is a polymorphic relationship field.</p> <p>Relationship Name RunCriteria</p> <p>Refers To InvoiceBatchRunCriteria</p>
ShouldExcludeWkendAndHldy	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Required. Indicates whether weekends and holidays are excluded from the billing schedule (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
ShouldStartRunImmediately	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Required. Indicates whether the invoice scheduler must start the run immediately (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>. Available in API version 63.0 and later.</p>
StartDate	<p>Type date</p> <p>Properties Filter, Group, Sort</p>

Field	Details
	<p>Description Required. The date when the scheduler triggers its first batch processing job.</p>
StartTime	<p>Type time</p> <p>Properties Filter, Sort</p> <p>Description Required. The time when the scheduler triggers the batch processing job.</p>
Status	<p>Type picklist</p> <p>Properties Filter, Group, Restricted picklist, Sort</p> <p>Description Required. The status of the scheduler. Only active schedulers can trigger batch processing jobs. Valid values are:</p> <ul style="list-style-type: none"> • Active • Canceled • Draft • Inactive
TimeZone	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description The time zone is either the value selected when the run was configured, or it's the user's time zone. The time zone is shown in Greenwich Mean Time (GMT).</p>

Associated Objects

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

[BillingBatchSchedulerShare](#) on page 2182

Sharing is available for the object.

BillingBatchFilterCriteria

Represents the filter that all eligible billing schedules must satisfy in order to be picked up by an invoice run. This object is available in API version 62.0 and later.

Supported Calls

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

Special Access Rules

You need the Billing Admin permission set to access this object.

Fields

Field	Details
<code>BatchCriteriaId</code>	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description Required. The ID of the batch criteria record. This field is a polymorphic relationship field.</p> <p>Relationship Name BatchCriteria</p> <p>Refers To InvoiceBatchRunCriteria</p>
<code>BillingBatchFilterCriteriaNumber</code>	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Required. The auto-generated reference number for the billing batch filter criteria.</p>
<code>ColumnEnum</code>	<p>Type picklist</p> <p>Properties Filter, Group, Restricted picklist, Sort</p> <p>Description Required. The column or field to which the filter criteria are applied.</p>

Field	Details
CriteriaFieldType	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description The data type of the custom or standard criteria field. Valid values are:</p> <ul style="list-style-type: none"> • CustomBoolean • CustomCurrency • CustomDate • CustomLookup • CustomNumber • CustomPercent • CustomText <p>Available in API version 63.0 and later.</p>
CriteriaSequence	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The order in which the filter criteria are applied on the billing batch.</p>
CustomCriteriaFieldName	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The API name of the custom field on the object specified in the <code>ObjectName</code> field. The filter criteria is applied on the custom field. This object is available in API version 65.0 and later.</p>
InvoiceRunMatchingValue	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description A value to match during an invoice run. This field is useful for filtering the invoices based on specific criteria during the billing process.</p>

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate is not null, the user accessed this record or list view indirectly.</p>
ObjectName	<p>Type picklist</p> <p>Properties Filter, Group, Restricted picklist, Sort</p> <p>Description Required. The object on which the filter criteria are applied. Valid values are:</p> <ul style="list-style-type: none"> • AccountBillingAccount — Available in API version 63.0 and later. • BillingAccount — Available in API version 63.0 and later. • BillingSchedule • BillingScheduleGroup • CreditMemo — Available in API version 63.0 and later. • CreditMemoInvApplication — Available in API version 63.0 and later. • CreditMemoLine — Available in API version 63.0 and later. • CreditMemoLineInvoiceLine — Available in API version 63.0 and later. • CreditMemoLineTax — Available in API version 63.0 and later. • DebitMemoLine — Available in API version 65.0 and later. • Invoice — Available in API version 63.0 and later. • InvoiceLine — Available in API version 63.0 and later. • InvoiceLineTax — Available in API version 63.0 and later. • Payment — Available in API version 64.0 and later. • PaymentGateway — Available in API version 64.0 and later. • PaymentLineInvoice — Available in API version 64.0 and later. • PaymentLineInvoiceLine — Available in API version 64.0 and later.

Field	Details
	<ul style="list-style-type: none"> • <code>PaymentSchedule</code> — Available in API version 64.0 and later. • <code>PaymentScheduleItem</code> — Available in API version 64.0 and later. • <code>Refund</code> — Available in API version 64.0 and later. • <code>RefundLinePayment</code> — Available in API version 64.0 and later.
Operation	<p>Type picklist</p> <p>Properties Filter, Group, Restricted picklist, Sort</p> <p>Description Required. The type of comparison or logical operation to be performed on the specified column or field.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • <code>Contains</code> — Available in API version 63.0 and later. • <code>Equals</code> • <code>GreaterThan</code> — Available in API version 63.0 and later. • <code>GreaterThanOrEqualTo</code> — Available in API version 63.0 and later. • <code>InList</code> • <code>LessThan</code> — Available in API version 63.0 and later. • <code>LessThanOrEqualTo</code> • <code>NotEquals</code> — Available in API version 63.0 and later. • <code>OfType</code> • <code>StartsWith</code> — Available in API version 63.0 and later.
OwnerId	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description Required. The ID of the user who created the billing batch filter criteria.</p> <p>This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
PaymentRunMatchingValue	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Sort</p>

Field	Details
	<p>Description</p> <p>A value to match during a payment run. This field is useful for filtering the payments based on specific criteria during the billing process. This field is visible but isn't used in API version 62.0.</p>
StandardCriteriaField	<p>Type</p> <p>string</p> <p>Properties</p> <p>Filter, Group, Nillable, Sort</p> <p>Description</p> <p>The name of the standard field for the object specified in the <code>ObjectName</code> field. The filter criteria is applied on the standard field. Available in API version 63.0 and later.</p>
Value	<p>Type</p> <p>string</p> <p>Properties</p> <p>Filter, Group, Sort</p> <p>Description</p> <p>Required. The value to be used in the filter criteria.</p>

Associated Objects

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

[BillingBatchFilterCriteriaHistory](#) on page 2178

History is available for tracked fields of the object.

BillingMilestonePlan

Represents a structured approach to invoicing where invoices are scheduled based on predefined milestones. This object is available in API version 63.0 and later.

Supported Calls

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

Special Access Rules

You need Revenue Cloud Billing license and the Billing Admin permission set to access this object.

Fields

Field	Details
BillingTreatmentId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Required. The billing treatment associated with the billing milestone plan. This field is a relationship field.</p> <p>Relationship Name BillingTreatment</p> <p>Refers To BillingTreatment</p>
Description	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Additional details about the billing milestone plan.</p>
ExternalReference	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The external reference item that links a billing milestone plan item to the original transaction item. Available in API version 65.0 and later.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed a billing milestone plan record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	<p>Description</p> <p>The timestamp when the current user last viewed a billing milestone plan record. If this value is null, it's possible that the user only accessed the billing milestone plan record or a related list view (<code>LastReferencedDate</code>), but not viewed the billing milestone plan record itself.</p>
Name	<p>Type</p> <p>string</p> <p>Properties</p> <p>Create, Filter, Group, idLookup, Sort, Update</p> <p>Description</p> <p>Required. The name of the billing milestone plan.</p>
ReferenceItemAmount	<p>Type</p> <p>currency</p> <p>Properties</p> <p>Create, Filter, Nillable, Sort, Update</p> <p>Description</p> <p>The total reference item amount to be billed.</p>
ReferenceItemId	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p>Description</p> <p>The ID of the reference item that links a billing milestone plan item to the original order item.</p> <p>This field is a polymorphic relationship field.</p> <p>Relationship Name</p> <p>Referenceltem</p> <p>Refers To</p> <p>BillingSchedule, OrderItem</p>
Status	<p>Type</p> <p>picklist</p> <p>Properties</p> <p>Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description</p> <p>Required. The status of the billing milestone plan.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • Active • Cancelled

Field	Details
	<ul style="list-style-type: none"> Completely Billed Draft

BillingMilestonePlanItem

Represents a specific billing milestone within the billing milestone plan that's used to manage and track billing based on the completion of certain deliverables or stages. This object is available in API version 63.0 and later.

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

Supported Calls

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

Special Access Rules

You need Revenue Cloud Billing license and the Billing Admin permission set to access this object.

Fields

Field	Details
BillingMilestonePlanId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The billing milestone plan associated with the billing milestone plan item. This field is a relationship field.</p> <p>Relationship Name BillingMilestonePlan</p> <p>Relationship Type Master-detail</p> <p>Refers To BillingMilestonePlan (the master object)</p>
BillingScheduleGroupId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The billing schedule group that's related to the billing milestone plan item. Available in API version 64.0 and later.</p> <p>This field is a relationship field.</p> <p>Relationship Name BillingScheduleGroup</p> <p>Refers To BillingScheduleGroup</p>
CommencementDate	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The action that triggers the start of the billing milestone plan for a date-based milestone.</p> <p>Valid value is:</p> <ul style="list-style-type: none"> • OrderProductActivation
CommencementDateOffset	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The offset applied to the commencement date to determine the milestone achievement date for a date-based milestone.</p>
CommencementDateOffsetUnit	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The unit of time for the commencement date offset.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • Days • Months • Years
Description	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>


Field	Details
	<p>Description Additional details about the billing milestone plan item.</p>
FlatAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The amount in terms of units of currency, such as \$10 or \$21.52, to invoice from the order item. Used only when <code>Type</code> field has a value of <code>FlatAmount</code>.</p>
IsMilestoneAccomplished	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Required. Indicates whether the billing treatment is for milestone billing (<code>true</code>) or not (<code>false</code>).</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed a billing milestone plan item record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed a billing milestone plan item record. If this value is null, it's possible that the user only accessed the billing milestone plan item record or a related list view (<code>LastReferencedDate</code>), but not viewed the billing milestone plan item record itself.</p>
MilestoneAccomplishmentDate	<p>Type date</p> <p>Properties Filter, Group, Nillable, Sort</p>

Field	Details
	<p>Description The date the milestone is achieved for date-based milestones. For event-based milestones, this field indicates the date when the milestone is manually marked as completed.</p>
MilestoneAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The amount that's billed when the milestone is reached or completed.</p>
MilestoneType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The milestone type for the billing treatment item. Valid values are:</p> <ul style="list-style-type: none"> • Date • Event
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Required. The name of the billing milestone plan item.</p>
Percentage	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The percentage, such as 10% or 12.5%, to invoice from the order item. Used only when Type field has a value of Percentage.</p>
ServicePeriodEnd	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p>

Field	Details
	<p>Description</p> <p>The end date of the service associated with the milestone.</p> <p>Valid value is:</p> <ul style="list-style-type: none"> Order Product End Date
ServicePeriodStart	<p>Type</p> <p>picklist</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description</p> <p>The start date of the service associated with the milestone.</p> <p>Valid value is:</p> <ul style="list-style-type: none"> Order Product Start Date
Status	<p>Type</p> <p>picklist</p> <p>Properties</p> <p>Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description</p> <p>The status of the billing milestone plan item.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> Cancelled Draft Error Invoiced Ready for Invoicing Waiting for Milestone Accomplishment
Type	<p>Type</p> <p>picklist</p> <p>Properties</p> <p>Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description</p> <p>Required. Specifies whether billing schedules created from this billing treatment item are based on a flat amount or a percentage of the order item's total amount.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> FlatAmount Percentage Remainder

BillingPeriodItem

Represents a payment period for an invoice. The billing period item is used to pass billing information to an invoice line. This object is available in API version 62.0 and later.

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

Supported Calls

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

Special Access Rules

You need the Billing Admin permission set to access this object.

Fields

Field	Details
Amount	<p>Type currency</p> <p>Properties Filter, Sort</p> <p>Description Required. The price for the billing period item. This field is used to calculate the invoice line's amount.</p>
BillingPeriodEndDate	<p>Type date</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The end date of a billing period that's used to calculate the invoice line's end date.</p>
BillingPeriodItemNumber	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Required. An auto-generated number identifying the billing period item.</p>
BillingPeriodStartDate	<p>Type date</p>

Field	Details
	<p>Properties Filter, Group, Nillable, Sort</p> <p>Description The start date of a billing period item that's used to calculate the invoice line's start date.</p>
BillingScheduleGroupId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The ID of the parent billing schedule group record that's related to the billing period item. Available in API version 64.0 and later. This field is a relationship field.</p> <p>Relationship Name BillingScheduleGroup</p> <p>Refers To BillingScheduleGroup</p>
BillingScheduleId	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description Required. The ID of the parent billing schedule record of the billing period item. This field is a relationship field.</p> <p>Relationship Name BillingSchedule</p> <p>Relationship Type Master-detail</p> <p>Refers To BillingSchedule (the master object)</p>
InvoiceBatchRunId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The ID of the parent invoice batch run record of the billing period item. This field is a relationship field.</p> <p>Relationship Name InvoiceBatchRun</p>

Field	Details
	<p>Refers To InvoiceBatchRun</p>
InvoiceId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The ID of the parent Invoice record of the Invoice Line record that's generated from the billing period item. This field is a relationship field.</p> <p>Relationship Name Invoice</p> <p>Refers To Invoice</p>
InvoiceLineId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The ID of the Invoice Line record that's generated from the billing period item. This field is populated only when a billing period item is generated by an invoice batch run. Otherwise, this field is empty. This field is a relationship field.</p> <p>Relationship Name InvoiceLine</p> <p>Refers To InvoiceLine</p>
InvoiceStatus	<p>Type picklist</p> <p>Properties Filter, Group, Restricted picklist, Sort</p> <p>Description Required. The status of the invoice that contains the invoice line created from the billing period item. Valid values are:</p> <ul style="list-style-type: none"> • Canceled— The invoice for this billing period item was canceled. • Draft— The invoice has been created but hasn't been posted.

Field	Details
	<ul style="list-style-type: none"> DraftInProgress— The invoice hasn't been created yet. When the invoice is created, the <code>InvoiceStatus</code> field value is changed to <code>Draft</code>. If the invoice generation process fails, the <code>InvoiceStatus</code> field value shows <code>DraftInProgress</code>. Error— The invoice for this billing period item was generated in error. Pending— The invoice for this billing period item is being generated. Posted— An invoice line based on this billing period has been created and added successfully to the invoice. PostingInProgress— An invoice line based on this billing period has been created and is in the process of being added to the invoice. Voided— An invoice line based on this billing period was voided. VoidInProgress— An invoice line based on this billing period is in the process of being voided.
<code>OverageQuantity</code>	<p>Type double</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The quantity of the usage overage that has exceeded the initial grant. This field is available in API version 63.0 and later with Revenue Cloud Billing license.</p>
<code>RelatedMilestonePlanItemId</code>	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The billing milestone plan item that creates the billing period item. This field is available in API version 63.0 and later with Revenue Cloud Billing license. This field is a relationship field.</p> <p>Relationship Name RelatedMilestonePlanItem</p> <p>Refers To BillingMilestonePlanItem</p>
<code>RelatedUsageBillPeriodItemId</code>	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The method for retrieving billing information for usage-based products. This field is available in API version 63.0 and later with Revenue Cloud Billing license.</p>

Field	Details
	<p>This field is a relationship field.</p> <p>Relationship Name RelatedUsageBillPeriodItem</p> <p>Refers To UsageBillingPeriodItem</p>
Status	<p>Type picklist</p> <p>Properties Filter, Group, Restricted picklist, Sort</p> <p>Description Required. The status of the billing period item. Draft billing period items aren't evaluated for invoice line creation.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • Canceled • Draft • Reviewed
TotalUsedQuantity	<p>Type double</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The total quantity of the usage resource consumed during the billing period. This includes granted entitlements, excess consumption, or consumption below the granted entitlements. This field is available in API version 63.0 and later with Revenue Cloud Billing license.</p>
UnitOfMeasureId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The units used to measure the overage. For example, bytes or minutes. Available in API version 63.0 and later.</p> <p>This field is a relationship field.</p> <p>Relationship Name UnitOfMeasure</p> <p>Refers To UnitOfMeasure</p>

BillingPolicy

Represents information about a set of billing treatments that define the rules to invoice a customer for an order item. 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

You need the Billing Admin permission set to access this object.

Fields

Field	Details
BillingTreatmentSelection	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Required. Defines how billing treatments are assigned to order items and assets that are related to the billing policy.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • Default • LegalEntity • Manual
DefaultBillingTreatmentId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description When <code>BillingTreatmentSelection</code> has a value of <code>Default</code>, the selected billing treatment is used for all the order items and assets that are related to the billing policy.</p> <p>This field is a relationship field.</p> <p>Relationship Name DefaultBillingTreatment</p> <p>Refers To BillingTreatment</p>

Field	Details
Description	<p>Type textarea</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Additional details about the billing policy.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed a billing policy indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed a billing policy. If this value is null, it's possible that the user only accessed the billing policy or a related list view (<code>LastReferencedDate</code>), but not viewed the accounting period itself.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Required. The name of the billing policy.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Required. The status of the billing policy. Valid values are:</p> <ul style="list-style-type: none">• 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.

BillingPolicyHistory on page 2178

History is available for tracked fields of the object.

BillingSchedule

Represents information about the order item that's used in the invoicing process. This object is available in API version 62.0 and later.

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

Supported Calls

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

Special Access Rules

You need the Billing Admin permission set to access this object.

Fields

Field	Details
BillDayOfMonth	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The day of the month on which a recurring billing process is scheduled to occur.</p>
BilledAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The total amount (excluding tax) that has been invoiced from the billing schedule. This field is a calculated field.</p>
BillingAccountId	<p>Type reference</p> <p>Properties Filter, Group, Sort</p>

Field	Details
	<p>Description Required. The ID of the account that's related to the billing schedule. This field is a relationship field.</p> <p>Relationship Name BillingAccount</p> <p>Refers To Account</p>
BillingMethod	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description The type of billing used for the source item. Valid values are:</p> <ul style="list-style-type: none"> • Evergreen • OrderAmount • Usage—Available in API version 63.0 and later with Revenue Cloud Billing license.
BillingMilestonePlanId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The billing milestone plan associated with the billing schedule. This field is available in API version 63.0 and later with Revenue Cloud Billing license. This field is a relationship field.</p> <p>Relationship Name BillingMilestonePlan</p> <p>Refers To BillingMilestonePlan</p>
BillingPeriodAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The amount to be invoiced each billing period. For example, if the billing period is monthly, this field shows the monthly amount that appears on the invoice line.</p>

Field	Details
BillingScheduleEndDate	<p>Type date</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The last date that the billing schedule is available for invoicing. This value is inherited from the <code>EndDate</code> field on the order item.</p>
BillingScheduleGroupId	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description Required. The billing schedule group that contains the billing schedule. Billing schedules are grouped when they have the same source order item. The source order item is the original order item that a customer bought. Afterwards, if the customer amends, cancels, or renews the order item, a new billing schedule is created with the <code>BillingScheduleGroupId</code> for the original order item. This field is a relationship field.</p> <p>Relationship Name BillingScheduleGroup</p> <p>Relationship Type Master-detail</p> <p>Refers To BillingScheduleGroup (the master object)</p>
BillingScheduleNumber	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Required. The auto-generated reference number for the billing schedule.</p>
BillingScheduleStartDate	<p>Type date</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The date when the billing schedule is available for invoicing. This value is inherited from the <code>ServiceDate</code> field on the order item.</p>

Field	Details
BillingTerm	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The duration for which the customer is invoiced.</p>
BillingTermUnit	<p>Type picklist</p> <p>Properties Filter, Group, Restricted picklist, Sort</p> <p>Description Required. The unit of measurement of the billing term. Valid values are:</p> <ul style="list-style-type: none"> • BillingMilestonePlan—Available in API version 63.0 and later with Revenue Cloud Billing license. • Day • Month • OneTime • Quarter • Semi-Annual • Year
BillingTreatmentItemId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The billing treatment item that's used to configure invoiceable amounts on the billing schedule. This field is a relationship field.</p> <p>Relationship Name BillingTreatmentItem</p> <p>Refers To BillingTreatmentItem</p>
BillingType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p>

Field	Details
	<p>Description</p> <p>The timing of invoicing for a product or service relative to its delivery to the customer.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • <code>Advance</code>— Invoices a product or service before its delivery. • <code>Arrears</code> — Invoices a product or service after its delivery.
<code>CancellationDate</code>	<p>Type</p> <p>date</p> <p>Properties</p> <p>Filter, Group, Nillable, Sort</p> <p>Description</p> <p>The date from when the user can no longer access the service. For example, if a service ends on August 31, the cancellation date is September 1 because that's the date from when the user can no longer use the service. Billing schedules past their cancellation date aren't invoiced.</p>
<code>Category</code>	<p>Type</p> <p>picklist</p> <p>Properties</p> <p>Filter, Group, Restricted picklist, Sort</p> <p>Description</p> <p>Required. The category of the billing schedule.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • <code>AmendQuantity</code>— A billing schedule for an order that changes the quantity. • <code>Cancellation</code> — A billing schedule for an order that was canceled. • <code>Original</code> — A billing schedule for the initial order. • <code>Renewal</code> — A billing schedule for an order that was renewed.
<code>CustomInvoiceGroupKey</code>	<p>Type</p> <p>string</p> <p>Properties</p> <p>Filter, Group, Restricted picklist, Sort</p> <p>Description</p> <p>The group identifier for which an invoice must be generated when the invoice group type is <code>Custom</code>.</p> <p>This field is available in API version 63.0 and later with Revenue Cloud Billing license.</p>
<code>InvBatchDraftToPostedRunId</code>	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Filter, Group, Nillable, Sort</p>

Field	Details
	<p>Description</p> <p>The batch job that posts all invoices with a status as <code>Draft</code> that are generated by the invoice batch run associated with the billing schedule.</p> <p>This field is a relationship field.</p> <p>Relationship Name</p> <p>InvBatchDraftToPostedRun</p> <p>Refers To</p> <p>InvBatchDraftToPostedRun</p>
InvoiceBatchRunId	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p>Description</p> <p>The invoice batch run that evaluated the billing schedule and its billing period items to generate an invoice.</p> <p>This field is a relationship field.</p> <p>Relationship Name</p> <p>InvoiceBatchRun</p> <p>Refers To</p> <p>InvoiceBatchRun</p>
InvoiceGroupType	<p>Type</p> <p>picklist</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description</p> <p>Specifies whether to generate an invoice for a billing schedule, a custom group, or the default group of account, bill-to-contact, payment term, currency, and tax engine.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • Billing Schedule • Custom • Default <p>This field is available in API version 63.0 and later with Revenue Cloud Billing license.</p>
InvoiceRunMatchingValue	<p>Type</p> <p>picklist</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p>

Field	Details
	<p>Description</p> <p>The batch value used by the invoice run that evaluated the billing schedule. During an invoice run, billing schedules with the same batch value, including null, are grouped to the same invoice run.</p>
LineAmount	<p>Type</p> <p>currency</p> <p>Properties</p> <p>Filter, Nillable, Sort</p> <p>Description</p> <p>The amount associated with a specific line item in the billing schedule. Available in API version 63.0 and later.</p>
NetUnitPrice	<p>Type</p> <p>currency</p> <p>Properties</p> <p>Filter, Nillable, Sort</p> <p>Description</p> <p>The net unit price of the order item for which the billing schedule was created. Available in API version 64.0 and later.</p>
NextBillingDate	<p>Type</p> <p>date</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p>Description</p> <p>The date that the next billing period starts for the invoice. This date is used to calculate which invoice lines are included on an invoice. When an invoice scheduler or API evaluates an order for invoicing, billing schedules with a next billing date on or before the invoice's target date are included in the invoice.</p>
NextChargeFromDate	<p>Type</p> <p>date</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p>Description</p> <p>The date that the billing schedule is invoiced in the upcoming billing period. For example, if you invoiced a customer for a billing period of 01/01/24 through 01/31/24, the billing schedule's <code>NextChargeFromDate</code> is 02/01/22.</p>
OriginalBillingScheduleId	<p>Type</p> <p>reference</p>

Field	Details
	<p>Properties Filter, Group, Nillable, Sort</p> <p>Description If the billing schedule is an amended or canceled billing schedule, then this field shows the original billing schedule. Otherwise, this field is null. This field is a relationship field.</p> <p>Relationship Name OriginalBillingSchedule</p> <p>Refers To BillingSchedule</p>
PendingAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The amount from the current billing term that hasn't been billed yet. For example, the unbilled amount for a month, quarter, or year, depending on this billing schedule's billing term.</p>
Quantity	<p>Type double</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The quantity of the order item that created the billing schedule.</p>
Reference	<p>Type reference</p> <p>Properties Filter, Group, idLookup, Sort</p> <p>Description The ID of the parent record of the reference item for which the billing schedule is created. Available in API version 61.0 and later.</p>
ReferenceEntityId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The parent order of the order item that created the billing schedule. This field is a polymorphic relationship field.</p>

Field	Details
	<p>Relationship Name ReferenceEntity</p> <p>Refers To Order</p>
ReferenceEntityItemId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The order item or asset that created the billing schedule. This field is a polymorphic relationship field.</p> <p>Relationship Name ReferenceEntityItem</p> <p>Refers To OrderItem, OrderItemAdjustmentLineItem</p>
ReferenceItem	<p>Type reference</p> <p>Properties Filter, Group, idLookup, Sort</p> <p>Description The ID of the transaction line item record for which the billing schedule is created. Available in API version 61.0 and later.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Required. The status of the order item that the billing schedule represents. Valid values are:</p> <ul style="list-style-type: none"> • <code>WaitingForMilestoneEventAccomplishment</code>—Available in API version 63.0 and later with Revenue Cloud Billing license. • <code>CompletelyBilled</code> • <code>Error</code> • <code>Processing</code> • <code>ReadyForInvoicing</code>
TaxTreatmentId	<p>Type reference</p>

Field	Details
	<p>Properties Filter, Group, Sort</p> <p>Description Required. The ID of the treatment that's used to calculate tax for the billing schedule. This value is defined based on the order item's tax policy.</p> <p>This field is a relationship field.</p> <p>Relationship Name TaxTreatment</p> <p>Refers To TaxTreatment</p>
TotalAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The total amount of the order item represented by the billing schedule.</p>
Type	<p>Type picklist</p> <p>Properties Filter, Group, Restricted picklist, Sort</p> <p>Description The type of the billing schedule.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • LineItemAdjustedCharge • LineItemAdjustment • LineItemCharge
UnitOfMeasureId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The ID of the unit of measure for the billing schedule. Available in API version 63.0 and later.</p> <p>This field is a relationship field.</p> <p>Relationship Name UnitOfMeasure</p> <p>Refers To UnitOfMeasure</p>

Field	Details
UnitPrice	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The price for an individual unit of the billing schedule's parent order item, including charges, adjustments, and discounts. This value is inherited from the order item's <code>UnitPrice</code> field.</p>
UsageResourceId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The usage resource associated with the billing schedule. This field is available in API version 63.0 and later with Revenue Cloud Billing license. This field is a relationship field.</p> <p>Relationship Name UsageResource</p> <p>Refers To UsageResource</p>

BillingScheduleGroup

Represents a consolidated view of all the billing schedules related to the order items generated from one asset, including new orders and amendment orders. This object is available in API version 62.0 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

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

Special Access Rules

You need the Billing Admin permission set to access this object.

Fields

Field	Details
AnchorProdtBillingSchdGrpId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The billing schedule group for the anchor product in a usage-based product. The anchor product contains the grants for the usage-based product. This field is available in API version 63.0 and later with Revenue Cloud Billing license. This field is a relationship field.</p> <p>Relationship Name AnchorProdtBillingSchdGrp</p> <p>Refers To BillingScheduleGroup</p>
BillDayOfMonth	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The day of the month on which a recurring billing process is scheduled to occur.</p>
BillToContactId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the contact related to the billing schedule group. This field can't be modified when related billing schedules are in processing. This field is a relationship field.</p> <p>Relationship Name BillToContact</p> <p>Refers To Contact</p>
BillingAccountId	<p>Type reference</p> <p>Properties Filter, Group, Sort</p>

Field	Details
	<p>Description Required. The ID of the account that's related to the billing schedule group. This field is a relationship field.</p> <p>Relationship Name BillingAccount</p> <p>Refers To Account</p>
BillingAddress	<p>Type address</p> <p>Properties Filter, Nillable</p> <p>Description The compound form of the billing address. Read only. See Address Compound Fields for details on compound address fields.</p>
BillingMethod	<p>Type picklist</p> <p>Properties Filter, Group, Restricted picklist, Sort</p> <p>Description Required. The type of billing used for the source item. Valid values are:</p> <ul style="list-style-type: none"> • Evergreen • OrderAmount • Usage
BillingResumptionDate	<p>Type date</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The date when billing for the asset related to the billing schedule group is resumed. Available in API version 63.0 and later.</p>
BillingScheduleGroupNumber	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Required. The auto-generated reference number for the billing schedule group.</p>

Field	Details
BillingStartMonth	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description This is a read-only field used with annual billing. The field shows the numbers from 1 through 12, which indicate the month when billing begins for an annual subscription. For example, if billing starts in January, the value is 1; if billing starts in June, the value is 6.</p>
BillingSuspensionDate	<p>Type date</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The date when billing for the asset related to the billing schedule group is suspended. Available in API version 63.0 and later.</p>
BillingTerm	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description This field is used with <code>BillingTermUnit</code> field to define a billing cycle. For example, bill every 20 days or every two months. In this example, the <code>BillingTerm</code> field value is 20 and the <code>BillingTermUnit</code> field value is <code>Day</code>.</p>
BillingTermUnit	<p>Type picklist</p> <p>Properties Filter, Group, Restricted picklist, Sort</p> <p>Description Required. The unit of measurement of the billing term. Valid values are:</p> <ul style="list-style-type: none">• <code>BillingMilestonePlan</code>—Available in API version 63.0 and later with Revenue Cloud Billing license.• <code>Day</code>• <code>Month</code>• <code>OneTime</code>• <code>Quarter</code>• <code>Semi-Annual</code>• <code>Year</code>

Field	Details
BillingTreatmentId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The billing treatment item that's used to configure invoiceable amounts on the billing schedule group. This field is a relationship field.</p> <p>Relationship Name BillingTreatment</p> <p>Refers To BillingTreatment</p>
BillingType	<p>Type picklist</p> <p>Properties Filter, Group, Restricted picklist, Sort</p> <p>Description Required. The timing of invoicing for a product or service relative to its delivery to the customer. Valid values are:</p> <ul style="list-style-type: none"> • Advance— Invoices a product or service before its delivery. • Arrears— Invoices a product or service after its delivery.
BindingInstanceId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort, Update</p> <p>Description The asset or custom object record associated with the billing schedule group. This field is available in API version 63.0 and later with Revenue Cloud Billing license. This field is a polymorphic relationship field.</p> <p>Relationship Name BindingInstance</p> <p>Refers To Asset</p>
CancellationDate	<p>Type date</p> <p>Properties Filter, Group, Nillable, Sort</p>

Field	Details
	<p>Description</p> <p>The date from when the user can no longer access the service. For example, if a service ends on August 31, the cancellation date is September 1 because that's the date from when the user can no longer use the service. Billing schedules past their cancellation date aren't invoiced.</p>
Controller	<p>Type</p> <p>picklist</p> <p>Properties</p> <p>Filter, Group, Restricted picklist, Sort</p> <p>Description</p> <p>Required. During the invoicing process, this field determines which date is used when the billing schedule group and billing schedule have a related field with conflicting values. For example, when Controller has a value of <code>BillingScheduleGroup</code>, if the billing schedule's billing day of month is 5 while the billing schedule group's billing day of month is 10, the invoice is sent on the 10th day of the month.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • <code>BillingScheduleGroup</code> • <code>None</code>
EffectiveNextBillingDate	<p>Type</p> <p>date</p> <p>Properties</p> <p>Filter, Group, Nillable, Sort</p> <p>Description</p> <p>The earliest <code>NextBillingDate</code> from all billing schedules in the billing schedule group. This field is a reference field that isn't used for any features or calculations.</p> <p>This field is a calculated field.</p>
EndDate	<p>Type</p> <p>date</p> <p>Properties</p> <p>Filter, Group, Nillable, Sort</p> <p>Description</p> <p>The end date of the billing schedule group.</p>
ExternalBindingInstance	<p>Type</p> <p>string</p> <p>Properties</p> <p>Filter, Group, Nillable, Sort</p>

Field	Details
	<p>Description</p> <p>The custom target associated with the entitlements that are granted with the sellable product. This field is available in API version 63.0 and later with Revenue Cloud Billing license.</p>
ExternalRefRecordIdentifier	<p>Type</p> <p>string</p> <p>Properties</p> <p>Filter, Group, Nillable, Sort, Update</p> <p>Description</p> <p>The identifier of the external record for which the billing schedule group was created. Available in API version 64.0 and later.</p>
LegalEntityId	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Filter, Group, Nillable, Sort</p> <p>Description</p> <p>The ID of the legal entity that's related to the billing schedule group.</p> <p>This field is a relationship field.</p> <p>Relationship Name</p> <p>LegalEntity</p> <p>Refers To</p> <p>LegalEntity</p>
NextBillingDateOverride	<p>Type</p> <p>date</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p>Description</p> <p>The next billing date for all the billing schedules related to the billing schedule group. If specified, this date overrides the next billing dates of the billing schedules. Available in API version 63.0 and later.</p>
OwnerId	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description</p> <p>Required. The ID of the user who created the billing schedule group.</p> <p>This field is a polymorphic relationship field.</p>

Field	Details
	<p>Relationship Name Owner</p> <p>Refers To Group, User</p>
PaymentTermId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the payment term used in this billing schedule group. This field can't be modified when related billing schedules are in processing. This field is a relationship field.</p> <p>Relationship Name PaymentTerm</p> <p>Refers To PaymentTerm</p>
PeriodBoundary	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description This field is inherited from the order item's parent quote line item or sales transaction item. The period boundary determines the start and end date of the billing periods. Valid values are:</p> <ul style="list-style-type: none"> • AlignToCalendar • Anniversary • DayOfPeriod • LastDayOfPeriod
Product2Id	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The product that was charged or ordered to create the billing schedule group. This field is a relationship field.</p> <p>Relationship Name Product2</p>

Field	Details
	<p>Refers To Product2</p>
ProductName	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The name of the product for the order item that's represented by each billing schedule in the billing schedule group.</p>
ProrationPolicyId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The ID of the proration policy that applies to this billing schedule group. The proration policy defines how time periods are calculated for orders. For example, whether partial periods are allowed. This field is inherited from the shared proration policy for each billing schedule in the billing schedule group. This field is a relationship field.</p> <p>Relationship Name ProrationPolicy</p> <p>Refers To ProrationPolicy</p>
ReferenceEntityId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The asset used to create the billing schedules in the billing schedule group. This field is a relationship field.</p> <p>Relationship Name ReferenceEntity</p> <p>Refers To Asset</p>
ReferenceRecordId	<p>Type reference</p>

Field	Details
	<p>Properties Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the Salesforce record for which the billing schedule group was created. Available in API version 64.0 and later.</p> <p>This field is a polymorphic relationship field.</p> <p>Relationship Name ReferenceRecord</p>
SavedPaymentMethodId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the SavedPaymentMethod record that's used to collect payment for the billing schedule group. Available in API version 64.0 and later.</p> <p>This field is a relationship field.</p> <p>Relationship Name SavedPaymentMethod</p> <p>Refers To SavedPaymentMethod</p>
ShipFromAddress	<p>Type address</p> <p>Properties Filter, Nillable</p> <p>Description The address from which the product in the billing schedule group is shipped. Available in API version 64.0 and later.</p>
ShippingAddress	<p>Type address</p> <p>Properties Filter, Nillable</p> <p>Description The compound form of the shipping address. See Address Compound Fields for details on compound address fields.</p> <p>This field is a read-only field.</p>
StartDate	<p>Type date</p>

Field	Details
	<p>Properties Filter, Group, Nillable, Sort</p> <p>Description The earliest start date from all billing schedules in the billing schedule group.</p>
TaxTreatmentId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The ID of the tax treatment record that's used to calculate tax for the billing schedule group. This value is defined based on the order item's tax policy. This field is a relationship field.</p> <p>Relationship Name TaxTreatment</p> <p>Refers To TaxTreatment</p>
TotalBilledAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The amount that has been invoiced for the billing schedules within the billing schedule group. This field is a calculated field.</p>
TotalPendingAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The amount that hasn't yet been invoiced for the billing schedules within the billing schedule group. This field is a calculated field.</p>

BillingTreatment

Represents information about the billing of an order item. 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

You need the Billing Admin permission set to access this object.

Fields

Field	Details
BillingPolicyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The billing policy that's related to the billing treatment. This field is a relationship field.</p> <p>Relationship Name BillingPolicy</p> <p>Refers To BillingPolicy</p>
Description	<p>Type textarea</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Additional details about the billing treatment.</p>
ExcludeFromBilling	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Required. Specifies whether any order items assigned to the treatment are excluded from billing. Valid values are:</p> <ul style="list-style-type: none"> • No • Yes

Field	Details
IsMilestoneBilling	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Required. Indicates whether the billing treatment is for milestone billing (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>. This field is available in API version 63.0 and later with Revenue Cloud Billing license.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed a billing treatment indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed a billing treatment. If this value is null, it's possible that the user only accessed the billing treatment or a related list view (<code>LastReferencedDate</code>), but not viewed the billing treatment itself.</p>
LegalEntityId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The legal entity that's used to assign the treatment to order items when the parent billing policy's <code>BillingTreatmentSelection</code> field value is <code>LegalEntity</code>. This field is a relationship field.</p> <p>Relationship Name LegalEntity</p> <p>Refers To LegalEntity</p>
Name	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Required. The name of the billing treatment.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Required. The status of the billing treatment. Valid values are:</p> <ul style="list-style-type: none"> • Active • Draft • Inactive <p>Draft or inactive billing treatments can't be assigned to order items.</p>

Associated Objects


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

BillingTreatmentHistory on page 2178

History is available for tracked fields of the object.

BillingTreatmentItem

Represents information about allocation of the total amount of an order item to billing schedules throughout the order item's lifecycle. This object is available in API version 62.0 and later.

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

Supported Calls

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

Special Access Rules

You need the Billing Admin permission set to access this object.

Fields

Field	Details
BillingTreatmentId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Required. The parent billing treatment for the billing treatment item. This field is a relationship field.</p> <p>Relationship Name BillingTreatment</p> <p>Relationship Type Master-detail</p> <p>Refers To BillingTreatment (the master object)</p>
BillingType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Required. The timing of invoicing for a product or service relative to its delivery to the customer. Advance billing invoices a product or service before its delivery, whereas arrears billing invoices it after delivery. The billing system assesses the billing type to determine the next billing date for an order product. Valid values are:</p> <ul style="list-style-type: none"> • Advance—If the order item is billed in advance, the order’s billing day of month is evaluated to choose the nearest date on or before the order product’s start date. For example, if a monthly order product’s start date is January 1, and the order’s billing day of month is 15, the next billing date is December 15. • Arrears—If the order item is billed in arrears, the order’s billing day of month is evaluated to choose the nearest date after the order product’s start date. For example, if a monthly order product’s start date is January 1, and the order’s billing day of month is 15, the order product’s next billing date is January 15. • None
Controller	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Required. During the invoicing process, this field determines which value is used when the billing schedule group and billing schedule have a shared field with different values. For</p>

Field	Details
	<p>example, when Controller has a value of <code>BillingScheduleGroup</code>, if the billing schedule's billing day of month is 5 while the billing schedule group's billing day of month is 10, the value of 10 is used.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • <code>BillingScheduleGroup</code> • <code>None</code>
Description	<p>Type textarea</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Additional details about the billing treatment item.</p>
FlatAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The amount in terms of units of currency (such as \$10 or \$21.52) to invoice from the order item. Used only when Type has a value of <code>FlatAmount</code>.</p>
Handling0Amount	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Required. Specifies how invoices are generated for billing period items that have an amount of \$0.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • <code>CreateInvoice</code> • <code>None</code>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed a billing treatment item indirectly, for example, through a list view or related record.</p>

Field	Details
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed a billing treatment item. If this value is null, it's possible that the user only accessed the billing treatment item or a related list view (<code>LastReferencedDate</code>), but not viewed the billing treatment item itself.</p>
MilestoneStartDate	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The occurrence whose date is used to calculate the milestone accomplishment date for the associated billing milestone plan item based on the provided offset details.</p> <p>Valid value is:</p> <ul style="list-style-type: none"> • <code>OrderProductActivation</code> <p>This field is available in API version 63.0 and later with Revenue Cloud Billing license.</p>
MilestoneStartDateOffset	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The calculated value that determines the time difference from the start of a milestone. This value is calculated from the milestone start date record. This field is available in API version 63.0 and later with Revenue Cloud Billing license.</p>
MilestoneStartDateOffsetUnit	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The unit type to use with the milestone start date offset, which defines the milestone date.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • <code>Days</code> • <code>Months</code> • <code>Years</code> <p>This field is available in API version 63.0 and later with Revenue Cloud Billing license.</p>

Field	Details
MilestoneType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The milestone type for the billing treatment item. Valid values are:</p> <ul style="list-style-type: none"> • Date • Event <p>This field is available in API version 63.0 and later with Revenue Cloud Billing license.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Required. The name of the billing treatment item.</p>
Percentage	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The percentage (such as 10% or 12.5%) to invoice from the order item. Used only when <code>Type</code> field has a value of <code>Percentage</code>.</p>
ProcessingOrder	<p>Type int</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. The order in which billing schedules are created based on each billing treatment item. Lower numbers are evaluated first. For example, if your billing treatment has a billing treatment item that invoices at 25 percentage and a <code>ProcessingOrder</code> of 1, and another item that invoices at 75 percentage and a <code>ProcessingOrder</code> of 2, your first billing schedule will be for 25% of the order item's total amount, and your second billing schedule will be for 75% of the order item's total amount.</p>
Sequencing	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Required. The number used to start invoice numbers on invoices generated from this billing treatment item. Valid values are:</p> <ul style="list-style-type: none"> • Manual • None
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Required. The status of the billing treatment item. Valid values are:</p> <ul style="list-style-type: none"> • Active • Draft– Draft billing treatment items aren't evaluated for creating billing schedules.
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Required. Specifies whether billing schedules created from this billing treatment item are based on a flat amount or a percentage of the order item's total amount. Valid values are:</p> <ul style="list-style-type: none"> • FlatAmount • Percentage • Remainder

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.

[BillingTreatmentItemHistory](#) on page 2178

History is available for tracked fields of the object.

BsgRelationship

Represents a relationship between billing schedule groups to support bundles where one parent billing schedule group has multiple child billing schedule groups. This object is available in API version 62.0 and later.

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

Supported Calls

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

Special Access Rules

You need the Billing Admin permission set to access this object.

Fields

Field	Details
AssociatedBsgId	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description Required. The ID of the related billing schedule group. In a bundle relationship, this billing schedule group is the child. This field is a relationship field.</p> <p>Relationship Name AssociatedBsg</p> <p>Refers To BillingScheduleGroup</p>
AssociatedBsgPricing	<p>Type picklist</p> <p>Properties Filter, Group, Restricted picklist, Sort</p> <p>Description Required. This field describes how the related billing schedule group is priced relative to the primary billing schedule group. Valid values are:</p> <ul style="list-style-type: none"> • <code>IncludedInBundlePrice</code> • <code>NotIncludedInBundlePrice</code>
AssociatedBsgRole	<p>Type picklist</p> <p>Properties Filter, Group, Restricted picklist, Sort</p>

Field	Details
	<p>Description</p> <p>Required. This field describes the role of the related billing schedule group in the relationship.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • AddOnComponent • BundleComponent • ClassificationComponent • SetComponent
LastReferencedDate	<p>Type</p> <p>dateTime</p> <p>Properties</p> <p>Filter, Nillable, Sort</p> <p>Description</p> <p>The timestamp when the current user last accessed a billing schedule group record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type</p> <p>dateTime</p> <p>Properties</p> <p>Filter, Nillable, Sort</p> <p>Description</p> <p>The timestamp when the current user last viewed a billing schedule group relationship record. If this value is null, it's possible that the user only accessed the billing schedule group relationship record or a related list view (<code>LastReferencedDate</code>), but not viewed the billing schedule group relationship record itself.</p>
MainBsgId	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Filter, Group, Sort</p> <p>Description</p> <p>Required. The ID of the primary billing schedule group. In a bundle relationship, this billing schedule group is the parent.</p> <p>This field is a relationship field.</p> <p>Relationship Name</p> <p>MainBsg</p> <p>Relationship Type</p> <p>Master-detail</p> <p>Refers To</p> <p>BillingScheduleGroup (the master object)</p>

Field	Details
MainBsgRole	<p>Type picklist</p> <p>Properties Filter, Group, Restricted picklist, Sort</p> <p>Description Required. This field describes the role of the primary billing schedule group in the relationship. Valid values are:</p> <ul style="list-style-type: none"> • AddOn • Bundle • Set
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Required. The auto-generated reference number for the billing schedule relationship.</p>
ProductRelationshipTypeId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The ID of the relationship type between the main and associated billing schedule group. This field is a relationship field.</p> <p>Relationship Name ProductRelationshipType</p> <p>Refers To ProductRelationshipType</p>

CreditMemo

Represents a document that's used to reduce the amount that a buyer owes a seller under the terms of an earlier invoice. This object is available in API version 62.0 and later.

Supported Calls

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

Special Access Rules

You need the Credit Memo Operations User permission set to access this object.

Fields

Field	Details
Balance	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The amount of the credit memo that's available for allocation.</p>
BillToContactId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort, Update</p> <p>Description This field is inherited from the account's <code>Bill to Account</code> field. This field is a relationship field.</p> <p>Relationship Name BillToContact</p> <p>Refers To Contact</p>
BillingAccountId	<p>Type reference</p> <p>Properties Filter, Group, Sort, Update</p> <p>Description Required. The ID of the customer account associated with this credit memo. This field is a relationship field.</p> <p>Relationship Name BillingAccount</p> <p>Refers To Account</p>
Category	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p>

Field	Details
	<p>Description</p> <p>Specifies whether the credit memo is created due to writing off an invoice, converting negative invoice lines, or referencing an existing record.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • InvoiceWriteOff • Referenced • Standalone <p>This field is available in API version 64.0 and later.</p>
CorpCrcyCnvTotAmtWithTax	<p>Type</p> <p>double</p> <p>Properties</p> <p>Filter, Nillable, Sort</p> <p>Description</p> <p>The sum of the total amount with tax on the credit memo in corporate currency. Available in API version 63.0 and later.</p>
CorporateCurrencyCvsnDate	<p>Type</p> <p>date</p> <p>Properties</p> <p>Filter, Group, Nillable, Sort</p> <p>Description</p> <p>The date on which the credit memo amounts are converted to the corporate currency. Available in API version 63.0 and later.</p>
CorporateCurrencyCvsnRate	<p>Type</p> <p>double</p> <p>Properties</p> <p>Filter, Nillable, Sort</p> <p>Description</p> <p>The exchange rate that's used to convert credit memo amounts to the corporate currency. Available in API version 63.0 and later.</p>
CorporateCurrencyIsoCode	<p>Type</p> <p>string</p> <p>Properties</p> <p>Filter, Group, Nillable, Sort</p> <p>Description</p> <p>The currency ISO code of the corporate currency. Available in API version 63.0 and later.</p>

Field	Details
CreationMode	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Specifies whether the credit memo originated in Salesforce or an external system. Valid values are:</p> <ul style="list-style-type: none"> • External • Salesforce
CreditDate	<p>Type date</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The date when the credit memo was posted.</p>
CreditMemoNumber	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort, Update</p> <p>Description The number of the credit memo.</p>
Description	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort, Update</p> <p>Description Additional details about the credit memo.</p>
DocumentNumber	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Required. The auto-generated reference number for the credit memo.</p>
EffectiveDate	<p>Type date</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The effective date of the credit memo. If this field is empty, the credit date is used. For reporting purposes only; this field drives no other logic.</p>
ExternalReference	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort, Update</p> <p>Description An external system's ID for the credit memo.</p>
ExternalReferenceDataSource	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the external system that also contains the credit memo.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed a credit memo record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed a credit memo record. If this value is null, it's possible that the user only accessed the credit memo record or a related list view (<code>LastReferencedDate</code>), but not viewed the credit memo record itself.</p>
LegalEntityAccountingPeriodId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The legal entity accounting period record that's related to the credit memo. This field is available in API version 65.0 and later. This field is a relationship field.</p> <p>Relationship Name LegalEntityAccountingPeriod</p> <p>Refers To LegalEntyAccountingPeriod</p>
LegalEntityId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The legal entity related to the credit memo. This field is available in API version 65.0 and later. This field is a relationship field.</p> <p>Relationship Name LegalEntity</p> <p>Refers To LegalEntity</p>
NetCreditsApplied	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The total difference between the credit applied to and credit unapplied from the invoice. This field is a calculated field.</p>
OwnerId	<p>Type reference</p> <p>Properties Filter, Group, Sort, Update</p> <p>Description Required. The ID of the user who owns a credit memo record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>

Field	Details
ReasonCode	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The reason code for the credit memo's category. For example, BD can be the reason code when the credit memo's category is <code>InvoiceWriteOff</code> and the reason for the invoice write-off is bad debt. This field is available in API version 64.0 and later.</p>
ReferenceEntityId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the record that this credit memo was generated from. For example, the order, order summary, or invoice. This field is a polymorphic relationship field.</p> <p>Relationship Name ReferenceEntity</p> <p>Refers To Invoice, Order</p>
SettlementLevel	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Specifies whether the credit memo amount was applied to an invoice or an invoice line.</p>
SourceAction	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Specifies which Salesforce API created the credit memo. Valid values are:</p> <ul style="list-style-type: none"> • Invoice • NegativeInvoiceLineConversion • Standalone • VoidPostedInvoice • WriteOffPostedInvoice—Available in API version 64.0 and later.


Field	Details
Status	<p>Type picklist</p> <p>Properties Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Required. The status of the credit memo. Valid values are:</p> <ul style="list-style-type: none"> • Canceled • Draft • Error • Pending • Posted • Voided
TotalAdjustmentAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The sum of the TotalAmount field values for the credit memo's adjustment lines. This field is a calculated field.</p>
TotalAdjustmentAmountWithTax	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The sum of the credit memo's adjustment line amounts, including tax. Available in API versions 62.0 and 63.0.</p>
TotalAdjustmentTaxAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The sum of the credit memo's adjustment line tax. Adjustment line balances are excluded. Available in API versions 62.0 and 63.0.</p>
TotalAmount	<p>Type currency</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The sum of the credit memo's <code>TotalLineAmount</code> and <code>TotalAdjustmentAmount</code> field values. This field is a calculated field.</p>
<code>TotalAmountWithTax</code>	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The total credit memo amount, with tax included. This field is a calculated field.</p>
<code>TotalChargeAmount</code>	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The sum of the <code>TotalAmount</code> field values for the credit memo's charge lines. This field is a calculated field.</p>
<code>TotalChargeAmountWithTax</code>	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The sum of the credit memo's charge line amounts, including tax. Available in API versions 62.0 and 63.0.</p>
<code>TotalChargeTaxAmount</code>	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The sum of the credit memo's charge tax amount. Available in API versions 62.0 and 63.0.</p>
<code>TotalTaxAmount</code>	<p>Type currency</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The sum of the <code>TotalAmount</code> field values for the credit memo's tax lines. This field is a calculated field.</p>

CreditMemoAddressGroup

Represents the storage of the buyer's address information, which is used to determine the tax credit amount for a buyer when a credit memo is issued. This object is available in API version 62.0 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

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

Special Access Rules

You need the Credit Memo Operations User permission set to access this object.

Fields

Field	Details
Address	<p>Type address</p> <p>Properties Filter, Nillable</p> <p>Description The buyer's address.</p>
CreditMemoAddressGroupNumber	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Required. The auto-generated reference number for the credit memo address group.</p>

Field	Details
CreditMemoId	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description Required. The ID of the credit memo associated with the address group. This field is a relationship field.</p> <p>Relationship Name CreditMemo</p> <p>Relationship Type Master-detail</p> <p>Refers To CreditMemo (the master object)</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed a credit memo address group record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed a credit memo address group record. If this value is null, it's possible that the user only accessed the credit memo address group record or a related list view (<code>LastReferencedDate</code>), but not viewed the credit memo address group record itself.</p>

CreditMemoInvApplication

Represents information about the application of a credit memo to an invoice. This object is available in API version 62.0 and later.



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

Supported Calls

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

Special Access Rules

You need the Credit Memo Operations User permission set to access this object.

Fields

Field	Details
Amount	<p>Type currency</p> <p>Properties Filter, Sort</p> <p>Description Required. The amount of the credit memo that was applied to or unapplied from the invoice.</p>
AppliedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date when the credit memo was applied. If the credit memo invoice application's type is <code>Unapplied</code>, this value is inherited from the <code>Applied</code> date of the credit memo referenced in the <code>AssociatedLineId</code> field.</p>
AssociatedLineId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description ID of the original credit memo invoice application for a credit memo invoice application that represents an unapplied credit memo. This field is a relationship field.</p> <p>Relationship Name AssociatedLine</p> <p>Refers To CreditMemoInvApplication</p>
CreditMemoBalance	<p>Type currency</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The balance of a credit memo after it's applied or unapplied. This field is a snapshot of the credit memo's balance after the action. This field isn't updated after further changes to the credit memo balance.</p>
CreditMemoId	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description Required. The credit memo that was applied or unapplied. This field is a relationship field.</p> <p>Relationship Name CreditMemo</p> <p>Refers To CreditMemo</p>
CreditMemoInvoiceNumber	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Required. An auto-generated number identifying the credit memo invoice application.</p>
Date	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date when the credit memo amount was applied to the invoice.</p>
Description	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort, Update</p> <p>Description Additional details about the credit memo applied to an invoice.</p>

Field	Details
EffectiveDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The effective date of the application or unapplication of credit. You can provide this value when applying or unapplying the credit memo. This field is optional and provided only for reporting purposes. It doesn't affect the credit memo invoice application's other fields.</p>
HasBeenUnapplied	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Specifies whether this credit memo application has been unapplied from the target invoice. Valid values are:</p> <ul style="list-style-type: none"> • NA • No • Yes
ImpactAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The net adjustment to the invoice's balance after a credit memo is applied or unapplied. If a credit memo was applied, this value is the negative version of the credit memo invoice application's <code>Amount</code> field. If a credit memo was unapplied, this value is the positive version of the credit memo invoice application's <code>Amount</code> field. This field is a calculated field.</p>
InvoiceBalance	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The balance of the credit memo after a credit memo is applied or unapplied. This field is a snapshot of the credit memo's balance after the action. This field isn't updated after further changes to the credit memo balance.</p>
InvoiceId	<p>Type reference</p>

Field	Details
	<p>Properties Filter, Group, Sort</p> <p>Description Required. The invoice to which the credit memo is applied. This field is a relationship field.</p> <p>Relationship Name Invoice</p> <p>Relationship Type Master-detail</p> <p>Refers To Invoice (the master object)</p>
Type	<p>Type picklist</p> <p>Properties Filter, Group, Restricted picklist, Sort</p> <p>Description Required. Specifies whether the credit memo line application was generated because of an apply action (application) or an unapply action (unapplication). Valid values are:</p> <ul style="list-style-type: none"> • Applied • Unapplied
UnappliedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date when this application was unapplied from the target invoice.</p>

Associated Objects

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

[CreditMemolnvApplicationFeed](#) on page 2171

Feed tracking is available for the object.

[CreditMemolnvApplicationHistory](#) on page 2178

History is available for tracked fields of the object.

CreditMemoLine

Represents the product, service, adjustment, or tax line items included in a credit memo. This object is available in API version 62.0 and later.

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

Supported Calls

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

Special Access Rules

You need the Credit Memo Operations User permission set to access this object.

Fields

Field	Details
<code>AdjustmentAmount</code>	<p>Type currency</p> <p>Properties Filter, Nillable, Sort, Update</p> <p>Description The amount of this credit memo line item if its type is Adjustment.</p>
<code>AdjustmentAmountWithTax</code>	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The sum of the adjustment amount and the adjustment tax amount. Available in API versions 62.0 and 63.0.</p>
<code>AdjustmentTaxAmount</code>	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The amount of the tax related to the adjustment amount. Available in API versions 62.0 and 63.0.</p>
<code>Balance</code>	<p>Type currency</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The amount of the credit memo line available for allocation.</p>
BillingAddressId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The ID of the billing address related to this credit memo line. This field is a relationship field.</p> <p>Relationship Name BillingAddress</p> <p>Refers To CreditMemoAddressGroup</p>
ChargeAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort, Update</p> <p>Description The amount of this credit memo line item if its type is Charge.</p>
ChargeAmountWithTax	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The sum of the charge amount and the charge tax amount. Available in API versions 62.0 and 63.0.</p>
ChargeTaxAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The amount of the tax related to the charge amount. Available in API versions 62.0 and 63.0.</p>
CorpCurrencyCnvChargeAmt	<p>Type double</p>

Field	Details
	<p>Properties Filter, Nillable, Sort, Update</p> <p>Description The amount of the credit memo line item if its type is Charge in corporate currency. Available in API version 63.0 and later.</p>
CorpCurrencyCnvTotalTaxAmt	<p>Type double</p> <p>Properties Filter, Nillable, Sort, Update</p> <p>Description The sum of the total amount with the tax on the credit memo line in corporate currency. Available in API version 63.0 and later.</p>
CorporateCurrencyCvsnDate	<p>Type date</p> <p>Properties Filter, Group, Nillable, Sort, Update</p> <p>Description The date on which the credit memo line amounts are converted to the corporate currency. Available in API version 63.0 and later.</p>
CorporateCurrencyCvsnRate	<p>Type double</p> <p>Properties Filter, Nillable, Sort, Update</p> <p>Description The exchange rate that's used to convert the credit memo line amounts to the corporate currency. Available in API version 63.0 and later.</p>
CorporateCurrencyIsoCode	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort, Update</p> <p>Description The currency ISO code of the corporate currency. Available in API version 63.0 and later.</p>
CreditMemoId	<p>Type reference</p> <p>Properties Filter, Group, Sort</p>

Field	Details
	<p>Description Required. The ID of the parent credit memo. This field is a relationship field.</p> <p>Relationship Name CreditMemo</p> <p>Relationship Type Master-detail</p> <p>Refers To CreditMemo (the master object)</p>
Description	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort, Update</p> <p>Description Additional details about the credit memo line.</p>
EndDate	<p>Type date</p> <p>Properties Filter, Group, Nillable, Sort, Update</p> <p>Description The description of the credit memo line.</p>
LegalEntityAccountingPeriodId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the legal entity accounting period record of the credit memo line. This field is a relationship field.</p> <p>Relationship Name LegalEntityAccountingPeriod</p> <p>Refers To LegalEntyAccountingPeriod</p>
LegalEntityId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The ID of the legal entity record related to the credit memo line. This field is a relationship field.</p> <p>Relationship Name LegalEntity</p> <p>Refers To LegalEntity</p>
LineAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The amount of the credit memo line. This field is a calculated field.</p>
Name	<p>Type string</p> <p>Properties Filter, Group, idLookup, Sort, Update</p> <p>Description Required. The name of the credit memo line.</p>
NetCreditsApplied	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The total amount applied to invoice lines from the credit memo. This amount is calculated by subtracting the total unapplied credit amount from the total applied credit amount. This field is a calculated field.</p>
Product2Id	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the product or service being credited in the credit memo line. This field is a relationship field.</p> <p>Relationship Name Product2</p>

Field	Details
	<p>Refers To Product2</p>
ReferenceEntityItemId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort, Update</p> <p>Description The order product or invoice line corresponding to this credit memo line. This field is a polymorphic relationship field.</p> <p>Relationship Name ReferenceEntityItem</p> <p>Refers To InvoiceLine, OrderItem</p>
ReferenceEntityItemType	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The type of transaction that generated the credit memo line. Valid values are:</p> <ul style="list-style-type: none"> • Delivery Charge • Fee • Order Product
ReferenceEntityItemTypeCode	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The type of object that generated the credit memo line. Valid values are:</p> <ul style="list-style-type: none"> • Charge • Product
ShipFromAddressId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p>

Field	Details
	<p>Description The address from which the product in the credit memo line is shipped. Available in API version 64.0 and later. This field is a relationship field.</p> <p>Relationship Name ShipFromAddress</p> <p>Refers To CreditMemoAddressGroup</p>
ShippingAddressId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The ID of the shipping address. This field is a relationship field.</p> <p>Relationship Name ShippingAddress</p> <p>Refers To CreditMemoAddressGroup</p>
StartDate	<p>Type date</p> <p>Properties Filter, Group, Nillable, Sort, Update</p> <p>Description The first date of the billing for the service for credit memo lines generated from a time-based service.</p>
Status	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The status of the credit memo line. This field is inherited from the credit memo.</p>
TaxAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort, Update</p>

Field	Details
	<p>Description</p> <p>The total tax amount for the credit memo.</p>
TaxTreatmentId	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p>Description</p> <p>The ID of the tax treatment record for the credit memo line.</p> <p>This field is a relationship field.</p> <p>Relationship Name</p> <p>TaxTreatment</p> <p>Refers To</p> <p>TaxTreatment</p>

CreditMemoLineInvoiceLine

Represents a junction between a credit memo line and an invoice line. This object is available in API version 62.0 and later.



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

Supported Calls

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

Special Access Rules

You need the Credit Memo Operations User permission set to access this object.

Fields

Field	Details
Amount	<p>Type</p> <p>currency</p> <p>Properties</p> <p>Filter, Sort</p> <p>Description</p> <p>Required. The amount that's been applied to or unapplied from the invoice line.</p>

Field	Details
AppliedDateTime	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date and time when the credit memo line was applied to the invoice line.</p>
CreditMemoLineBalance	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The balance of the credit memo line after it's applied to or unapplied from the invoice line.</p>
CreditMemoLineId	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description Required. The ID of the credit memo line record that's applied to or unapplied from the invoice line. This field is a relationship field.</p> <p>Relationship Name CreditMemoLine</p> <p>Refers To CreditMemoLine</p>
CreditMemoLineInvoiceLineNumber	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Required. An auto-generated number identifying the credit memo line invoice line.</p>
Description	<p>Type textarea</p> <p>Properties Filter, Group, Nillable, Sort, Update</p> <p>Description Additional details about the credit memo line invoice line.</p>


Field	Details
EffectiveDateTime	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date and time when the credit memo line's application to or unapplication from the invoice line becomes effective.</p>
ImpactAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The credit memo line invoice line's financial impact against the customer's accounts receivable. If the credit memo line invoice line's type is <code>Applied</code>, the impact amount is the negative equivalent of the credit memo line invoice line's amount. Otherwise, the impact amount is equal to the credit memo line invoice line's amount. This field is a calculated field.</p>
InvoiceLineBalance	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The balance of the invoice line after the credit memo line was applied or unapplied.</p>
InvoiceLineId	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description Required. The ID of the invoice line record to which the credit memo line has been applied or unapplied. This field is a relationship field.</p> <p>Relationship Name InvoiceLine</p> <p>Relationship Type Master-detail</p> <p>Refers To InvoiceLine (the master object)</p>

Field	Details
LegalEntityAccountingPeriodId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the legal entity accounting period record related to the credit memo line invoice line. This field is a relationship field.</p> <p>Relationship Name LegalEntityAccountingPeriod</p> <p>Refers To LegalEntyAccountingPeriod</p>
LegalEntityId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the legal entity record related to the credit memo line invoice line. This field is a relationship field.</p> <p>Relationship Name LegalEntity</p> <p>Refers To LegalEntity</p>
RelatedCrMemoLineInvcLineId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The ID of the related credit memo line invoice line record of the type <code>Applied</code> when the credit memo line invoice line's type is <code>Unapplied</code>. This field is a relationship field.</p> <p>Relationship Name RelatedCrMemoLineInvcLine</p> <p>Refers To CreditMemoLineInvoiceLine</p>
Type	<p>Type picklist</p>

Field	Details
	<p>Properties Filter, Group, Restricted picklist, Sort</p> <p>Description Required. Specifies whether the credit memo line has been applied to or unapplied from the invoice line.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • Applied • Unapplied
UnappliedDateTime	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date and time when the credit memo line was unapplied from the invoice line.</p>
UnappliedStatus	<p>Type picklist</p> <p>Properties Filter, Group, Restricted picklist, Sort</p> <p>Description Required. Specifies whether the credit memo line has been unapplied from the invoice line.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • NA • No • Yes

CreditMemoLineTax

Represents tax information of a credit memo line of type `Tax`. This object is available in API version 62.0 and later.

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

Supported Calls

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

Special Access Rules

You need the Tax Admin permission set to access this object.

Fields

Field	Details
BillingAddressId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The billing address of the parent credit memo line. This field is a relationship field.</p> <p>Relationship Name BillingAddress</p> <p>Refers To CreditMemoAddressGroup</p>
CalculationStatus	<p>Type picklist</p> <p>Properties Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description The status of the tax calculation. Valid values are:</p> <ul style="list-style-type: none"> • Complete • Error • None <p>The default value is None.</p>
CorpCrcyCnvTaxAmount	<p>Type double</p> <p>Properties Filter, Nillable, Sort, Update</p> <p>Description The total tax amount of the credit memo line tax in corporate currency. Available in API version 63.0 and later.</p>
CorporateCurrencyCvsnDate	<p>Type date</p> <p>Properties Filter, Group, Nillable, Sort, Update</p> <p>Description The date on which the credit memo line tax amounts are converted to the corporate currency. Available in API version 63.0 and later.</p>

Field	Details
CorporateCurrencyCvsnRate	<p>Type double</p> <p>Properties Filter, Nillable, Sort, Update</p> <p>Description The exchange rate that's used to convert the credit memo line tax amounts to the corporate currency. Available in API version 63.0 and later.</p>
CorporateCurrencyIsoCode	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort, Update</p> <p>Description The currency ISO code of the corporate currency. Available in API version 63.0 and later.</p>
CreditMemoLineId	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description Required. The ID of the parent charge or adjustment credit memo line record that a credit memo line tax is related to. This field is a relationship field.</p> <p>Relationship Name CreditMemoLine</p> <p>Relationship Type Master-detail</p> <p>Refers To CreditMemoLine (the master object)</p>
CreditMemoLineTaxNumber	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Required. An auto-generated number identifying a credit memo line tax.</p>
Description	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description Additional details about the credit memo line tax.</p>
EndDate	<p>Type date</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The end date of a credit memo line tax.</p>
LegalEntityAccountingPeriodId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The ID of the legal entity accounting period record that's related to a credit memo line tax. This field is a relationship field.</p> <p>Relationship Name LegalEntityAccountingPeriod</p> <p>Refers To LegalEntyAccountingPeriod</p>
LegalEntityId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the legal entity record that's related to a credit memo line tax. This field is a relationship field.</p> <p>Relationship Name LegalEntity</p> <p>Refers To LegalEntity</p>
Product2Id	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The product or service being credited in the parent credit memo line. Available in API version 62.0 only.</p>

Field	Details
	<p>This field is a relationship field.</p> <p>Relationship Name Product2</p> <p>Refers To Product2</p>
ReferenceEntityItemId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The invoice line tax corresponding to a credit memo line tax. This field is a relationship field.</p> <p>Relationship Name ReferenceEntityItem</p> <p>Refers To InvoiceLineTax</p>
ShipFromAddressId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The ship from address specified in the parent credit memo line. Available in API version 64.0 and later. This field is a relationship field.</p> <p>Relationship Name ShipFromAddress</p> <p>Refers To CreditMemoAddressGroup</p>
ShippingAddressId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The shipping address of the parent credit memo line. This field is a relationship field.</p> <p>Relationship Name ShippingAddress</p>

Field	Details
	<p>Refers To CreditMemoAddressGroup</p>
StartDate	<p>Type date</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The start date of a credit memo line tax.</p>
TaxAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The total amount of a credit memo line tax.</p>
TaxCode	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The code that's used to calculate the tax rate for the parent credit memo line.</p>
TaxDocumentNumber	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The document number that's used to calculate the tax rate for the parent credit memo line.</p>
TaxEffectiveDate	<p>Type date</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The date used to calculate the tax amount.</p>
TaxName	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p>

Field	Details
	<p>Description The user-defined name for a credit memo line tax.</p>
TaxRate	<p>Type percent</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The percentage that's used to calculate tax.</p>
TaxTransactionNumber	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The number of the transaction in the external tax engine that calculated tax for the parent credit memo line.</p>
TaxTreatmentId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The ID of the tax treatment record that's related to a credit memo line tax. This field is a relationship field.</p> <p>Relationship Name TaxTreatment</p> <p>Refers To TaxTreatment</p>

Associated Objects

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

[CreditMemoLineTaxFeed](#) on page 2171

Feed tracking is available for the object.

[CreditMemoLineTaxHistory](#) on page 2178

History is available for tracked fields of the object.

DebitMemo

Represents the document used to charge an additional amount to a buyer by a seller. An invoice is generated for the debit memo in the next invoice run. This object is available in API version 65.0 and later.

Supported Calls

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

Special Access Rules

You need Revenue Cloud Billing license and one of these permission sets to access this object.

- Billing Admin permission set
- Billing Operations User permission set
- Payments Admin permission set
- Payments Operation User permission set
- Credit Memo Operations User permission set

Fields

Field	Details
AccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The account that's related to the debit memo record. This field is a relationship field.</p> <p>Relationship Name Account</p> <p>Refers To Account</p>
CorpCrcyCnvTotChargeAmt	<p>Type double</p> <p>Properties Filter, Nillable, Sort, Update</p> <p>Description The total charge amount of the debit memo in corporate currency.</p>
CorporateCurrencyCvsnDate	<p>Type date</p>

Field	Details
	<p>Properties Filter, Group, Nillable, Sort, Update</p> <p>Description The exchange date that's used to convert the debit memo amounts into corporate currency.</p>
CorporateCurrencyCvsnRate	<p>Type double</p> <p>Properties Filter, Nillable, Sort, Update</p> <p>Description The exchange rate that's used to convert the debit memo amounts into corporate currency.</p>
CorporateCurrencyIsoCode	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort, Update</p> <p>Description The currency ISO code of the corporate currency.</p>
Description	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The description of the debit memo.</p>
DocumentNumber	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description An auto-generated number assigned to the debit memo record.</p>
InvoiceGenerationStatus	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The status of invoice generation for the debit memo. Valid values are:</p> <ul style="list-style-type: none"> • Draft Invoice Generated

Field	Details
	<ul style="list-style-type: none"> • None • Posted Invoice Generated • Processing • Ready for Invoice Generation
InvoiceMatchingRefKeyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Indicates the product or Asset ID. This key, combined with the account, currency, and legal entity, is used to find a matching invoice. The invoice lines converted from debit memo lines are then added to this matched invoice.</p> <p>This field is a polymorphic relationship field.</p> <p>Relationship Name InvoiceMatchingRefKey</p> <p>Refers To Asset, Product2</p>
InvoiceMatchingRefName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Indicates the product's name. This text, combined with the account, currency, and legal entity, is used to find a matching invoice. The invoice lines converted from debit memo lines are then added to this matched invoice.</p>
IsManuallyProcessed	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the debit memo lines of the debit memo are converted to invoice lines manually (<code>true</code>) or not (<code>false</code>).</p> <p>The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	<p>Description</p> <p>The timestamp when the current user last accessed a debit memo address group record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type</p> <p>dateTime</p> <p>Properties</p> <p>Filter, Nillable, Sort</p> <p>Description</p> <p>The timestamp when the current user last viewed a debit memo address record. If this value is null, it's possible that the user only accessed the debit memo address record or a related list view (<code>LastReferencedDate</code>), but not viewed the debit memo address record itself.</p>
LegalEntityId	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p>Description</p> <p>The legal entity record that's related to the debit memo.</p> <p>This field is a relationship field.</p> <p>Relationship Name</p> <p>LegalEntity</p> <p>Refers To</p> <p>LegalEntity</p>
NextBillingDate	<p>Type</p> <p>date</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p>Description</p> <p>The date indicates when the next billing period begins for the debit memo. This date is used to determine when invoices are created for the debit memos. When the invoice scheduler or API evaluates debit memos to generate invoices, those with a next billing date on or before the user-specified target date are included in the invoice batch run.</p>
OwnerId	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description</p> <p>The ID of the owner of this object.</p> <p>This field is a polymorphic relationship field.</p>

Field	Details
	<p>Relationship Name Owner</p> <p>Refers To Group, User</p>
PostedDate	<p>Type date</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The date when the debit memo is posted.</p>
ReasonCode	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies a dynamic picklist of reasons for generating debit memos.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The status of the debit memo. Valid values are:</p> <ul style="list-style-type: none"> • Canceled • Draft • Posted • Void
TotalChargeAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The sum of the charge amount field values of the debit memo lines. This field is a calculated field.</p>

Associated Objects

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

DebitMemoFeed on page 2171

Feed tracking is available for the object.

DebitMemoHistory on page 2178

History is available for tracked fields of the object.

DebitMemoOwnerSharingRule on page 2180


Sharing rules are available for the object.

DebitMemoShare on page 2182

Sharing is available for the object.

DebitMemoAddress

Represents the buyer's address information, which is used to determine the tax amount for a buyer when a debit memo is issued. This object is available in API version 65.0 and later.

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

Supported Calls

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

Special Access Rules

You need Revenue Cloud Billing license and one of these permission sets to access this object.

- Billing Admin permission set
- Billing Operations User permission set
- Payments Admin permission set
- Payments Operation User permission set
- Credit Memo Operations User permission set

Fields

Field	Details
Address	<p>Type address</p> <p>Properties Filter</p> <p>Description The billing or shipping address of the debit memo.</p>

Field	Details
DebitMemoAddressNumber	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description The auto-generated reference number for the debit memo address.</p>
DebitMemoId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The ID of the debit memo associated with the address. This field is a relationship field.</p> <p>Relationship Name DebitMemo</p> <p>Relationship Type Master-detail</p> <p>Refers To DebitMemo (the master object)</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed a debit memo address record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed a debit memo address record. If this value is null, it's possible that the user only accessed the debit memo address record or a related list view (<code>LastReferencedDate</code>), but not viewed the debit memo address record itself.</p>

Associated Objects


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

[DebitMemoAddressHistory](#) on page 2178

History is available for tracked fields of the object.

DebitMemoLine

Represents the additional charge amount that the buyer must pay for the product, service, or debit memo line tax that's related to the debit memo. This object is available in API version 65.0 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()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `search()`, `update()`, `upsert()`

Special Access Rules

You need Revenue Cloud Billing license and one of these permission sets to access this object.

- Billing Admin permission set
- Billing Operations User permission set
- Payments Admin permission set
- Payments Operation User permission set
- Credit Memo Operations User permission set

Fields

Field	Details
BillingAddressId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The billing address record that's related to the debit memo line. This field is a relationship field.</p> <p>Relationship Name BillingAddress</p> <p>Refers To DebitMemoAddress</p>

Field	Details
ChargeAmount	<p>Type currency</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The amount of the debit memo line item.</p>
CorpCurrencyCnvChargeAmt	<p>Type double</p> <p>Properties Filter, Nillable, Sort, Update</p> <p>Description The charge amount of the debit memo line in corporate currency.</p>
CorporateCurrencyCvsnDate	<p>Type date</p> <p>Properties Filter, Group, Nillable, Sort, Update</p> <p>Description The date on which the debit memo line amounts are converted into corporate currency.</p>
CorporateCurrencyCvsnRate	<p>Type double</p> <p>Properties Filter, Nillable, Sort, Update</p> <p>Description The exchange rate that's used to convert debit memo line amounts into corporate currency.</p>
CorporateCurrencyIsoCode	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort, Update</p> <p>Description The currency ISO code of the corporate currency.</p>
DebitMemoId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The parent debit memo record that's related to the debit memo line record.</p>

Field	Details
	<p>This field is a relationship field.</p> <p>Relationship Name DebitMemo</p> <p>Relationship Type Master-detail</p> <p>Refers To DebitMemo (the master object)</p>
Description	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The description of the debit memo line.</p>
EndDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The end date of the debit memo line that determines which billing cycle it must be associated with.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed a debit memo address record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed a debit memo address record. If this value is null, it's possible that the user only accessed the debit memo address record or a related list view (<code>LastReferencedDate</code>), but not viewed the debit memo address record itself.</p>
LegalEntityAccountingPeriodId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The legal entity accounting period record that's related to the debit memo line. This field is a relationship field.</p> <p>Relationship Name LegalEntityAccountingPeriod</p> <p>Refers To LegalEntyAccountingPeriod</p>
LegalEntityId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The legal entity record that's related to the debit memo line. This field is a relationship field.</p> <p>Relationship Name LegalEntity</p> <p>Refers To LegalEntity</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description An auto-generated name assigned to the debit memo line.</p>
Product2Id	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the product or service being debited in the debit memo line. This field is a relationship field.</p> <p>Relationship Name Product2</p> <p>Refers To Product2</p>

Field	Details
ReferenceRecordId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The record ID associated with the debit memo line record. The record ID is an asset, invoice line, contract, or refund record. This field is a polymorphic relationship field.</p> <p>Relationship Name ReferenceRecord</p> <p>Refers To Asset, Contract, InvoiceLine, Refund</p>
ShippingAddressId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The shipping address record that's related to the debit memo line. This field is a relationship field.</p> <p>Relationship Name ShippingAddress</p> <p>Refers To DebitMemoAddress</p>
StartDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The start date of the debit memo line that determines which billing cycle it must be associated with.</p>
TaxTreatmentId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the tax treatment record that's related to the debit memo line. This field is a relationship field.</p>

Field	Details
	<p>Relationship Name TaxTreatment</p> <p>Refers To TaxTreatment</p>

Associated Objects

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

DebitMemoLineFeed on page 2171

Feed tracking is available for the object.

DebitMemoLineHistory on page 2178

History is available for tracked fields of the object.

GeneralLedgerAccount

Represents information about the accounting codes, types, and names that are used to store and organize financial transactions. 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

You need Revenue Cloud Billing license and the Accounts Receivables Admin permission set to access this object.

Fields

Field	Details
AccountingCode	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The code that's used to organize information about the general ledger account.</p>
AccountingName	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The user-specified name for the general ledger account.</p>
AccountingType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The accounting type for the general ledger account.</p>
Description	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Additional details about the general ledger account.</p>
FinancialStatement	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The financial statement that's created by using the information from the general ledger account.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferencedDate</code> is not null, the user accessed this record or list view indirectly.</p>

Field	Details
LegalEntityId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The legal entity that's related to the general ledger account. This field is a relationship field.</p> <p>Relationship Name LegalEntity</p> <p>Refers To LegalEntity</p>
Name	<p>Type string</p> <p>Properties Filter, Group, idLookup, Sort</p> <p>Description An auto-generated name identifying the general ledger account, which is a combination of the accounting code and the account name.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the owner of this object or ID of the creator of this object. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Specifies the accounting type for the general ledger account. This field is available in API version 65.0 and later. Valid values are:</p> <ul style="list-style-type: none"> • Asset

Field	Details
	<ul style="list-style-type: none"> • Liability • Equity • Revenue • Expense • Others

GeneralLedgerAcctAsgntRule

Represents information about the rule based on which general ledger accounts are assigned to transaction journals that are created for billing transactions. 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

You need Revenue Cloud Billing license and the Accounts Receivables Admin permission set to access this object.

Fields

Field	Details
CreditGeneralLedgerAccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The general ledger account for a credit transaction that's related to the general ledger account assignment rule. This field is a relationship field.</p> <p>Relationship Name CreditGeneralLedgerAccount</p> <p>Refers To GeneralLedgerAccount</p>
CurrencyIsoCode	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p>

Field	Details
	<p>Description</p> <p>The currency code of the general ledger account assignment rule for Salesforce orgs with multicurrency enabled.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • AUD—Australian Dollar • EUR—Euro • SGD—Singapore Dollar • USD—U.S. Dollar <p>The default value is USD.</p>
DebitGeneralLedgerAccountId	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p>Description</p> <p>The general ledger account for a debit transaction that's related to the general ledger account assignment rule.</p> <p>This field is a relationship field.</p> <p>Relationship Name</p> <p>DebitGeneralLedgerAccount</p> <p>Refers To</p> <p>GeneralLedgerAccount</p>
FilterCriteria	<p>Type</p> <p>picklist</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description</p> <p>The filter criteria for the general ledger account assignment rule.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • All • Any • Custom
FilterLogic	<p>Type</p> <p>string</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p>


Field	Details
	<p>Description</p> <p>The filter logic for the general ledger account assignment rule when the filter criteria is <code>Custom</code>. Transaction journals are created for the transactions of the selected type that meet the defined filter logic.</p>
<code>LastReferencedDate</code>	<p>Type</p> <p>dateTime</p> <p>Properties</p> <p>Filter, Nillable, Sort</p> <p>Description</p> <p>The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
<code>LastViewedDate</code>	<p>Type</p> <p>dateTime</p> <p>Properties</p> <p>Filter, Nillable, Sort</p> <p>Description</p> <p>The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
<code>LegalEntityId</code>	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p>Description</p> <p>The legal entity that's related to the general ledger account assignment rule.</p> <p>This field is a relationship field.</p> <p>Relationship Name</p> <p>LegalEntity</p> <p>Refers To</p> <p>LegalEntity</p>
<code>Name</code>	<p>Type</p> <p>string</p> <p>Properties</p> <p>Create, Filter, Group, idLookup, Sort, Update</p> <p>Description</p> <p>A user-defined name for the general ledger account assignment rule.</p>
<code>OwnerId</code>	<p>Type</p> <p>reference</p>

Field	Details
	<p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description The ID of the owner of the general ledger account assignment rule record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
Priority	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The priority of the general ledger account assignment rule when there are multiple general ledger account assignment rules defined for a transaction type.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The status of the general ledger account assignment rule. Valid values are:</p> <ul style="list-style-type: none"> • Active • Inactive
TransactionAmountField	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The amount field on the transaction type that's used to record the credit or debit amount in the transaction journals that are generated for that specific transaction type. This field is available in API version 64.0 and later.</p>
TransactionType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p>

Field	Details
	<p data-bbox="519 262 649 294">Description</p> <p data-bbox="519 304 1347 336">The transaction type that's related to the general ledger account assignment rule.</p> <p data-bbox="519 346 730 378">Valid values are:</p> <ul data-bbox="568 388 1331 987" style="list-style-type: none"> <li data-bbox="568 388 763 420">• CreditMemo <li data-bbox="568 430 974 462">• CreditMemoInvApplication <li data-bbox="568 472 828 504">• CreditMemoLine <li data-bbox="568 514 990 546">• CreditMemoLineInvoiceLine <li data-bbox="568 556 876 588">• CreditMemoLineTax <li data-bbox="568 598 1201 630">• DebitMemoLine—Available in API version 65.0 and later. <li data-bbox="568 640 714 672">• Invoice <li data-bbox="568 682 779 714">• InvoiceLine <li data-bbox="568 724 828 756">• InvoiceLineTax <li data-bbox="568 766 1104 798">• Payment—Available in API version 64.0 and later. <li data-bbox="568 808 1266 840">• PaymentLineInvoice—Available in API version 64.0 and later. <li data-bbox="568 850 1331 882">• PaymentLineInvoiceLine—Available in API version 64.0 and later. <li data-bbox="568 892 1088 924">• Refund—Available in API version 64.0 and later. <li data-bbox="568 934 1250 966">• RefundLinePayment—Available in API version 64.0 and later.

GeneralLdgrAcctPrdSummary

Represents a junction between a general ledger account and a legal entity accounting period. Stores information about the total credit amount, total debit amount, opening balance, and closing balance of a general ledger account for a specific legal entity accounting period. This object is available in API version 65.0 and later.

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

Supported Calls

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

Special Access Rules

You need Revenue Cloud Billing license and the Accounts Receivables Admin permission set to access this object.

Fields

Field	Details
ClosingBalanceAmount	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The closing balance amount for a general ledger accounting period summary is calculated based on the general ledger account's type. For asset and expense type general ledger accounts, it's the opening balance amount plus total debit amount minus total credit amount. For liability, equity, and revenue type general ledger accounts, it's the opening balance amount plus total credit amount minus total debit amount.</p>
GeneralLedgerAccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The general ledger account that's related to the general ledger accounting period summary. This field is a relationship field.</p> <p>Relationship Name GeneralLedgerAccount</p> <p>Relationship Type Master-detail</p> <p>Refers To GeneralLedgerAccount (the master object)</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed general ledger accounting period summary record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	<p>Description</p> <p>The timestamp when the current user last viewed general ledger accounting period summary record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
<code>LegalEntityAccountingPeriodId</code>	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Create, Filter, Group, Sort</p> <p>Description</p> <p>The legal entity accounting period that's related to the general ledger account.</p> <p>This field is a relationship field.</p> <p>Relationship Name</p> <p>LegalEntityAccountingPeriod</p> <p>Refers To</p> <p>LegalEntyAccountingPeriod</p>
<code>OpeningBalanceAmount</code>	<p>Type</p> <p>currency</p> <p>Properties</p> <p>Create, Filter, Sort, Update</p> <p>Description</p> <p>The opening balance is the same as the closing balance of the previous general ledger account period summary.</p>
<code>TotalCreditAmount</code>	<p>Type</p> <p>currency</p> <p>Properties</p> <p>Create, Filter, Sort, Update</p> <p>Description</p> <p>The sum of the credit fields from all transaction journals of the general ledger account for a specific legal entity accounting period.</p>
<code>TotalDebitAmount</code>	<p>Type</p> <p>currency</p> <p>Properties</p> <p>Create, Filter, Sort, Update</p> <p>Description</p> <p>The sum of the debit fields from all transaction journals of the general ledger account for a specific legal entity accounting period.</p>

GeneralLedgerJrnlEntryRule

Represents information about the transaction journal entry rule, based on which transaction journals are created for the selected credit and debit general ledger accounts, transaction amount field, and percentage. This object is available in API version 65.0 and later.

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

Supported Calls

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

Special Access Rules

You need Revenue Cloud Billing license and the Accounts Receivables Admin permission set to access this object.

Fields

Field	Details
CreditGeneralLedgerAccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The general ledger account for a credit transaction. This field is a relationship field.</p> <p>Relationship Name CreditGeneralLedgerAccount</p> <p>Refers To GeneralLedgerAccount</p>
DebitGeneralLedgerAccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The general ledger account for a debit transaction. This field is a relationship field.</p> <p>Relationship Name DebitGeneralLedgerAccount</p> <p>Refers To GeneralLedgerAccount</p>

Field	Details
GeneralLedgerAcctAsgntRuleId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description The general ledger account assignment rule that's related to the general ledger journal entry rule. This field is a relationship field.</p> <p>Relationship Name GeneralLedgerAcctAsgntRule</p> <p>Relationship Type Master-detail</p> <p>Refers To GeneralLedgerAcctAsgntRule (the master object)</p>
Percentage	<p>Type percent</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The percentage of the amount field value that's used to record the credit or debit amount in the transaction journals generated for the general ledger journal entry rule.</p>
TransactionAmountField	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description The amount field on the transaction type that's used to record the credit or debit amount in the transaction journals generated for that specific transaction type.</p>

InvBatchDraftToPostedRun

Represents information about the batch job that posts all invoices with the status as `Draft` that are generated by the invoice batch run associated with the billing schedule. This object is available in API version 62.0 and later.



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

Supported Calls

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

Special Access Rules

You need the Billing Operations User permission set to access this object.

Fields

Field	Details
Comments	<p>Type textarea</p> <p>Properties Filter, Nillable, Sort, Update</p> <p>Description Additional notes or comments for the invoice batch draft to posted run record.</p>
CompletionDateTime	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The completion date and time of this invoice batch draft to posted run process.</p>
CreditApplicationStatus	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description The status of a credit application to the invoices that are posted by the invoice batch draft to posted run process.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> Completed Failed NotApplicable
InvBatchDraftToPostedRunNumber	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Required. The auto-generated number of the invoice batch draft to posted run record.</p>
InvoiceBatchRunId	<p>Type reference</p>

Field	Details
	<p>Properties Filter, Group, Sort</p> <p>Description Required. The ID of the invoice batch run record associated with the invoice batch draft to posted run record. This field is a relationship field.</p> <p>Relationship Name InvoiceBatchRun</p> <p>Relationship Type Master-detail</p> <p>Refers To InvoiceBatchRun (the master object)</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed an invoice batch draft to posted run record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed an invoice batch draft to posted run record. If this value is null, it's possible that the user only accessed the invoice batch draft to posted run record or a related list view (<code>LastReferencedDate</code>), but not viewed the invoice batch draft to posted run record itself.</p>
StartDateTime	<p>Type dateTime</p> <p>Properties Filter, Sort</p> <p>Description Required. The start date and time of the invoice batch draft to posted run process.</p>
Status	<p>Type picklist</p> <p>Properties Defaulted on create, Filter, Group, Restricted picklist, Sort</p>

Field	Details
	<p>Description Required. The status of the invoice batch draft to posted run record.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> Completed CompletedWithErrors Failed Started <p>The default value is Started.</p>
TotalDraftInvoicesSelected	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The total number of invoices that are selected to be processed by the invoice batch draft to posted run process.</p>
TotalInvoiceAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The total amount of all the invoices posted by the invoice batch draft to posted run process.</p>
TotalInvoicesFailed	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The total number of invoices that the invoice batch draft to posted run process failed to post.</p>
TotalPostedInvoices	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The total number of invoices posted by the invoice batch draft to posted run process.</p>

Invoice

Represents information about a financial document describing the total amount a buyer must pay for provided products or services. This object is available in API version 62.0 and later.

Supported Calls

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

Special Access Rules

You need the Billing Operations User permission set to access this object.

Fields

Field	Details
Balance	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The outstanding balance of an invoice. The balance is equal to the invoice's total amount with tax, excluding payments and adjustments.</p>
BalanceValue	<p>Type double</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The balance value is derived from an existing balance field in an invoice. Available in API version 65.0 and later. This field is a calculated field.</p>
BillToContactId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The bill to contact ID of the account that's related to an invoice. This field is a relationship field.</p> <p>Relationship Name BillToContact</p>

Field	Details
	<p>Refers To Contact</p>
BillingAccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. The ID of the customer account related to an invoice. This field is a relationship field.</p> <p>Relationship Name BillingAccount</p> <p>Refers To Account</p>
CorpCrcyCnvTotAmtWithTax	<p>Type double</p> <p>Properties Filter, Nillable, Sort, Update</p> <p>Description The sum of the total amount with tax on the related invoice lines in corporate currency. Available in API version 63.0 and later.</p>
CorporateCurrencyCvsnDate	<p>Type date</p> <p>Properties Filter, Group, Nillable, Sort, Update</p> <p>Description The date on which the invoice's total amount with tax was converted to the corporate currency. Available in API version 63.0 and later.</p>
CorporateCurrencyCvsnRate	<p>Type double</p> <p>Properties Filter, Nillable, Sort, Update</p> <p>Description The exchange rate that's used to convert invoice's total amount with tax to the corporate currency. Available in API version 63.0 and later.</p>
CorporateCurrencyIsoCode	<p>Type string</p>

Field	Details
	<p>Properties Filter, Group, Nillable, Sort, Update</p> <p>Description The currency ISO code of the corporate currency. Available in API version 63.0 and later.</p>
DaysInvoiceOpen	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The number of days from the day an invoice was created to the day it was paid. This field is a calculated field.</p>
DaysInvoiceOverdue	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The number of days since the date when the payment for an invoice was due. This field is a calculated field.</p>
Description	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Additional details about the invoice.</p>
DocumentNumber	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Required. An auto-generated number identifying an invoice.</p>
DueDate	<p>Type date</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. The date by when the customer must pay an invoice.</p>

Field	Details
FullSettlementDate	<p>Type date</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The date when the customer has paid an invoice in full.</p>
InvBatchDraftToPostedRunId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The ID of the invoice batch to posted run record that generated a posted invoice from a draft invoice. This field is a relationship field.</p> <p>Relationship Name InvBatchDraftToPostedRun</p> <p>Refers To InvBatchDraftToPostedRun</p>
InvoiceBatchRunId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the invoice batch run record that generated an invoice. This field is a relationship field.</p> <p>Relationship Name InvoiceBatchRun</p> <p>Refers To InvoiceBatchRun</p>
InvoiceDate	<p>Type date</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. The date when an invoice was posted. The payment term's net is added to this date to calculate the invoice's due date. For example, an invoice with an invoice date of 04/01 and the related payment term's period as 30 days has a due date of 05/01.</p>

Field	Details
InvoiceLockedDateTime	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date and time at which an invoice is locked.</p>
InvoiceNumber	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Required. The user-specified reference number for the invoice.</p>
IsBillingScheduleGroupSkipped	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the invoice is generated from a billing transaction directly and if the billing schedule group wasn't created for the transaction (<code>true</code>), or if the invoice is generated from the billing schedule group that was created for the transaction (<code>false</code>). The default value is <code>false</code>. Available in API version 63.0 and later.</p>
IsInvoiceLocked	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Required. Indicates whether an invoice is locked for editing or not (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
LastEmailDispatchStatus	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Indicates the dispatch status of the last email that was sent for the invoice. Available in API version 65.0 and later. Valid values are:</p> <ul style="list-style-type: none"> Failed

Field	Details
	<ul style="list-style-type: none"> • Sent With Invoice Document • Sent Without Invoice Document
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed an invoice record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed an invoice record. If this value is null, it's possible that the user only accessed the invoice record or a related list view (<code>LastReferencedDate</code>), but not viewed the invoice record itself.</p>
LegalEntityAccountingPeriodId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort, Update</p> <p>Description The legal entity accounting period record that's related to the invoice. Available in API version 65.0 and later. This field is a relationship field.</p> <p>Relationship Name LegalEntityAccountingPeriod</p> <p>Refers To LegalEntyAccountingPeriod</p>
LegalEntityId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort, Update</p> <p>Description The legal entity used in this invoice. Available in API version 65.0 and later. This field is a relationship field.</p>

Field	Details
	<p>Relationship Name LegalEntity</p> <p>Refers To LegalEntity</p>
NetCreditsApplied	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The net credits applied to an invoice. This amount is calculated by subtracting the sum of all the unapplied lines from the sum of all the applied lines. This field is a calculated field.</p>
NetPaymentsApplied	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The net payments applied to an invoice. This field is visible from API version 62.0 but can only be used from API version 64.0 and later with the Revenue Cloud Billing license. This field is a calculated field.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Required. The ID of the user who owns an Invoice record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
PaymentExclusionReason	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p>

Field	Details
	<p>Description</p> <p>The reason for skipping the creation of payment schedules and payment schedule items for the invoice. Available in API version 64.0 and later with the Revenue Cloud Billing license.</p>
PaymentTermId	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p>Description</p> <p>The payment term used for an invoice.</p> <p>This field is a relationship field.</p> <p>Relationship Name</p> <p>PaymentTerm</p> <p>Refers To</p> <p>PaymentTerm</p>
PostedDate	<p>Type</p> <p>date</p> <p>Properties</p> <p>Filter, Group, Nillable, Sort</p> <p>Description</p> <p>The date when an invoice was posted.</p>
ReferenceEntityId	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Filter, Group, Nillable, Sort, Update</p> <p>Description</p> <p>The ID of the Order record or Credit Memo record that created an invoice.</p> <p>This field is a polymorphic relationship field.</p> <p>Relationship Name</p> <p>ReferenceEntity</p> <p>Refers To</p> <p>CreditMemo, Order</p>
SavedPaymentMethodId	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Filter, Group, Nillable, Sort</p>

Field	Details
	<p>Description The ID of the Saved Payment Method record that's used for the invoice. Available in API version 64.0 and later with the Revenue Cloud Billing license.</p> <p>This field is a relationship field.</p> <p>Relationship Name SavedPaymentMethod</p> <p>Refers To SavedPaymentMethod</p>
SequencePolicyId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The sequence policy associated with the invoice. Available in API version 65.0 and later.</p> <p>This field is a relationship field.</p> <p>Relationship Name SequencePolicy</p> <p>Refers To SequencePolicy</p>
SettlementLevel	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description The level at which the credit was applied.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • Invoice • InvoiceLine
SettlementStatus	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description The status of an invoice's payment.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • Not Applicable • Not Settled

Field	Details
	<ul style="list-style-type: none"> Partially Settled Settled
ShouldExcludePayment	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates whether to skip creating payment schedules and payment schedule items for the invoice (<code>true</code>). Available in API version 64.0 and later with the Revenue Cloud Billing license. The default value is <code>false</code>.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Required. The status of an invoice. Valid values are:</p> <ul style="list-style-type: none"> <code>Canceled</code>— Indicates that the invoice was generated and later canceled. <code>Draft</code>— Indicates that the invoice is a draft. <code>Draft In Progress</code>— Indicates that the draft invoice is in progress. <code>Error</code>— Indicates that an error occurred when processing the invoice. <code>Pending</code>— Indicates that the invoice is being processed. <code>Posted</code>— Indicates that the invoice has been generated and sent to the customer. <code>Posting In Progress</code>—Indicates that the invoice posting is in progress. <code>Void In Progress</code>—Indicates that the invoice is pending a status change. <code>Voided</code>—The invoice's status after the API successfully voids the invoice.
TotalAdjustmentAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The sum of the invoice's adjustment line amounts. This field is a calculated field.</p>
TotalAdjustmentAmountWithTax	<p>Type currency</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The sum of the invoice's adjustment line amounts, including tax.</p>
TotalAdjustmentTaxAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The total amount of tax applied to the invoice line's adjustment lines.</p>
TotalAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The sum of the total amount on the invoice's lines. This field is a calculated field.</p>
TotalAmountWithTax	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The sum of the total amount with tax on the invoice's lines. This field is a calculated field.</p>
TotalChargeAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The sum of the amount fields on the invoice's charge-type invoice lines. This field is a calculated field.</p>
TotalChargeAmountWithTax	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	<p>Description The sum of the amount fields on the invoice's charge-type invoice lines, including tax.</p>
TotalChargeTaxAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The total amount of tax applied to the invoice's charge lines.</p>
TotalConvertedNegAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The sum of all negative invoice lines that were converted to a credit memo. For example, if one negative invoice line was for -\$10 and one was for -\$15, the total amount that's converted to a credit memo is -\$25. This field is a calculated field.</p>
TotalTaxAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The sum of the tax amount on the invoice lines. This field is a calculated field.</p>
UniqueIdentifier	<p>Type string</p> <p>Properties Filter, Group, idLookup, Nillable, Sort</p> <p>Description The unique identifier of an externally ingested invoice that's used to ensure that duplicate invoices aren't inserted. Available in API version 63.0 and later.</p>
WriteOffStatus	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p>

Field	Details
	<p>Description</p> <p>The status of the invoice write-off request.</p> <p>This field is unique within your organization.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> Completed Failed InProgress <p>Available in API version 64.0 and later. This field is available in API version 64.0 and later with the Revenue Cloud Billing license.</p>
WriteOffTotalChargeAmount	<p>Type</p> <p>currency</p> <p>Properties</p> <p>Filter, Nillable, Sort</p> <p>Description</p> <p>The total charge amount of the invoice that's written off.</p> <p>This field is unique within your organization. This field is available in API version 64.0 and later with the Revenue Cloud Billing license.</p>
WriteOffTotalTaxAmount	<p>Type</p> <p>currency</p> <p>Properties</p> <p>Filter, Nillable, Sort</p> <p>Description</p> <p>The total tax amount of the invoice that's written off.</p> <p>This field is unique within your organization. This field is available in API version 64.0 and later with the Revenue Cloud Billing license.</p>

Associated Objects

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

[InvoiceFeed](#) on page 2171

Feed tracking is available for the object.

[InvoiceHistory](#) on page 2178

History is available for tracked fields of the object.

[InvoiceShare](#) on page 2182

Sharing is available for the object.

InvoiceAddressGroup

Represents the storage of the buyer's address information. This object is available in API version 62.0 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

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

Special Access Rules

You need the Billing Operations User permission set to access this object.

Fields

Field	Details
Address	<p>Type address</p> <p>Properties Filter, Nillable</p> <p>Description The buyer's address. See Compound Field Considerations and Limitations for details on geolocation compound fields.</p>
InvoiceAddressGroupNumber	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Required. The auto-generated reference number for the invoice address group.</p>
InvoiceId	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description Required. The ID of the invoice associated with the address group. This field is a relationship field.</p> <p>Relationship Name Invoice</p>

Field	Details
	<p>Relationship Type Master-detail</p> <p>Refers To Invoice (the master object)</p>

InvoiceBatchRun

Represents a batch processing job in Billing. During an invoice batch run, all billing schedules that meet the specified criteria are processed, resulting in the generation of invoices. This object is available in API version 62.0 and later.

Supported Calls

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

Special Access Rules

You need the Billing Admin permission set to access this object.

Fields

Field	Details
<code>BillingBatchSchedulerId</code>	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description Required. The ID of the related billing batch scheduler. This field is a relationship field.</p> <p>Relationship Name BillingBatchScheduler</p> <p>Refers To BillingBatchScheduler</p>
<code>Comments</code>	<p>Type textarea</p> <p>Properties Filter, Nillable, Sort, Update</p> <p>Description Additional notes or comments for the invoice batch run.</p>

Field	Details
CompletionTime	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the invoice batch run finished processing.</p>
CreditApplicationStatus	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description The status of applying credit memos or credit memo lines to invoices or invoice lines during invoices batch runs. Valid values are:</p> <ul style="list-style-type: none"> • Completed • Failed • NotApplicable
DocGenCompletionTime	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The completion time of generating invoice documents by the invoice batch run. This field is available in API version 63.0 and later with Revenue Cloud Billing license.</p>
DocGenStartTime	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The start time of generating invoice documents by the invoice batch run. This field is available in API version 63.0 and later with Revenue Cloud Billing license.</p>
DocGenStatus	<p>Type picklist</p> <p>Properties Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description The status of the invoice documents generated by the invoice batch run.</p>

Field	Details
	<p>Valid values are:</p> <ul style="list-style-type: none"> • Canceled • Completed • Failed • In Progress • Not Started • Paused <p>The default value is Not Started.</p> <p>This field is available in API version 63.0 and later with Revenue Cloud Billing license.</p>
InvoiceBatchRunNumber	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Required. The auto-generated reference number for the invoice batch run.</p>
InvoiceDocsGenFailed	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The number of invoice documents that the invoice batch run failed to generate. This field is available in API version 63.0 and later with Revenue Cloud Billing license.</p>
InvoiceDocsGenerated	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The number of invoice documents that the invoice batch run generated. This field is available in API version 63.0 and later with Revenue Cloud Billing license.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed an invoice batch run record indirectly, for example, through a list view or related record.</p>

Field	Details
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed an invoice batch run record. If this value is null, it's possible that the user only accessed the invoice batch run record or a related list view (<code>LastReferencedDate</code>), but not viewed the invoice batch run record itself.</p>
OwnerId	<p>Type reference</p> <p>Properties Filter, Group, Sort, Update</p> <p>Description Required. The ID of the user who created the related billing batch scheduler. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
RecoveryStatus	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description The status of the invoice batch run recovery process. Valid values are:</p> <ul style="list-style-type: none"> • <code>CompletelyRecovered</code>—All billing schedules included in the recovery run were reset to <code>Ready for Invoicing</code>. These billing schedules are included in the next scheduled invoice batch run. • <code>PartiallyRecovered</code>—Some, but not all, billing schedules that were part of the recovery run were reset to <code>Ready for Invoicing</code>. The billing schedules that were recovered are included in the next scheduled invoice batch run. The billing schedules that weren't successfully recovered must be manually reset to <code>Ready for Invoicing</code> so they can be processed. • <code>RecoveryFailed</code>—The recovery job was unsuccessful. • <code>RecoveryStarted</code>—The recovery job is in progress.
StartTime	<p>Type dateTime</p>

Field	Details
	<p>Properties Filter, Sort</p> <p>Description Required. The timestamp when the invoice batch run started processing.</p>
Status	<p>Type picklist</p> <p>Properties Defaulted on create, Filter, Group, Restricted picklist, Sort</p> <p>Description Required. The status of the invoice batch run. Valid values are:</p> <ul style="list-style-type: none"> • Canceled • Completed • Failed • Started • Stopped <p>The default value is <code>Started</code>.</p>
StatusSubtype	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description The status subtype of the invoice batch run. The subtype corresponds to the status of the invoice batch run. Valid values are:</p> <ul style="list-style-type: none"> • <code>Billing Schedules Filtering Started</code>—The data processing engine (DPE) selection service has started. The selection service includes the Billing Schedule records that meet the conditions defined when scheduling the invoice run. • <code>Filter Billing Schedules for Generating Invoices DPE Definition Run In Progress</code>—The selection DPE was created and initiated for execution. • <code>Filter Billing Schedules for Generating Invoices DPE Definition Run Completed</code>—The selection DPE was completed and a message was sent to the platform events handler. • <code>Invoice Generation Started</code>—The invoice generation service has started. • <code>Generate Invoices for Billing Schedules DPE Definition Run In Progress</code>—The invoice generation DPE was created and initiated for execution.

Field	Details
	<ul style="list-style-type: none"> • <code>Generate Invoices for Billing Schedules DPE Definition Run Completed</code>—The invoice generation DPE was completed and a message was sent to the platform events handler. • <code>Invoice Tax Calculation In Progress</code>—The tax calculation step has started. • <code>Billing Schedule and Billing Schedule Group Updates In Progress</code>—The post processing step has started. • <code>Invoice Generation Summarization In Progress</code>—The invoice generation summarization step has started. • <code>Completed</code>—The invoice batch run has completed successfully. • <code>Failed</code>—The invoice batch run was unsuccessful. <p>Available in API version 63.0 and later.</p>
<code>TotBillSchdUpdtDurDrftToPost</code>	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The total duration taken to update the billing schedule from <code>Draft</code> to <code>Posted</code> status during an invoice batch run.</p>
<code>TotalBillSchedRecovered</code>	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The number of billing schedules that were a part of the recovery run that were reset to <code>Ready for Invoicing</code>. These billing schedules are included in the next scheduled invoice batch run.</p>
<code>TotalBillSchedUnrecovered</code>	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The number of billing schedules that were a part of the recovery run that weren't reset to <code>Ready for Invoicing</code>. These billing schedules that weren't successfully recovered must be manually reset to <code>Ready for Invoicing</code> so they can be processed.</p>
<code>TotalBillingSchedulesFailed</code>	<p>Type int</p>

Field	Details
	<p>Properties Filter, Group, Nillable, Sort</p> <p>Description The total number of billing schedules that weren't successfully processed. When a billing schedule isn't successfully processed, then the system doesn't generate an invoice for it. For details about errors, check the Revenue Transaction Error Log.</p>
TotalBsSuccessfullyProcessed	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The total number of billing schedules for which the system was able to generate and process invoices.</p>
TotalDraftInvoiceAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The total amount of all invoices in the <code>Draft</code> status.</p>
TotalDraftInvoices	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The total number of invoices in the <code>Draft</code> status.</p>
TotalFilteredBillingSchedules	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The total number of billing schedules that met the invoice run scheduler's matching criteria. The matching criteria specify which billing schedules are included in the invoice batch run. The field label is Total Matching Billing Schedules.</p>
TotalInvSuccessfullyProcessed	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p>

Field	Details
	<p>Description The total number of invoices that were successfully processed.</p>
TotalInvoicedAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The total amount of income including taxes that's represented by the successfully processed invoices.</p>
TotalInvoicesCanceled	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The total number of invoices that weren't processed. To find out what went wrong, check the Revenue Transaction Error Log. Then fix the errors and run the invoice batch run recovery process.</p>
TotalInvoicesFailed	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The total number of invoices that weren't processed successfully. To find out what went wrong, check the Revenue Transaction Error Log. Then fix the errors and run the invoice batch run recovery process.</p>
TotalInvoicesGenerated	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The total number of invoices that were generated from the billing schedules processed by the invoice batch run.</p>
TotalPostedInvoices	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p>

Field	Details
	<p>Description</p> <p>The total number of invoices in <code>Posted</code> status that were generated from the billing schedules.</p>

InvoiceBatchRunCriteria

Represents a batch processing job and its required criteria in Billing. During an invoice batch run, all billing schedules that meet the specified criteria are processed, resulting in the generation of invoices. This object is available in API version 62.0 and later.

Supported Calls

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

Special Access Rules

You need the Billing Admin permission set to access this object.

Fields

Field	Details
<code>Comments</code>	<p>Type</p> <p>textarea</p> <p>Properties</p> <p>Filter, Nillable, Sort</p> <p>Description</p> <p>Additional notes or comments for the invoice batch run criteria.</p>
<code>CriteriaExpression</code>	<p>Type</p> <p>textarea</p> <p>Properties</p> <p>Filter, Nillable, Sort</p> <p>Description</p> <p>The formula that specifies criteria for filtering the billing schedules. For example, you can filter billing schedules by the currency code.</p>
<code>CriteriaMatchType</code>	<p>Type</p> <p>picklist</p> <p>Properties</p> <p>Defaulted on create, Filter, Group, Restricted picklist, Sort</p> <p>Description</p> <p>Required. The type of matching criteria required for the batch.</p>

Field	Details
	<p>Valid value is <code>MatchAll</code>.</p> <p>The default value is <code>MatchAll</code>.</p>
<code>ExpectedInvoiceStatus</code>	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description The type of invoice a batch run generates. Valid values are:</p> <ul style="list-style-type: none"> • Draft • Posted
<code>InvoiceBatchRunCriteriaNumber</code>	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Required. The auto-generated reference number for the invoice batch run criteria.</p>
<code>InvoiceDate</code>	<p>Type date</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The date displayed on the invoice. This date is also used for tax calculations.</p>
<code>InvoiceDateOffset</code>	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The offset that's applied to the target date to calculate the invoice date.</p>
<code>IsInvoiceDateFromRunDate</code>	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Required. Indicates whether the invoice date is derived from the run date (<code>true</code>) or not (<code>false</code>).</p>

Field	Details
	The default value is <code>false</code> . Available in API version 63.0 and later.
OwnerId	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description Required. The ID of the user who created the invoice batch run criteria. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
TargetDate	<p>Type date</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The target date for the invoice run. Billing schedules having the next billing date before this date are picked up for invoicing.</p>
TargetDateOffset	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The offset that's applied to the next run date to calculate the target date.</p>

InvoiceBatchRunRecovery

Represents information about the recovery procedure of an invoice batch run. This object is available in API version 62.0 and later.



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

Supported Calls

`describeLayout()`, `describeObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `update()`

Special Access Rules

You need the Billing Admin permission set to access this object.

Fields

Field	Details
Comments	<p>Type textarea</p> <p>Properties Filter, Nillable, Sort, Update</p> <p>Description Additional notes or comments for the invoice batch run recovery.</p>
CompletionTime	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the invoice batch run recovery finished processing.</p>
InvoiceBatchRunId	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description Required. A unique identifier of the invoice batch run that's related to this recovery run. This field is a relationship field.</p> <p>Relationship Name InvoiceBatchRun</p> <p>Relationship Type Master-detail</p> <p>Refers To InvoiceBatchRun (the master object)</p>
InvoiceBatchRunRecoveryNumber	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Required. A unique identifier of the recovery process for the invoice batch run.</p>

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed an invoice batch run recovery record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed an invoice batch run recovery record. If this value is null, it's possible that the user only accessed the invoice batch run recovery record or a related list view (<code>LastReferencedDate</code>), but not viewed the invoice batch run recovery record itself.</p>
StartTime	<p>Type dateTime</p> <p>Properties Filter, Sort</p> <p>Description Required. The timestamp when the invoice batch run recovery started processing.</p>
Status	<p>Type picklist</p> <p>Properties Defaulted on create, Filter, Group, Restricted picklist, Sort</p> <p>Description Required. The final state of the recovery process for the invoice batch runs. Valid values are:</p> <ul style="list-style-type: none">• <code>Completed</code>• <code>CompletedWithErrors</code>• <code>Failed</code>• <code>Started</code> <p>The default value is <code>Started</code>.</p>

InvoiceDocument

Represents the PDF document generated for an invoice. This object is available in API version 63.0 and later.

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

Supported Calls

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

Special Access Rules

You need Revenue Cloud Billing license, and the Billing Admin permission set or the Billing Operations User permission set to access this object.

Fields

Field	Details
<code>ContentDocumentId</code>	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The ID of the generated PDF document. This field is a relationship field.</p> <p>Relationship Name ContentDocument</p> <p>Refers To ContentDocument</p>
<code>DateGenerated</code>	<p>Type date</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The date on which the PDF is generated.</p>
<code>DocumentGenerationProcessId</code>	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p>

Field	Details
	<p>Description The ID of the document generation process that contains the information used to create the PDF invoice. This field is a relationship field.</p> <p>Relationship Name DocumentGenerationProcess</p> <p>Refers To DocumentGenerationProcess</p>
DocumentNumber	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Required. A unique number assigned to the PDF invoice document.</p>
ErrorMessage	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Any errors that occur during PDF generation.</p>
InvoiceId	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description Required. The ID of the Invoice to which the Invoice Doc is attached. This field is a relationship field.</p> <p>Relationship Name Invoice</p> <p>Relationship Type Master-detail</p> <p>Refers To Invoice (the master object)</p>
Status	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p>

Field	Details
	<p>Description</p> <p>The status of the PDF generation process.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • Blocked • Cancelled • Failure • Pending • 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.

[InvoiceDocumentFeed on page 2171](#)


Feed tracking is available for the object.

[InvoiceDocumentHistory on page 2178](#)

History is available for tracked fields of the object.

InvoiceLine

Represents the amount that a buyer must pay for a product, service, or fee. Invoice lines are created based on the amount of an order line. This object is available in API version 62.0 and later.

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

Supported Calls

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

Special Access Rules

You need the Billing Admin permission set to access this object.

Fields

Field	Details
AdjustmentAmount	<p>Type</p> <p>currency</p>

Field	Details
	<p>Properties Filter, Nillable, Sort, Update</p> <p>Description The sum of adjustments made to the invoice line.</p>
AdjustmentAmountWithTax	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The sum of adjustment amounts, including associated taxes related to the invoice line.</p>
AdjustmentTaxAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The sum of tax adjustments to the invoice line.</p>
Balance	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The outstanding balance for an invoice line. This amount is equal to the invoice's total amount with tax after deducting the payments made.</p>
BillingAddressId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description This field is related to an <code>InvoiceAddressGroup</code> field containing the billing address for the invoice line. For example, one <code>InvoiceAddressGroup</code> field is related to the invoiceLine's <code>BillingAddressID</code> field, and another <code>InvoiceAddressGroup</code> field is related to the invoiceLine's <code>ShippingAddressId</code> field.</p> <p>This field is a relationship field.</p> <p>Relationship Name BillingAddress</p> <p>Refers To InvoiceAddressGroup</p>

Field	Details
BillingScheduleGroupId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the billing schedule group for the invoice line. This field is a relationship field.</p> <p>Relationship Name BillingScheduleGroup</p> <p>Refers To BillingScheduleGroup</p>
BillingScheduleId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the billing schedule for the invoice line. Edit access is enabled for this field. You must not modify this field when the invoice line is related to a posted invoice. This field is a relationship field.</p> <p>Relationship Name BillingSchedule</p> <p>Refers To BillingSchedule</p>
ChargeAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort, Update</p> <p>Description The sum of charges made to the invoice line.</p>
ChargeAmountWithTax	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The amount on a charge invoice line, including tax.</p>
ChargeConvertedNegAmount	<p>Type currency</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The amount on a charge invoice line that's converted to credit.</p>
ChargeTaxAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The tax to be applied on a charge invoice line.</p>
ConvertedNegAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The amount from an invoice line that's converted to credit.</p>
CorpCurrencyCnvChargeAmt	<p>Type double</p> <p>Properties Filter, Nillable, Sort, Update</p> <p>Description The sum of charges made to the invoice line in corporate currency. Available in API version 63.0 and later.</p>
CorpCurrencyCnvTotalTaxAmt	<p>Type double</p> <p>Properties Filter, Nillable, Sort, Update</p> <p>Description The total tax amount of the invoice line in corporate currency. Available in API version 63.0 and later.</p>
CorporateCurrencyCvsnDate	<p>Type date</p> <p>Properties Filter, Group, Nillable, Sort, Update</p> <p>Description The date on which the invoice line amounts are converted to corporate currency. Available in API version 63.0 and later.</p>

Field	Details
CorporateCurrencyCvsnRate	<p>Type double</p> <p>Properties Filter, Nillable, Sort, Update</p> <p>Description The exchange rate that's used to convert the invoice line amounts to corporate currency. Available in API version 63.0 and later.</p>
CorporateCurrencyIsoCode	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort, Update</p> <p>Description The currency ISO code of the corporate currency. Available in API version 63.0 and later.</p>
Description	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort, Update</p> <p>Description The description of the invoice line.</p>
GroupReferenceEntityItemId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the record that the invoice line corresponds to. This field is a polymorphic relationship field.</p> <p>Relationship Name GroupReferenceEntityItem</p> <p>Refers To DebitMemoLine, OrderItem, OrderItemAdjustmentLineItem, OrderItemDetail, QuoteLineDetail, QuoteLineItem</p>
HasMultipleItems	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p>

Field	Details
	<p>Description Required. Indicates whether this field merges items from the same billing period (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
InvoiceId	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description Required. The ID of the invoice record that contains this invoice line. This field is a relationship field.</p> <p>Relationship Name Invoice</p> <p>Relationship Type Master-detail</p> <p>Refers To Invoice (the master object)</p>
InvoiceLineEndDate	<p>Type date</p> <p>Properties Filter, Group, Sort, Update</p> <p>Description Required. The end date of the billing for the service for invoice lines made from a time-based service.</p>
InvoiceLineStartDate	<p>Type date</p> <p>Properties Filter, Group, Sort, Update</p> <p>Description Required. The first date of the billing for the service for invoice lines made from a time-based service.</p>
InvoiceStatus	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The status of the invoice line. This field is inherited from the invoice's status.</p>

Field	Details
IsUsageBasedInvoiceLine	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Required. Indicates whether the product is usage-based (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>. This field is available in API version 63.0 and later with Revenue Cloud Billing license.</p>
LegalEntityAccountingPeriodId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the legal entity accounting period record used in this invoice line. This field is a relationship field.</p> <p>Relationship Name LegalEntityAccountingPeriod</p> <p>Refers To LegalEntityAccountingPeriod</p>
LegalEntityId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the legal entity record used in this invoice line. This field is a relationship field.</p> <p>Relationship Name LegalEntity</p> <p>Refers To LegalEntity</p>
LineAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The amount of the invoice line. This field is a calculated field.</p>

Field	Details
Name	<p>Type string</p> <p>Properties Filter, Group, idLookup, Sort, Update</p> <p>Description Required. The name of the invoice line.</p>
NetCreditsApplied	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The total credit memo line amount applied to the invoice line. This amount is calculated by subtracting the unapplied credit memo line amount from the applied credit memo line amount. This field is a calculated field.</p>
NetPaymentsApplied	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The total payment amount that's applied to the invoice line after unapplication of payments. This amount is calculated by subtracting the unapplied payment line invoice line amount from the applied payment line invoice line amount. Available in API version 61.0 and later. This field is a calculated field.</p>
OverageUnitOfMeasure	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The unit that's used to measure the overage. For example, byte or minute. This field is available in API version 63.0 and later with Revenue Cloud Billing license.</p>
ParentInvoiceLineId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The ID of the parent invoice line record.</p>

Field	Details
	<p>This field is a relationship field.</p> <p>Relationship Name ParentInvoiceLine</p> <p>Refers To InvoiceLine</p>
Product2Id	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the product that was charged or ordered to create the invoice line. This field is a relationship field.</p> <p>Relationship Name Product2</p> <p>Refers To Product2</p>
Quantity	<p>Type double</p> <p>Properties Filter, Nillable, Sort, Update</p> <p>Description The number of units of the order product that created the invoice line.</p>
ReferenceEntityItemId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort, Update</p> <p>Description The order item or adjustment item that created the invoice line. This field is a polymorphic relationship field.</p> <p>Relationship Name ReferenceEntityItem</p> <p>Refers To OrderItem, OrderItemAdjustmentLineItem</p>
ReferenceEntityType	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort, Update</p>

Field	Details
	<p>Description</p> <p>The type of transaction that created the invoice line.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • Delivery Charge • Fee • Order Product
ReferenceEntityItemTypeCode	<p>Type</p> <p>picklist</p> <p>Properties</p> <p>Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description</p> <p>The type of object that created the invoice line.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • Charge • Product
ShipFromAddressId	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Filter, Group, Nillable, Sort</p> <p>Description</p> <p>The shipping origin of the invoiced product. Available in API version 64.0 and later.</p> <p>This field is a relationship field.</p> <p>Relationship Name</p> <p>ShipFromAddress</p> <p>Refers To</p> <p>InvoiceAddressGroup</p>
ShippingAddressId	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Filter, Group, Nillable, Sort</p> <p>Description</p> <p>The ID of the shipping address record associated with the invoice line.</p> <p>This field is a relationship field.</p> <p>Relationship Name</p> <p>ShippingAddress</p> <p>Refers To</p> <p>InvoiceAddressGroup</p>

Field	Details
TaxAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort, Update</p> <p>Description The total tax for the invoice line.</p>
TaxProcessingStatus	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The status of the tax processing of the invoice line. Valid values are:</p> <ul style="list-style-type: none"> • Estimated • Pending • Posted
TaxTreatmentId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The tax treatment used on this invoice line. This field is a relationship field.</p> <p>Relationship Name TaxTreatment</p> <p>Refers To TaxTreatment</p>
Type	<p>Type picklist</p> <p>Properties Filter, Group, Restricted picklist, Sort</p> <p>Description The type of the invoice line. Valid values are:</p> <ul style="list-style-type: none"> • Adjustment • Charge • Tax

Field	Details
UnitOfMeasureId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The unit of measure of the product associated with the invoice line. Available in API version 63.0 and later. This field is a relationship field.</p> <p>Relationship Name UnitOfMeasure</p> <p>Refers To UnitOfMeasure</p>
UnitPrice	<p>Type currency</p> <p>Properties Filter, Nillable, Sort, Update</p> <p>Description The price for one unit of the item on the invoice line.</p>
UsageOverageQuantity	<p>Type double</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The quantity of the usage overage that's being invoiced. This field is available in API version 63.0 and later with Revenue Cloud Billing license.</p>
UsageProductBillSchdGrpId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The ID of the usage-based product billing schedule group associated with the invoice line. This field is available in API version 63.0 and later with Revenue Cloud Billing license. This field is a relationship field.</p> <p>Relationship Name UsageProductBillSchdGrp</p> <p>Refers To BillingScheduleGroup</p>

Field	Details
UsageProductId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The ID of the usage-based product that was charged or ordered to create the invoice line. This field is available in API version 63.0 and later with Revenue Cloud Billing license. This field is a relationship field.</p> <p>Relationship Name UsageProduct</p> <p>Refers To Product2</p>

InvoiceLineRelationship

Represents a relationship between invoice line items to support bundles where one parent invoice line has multiple child invoice lines. This object is available in API version 62.0 and later.

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

Supported Calls

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

Special Access Rules

You need the Billing Admin permission set to access this object.

Fields

Field	Details
AssociatedInvoiceLineId	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description Required. The ID of the related invoice line record. In a bundle relationship, this invoice line is the child. This field is a relationship field.</p>

Field	Details
	<p>Relationship Name AssociatedInvoiceLine</p> <p>Refers To InvoiceLine</p>
AssociatedInvoiceLinePricing	<p>Type picklist</p> <p>Properties Filter, Group, Restricted picklist, Sort</p> <p>Description Required. This field describes how the related invoice line is priced relative to the primary invoice line. Valid values are:</p> <ul style="list-style-type: none"> • IncludedInBundlePrice • NotIncludedInBundlePrice
AssociatedInvoiceLineRole	<p>Type picklist</p> <p>Properties Filter, Group, Restricted picklist, Sort</p> <p>Description Required. This field describes the role of the related invoice line in the relationship. The value is derived from the <code>AssociatedProductRoleCat</code> field of the <code>ProductRelationshipType</code> object. Valid values are:</p> <ul style="list-style-type: none"> • AddOnComponent • BundleComponent • ClassificationComponent • SetComponent
InvoiceId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The ID of the related invoice record. This field is a relationship field.</p> <p>Relationship Name Invoice</p>

Field	Details
	<p>Refers To Invoice</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed an invoice line relationship record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed an invoice line relationship record. If this value is null, it's possible that the user only accessed the invoice line relationship record or a related list view (<code>LastReferencedDate</code>), but not viewed the invoice line relationship record itself.</p>
MainInvoiceLineId	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description Required. The ID of the primary invoice line record. In a bundle relationship, this invoice line is the parent. This field is a relationship field.</p> <p>Relationship Name MainInvoiceLine</p> <p>Relationship Type Master-detail</p> <p>Refers To InvoiceLine (the master object)</p>
MainInvoiceLineRole	<p>Type picklist</p> <p>Properties Filter, Group, Restricted picklist, Sort</p>

Field	Details
	<p>Description</p> <p>Required. This field describes the role of the primary invoice line in the relationship. The value is derived from the <code>MainProductRoleCat</code> field of the <code>ProductRelationshipType</code> object.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • <code>AddOn</code> • <code>Bundle</code> • <code>Set</code>
Name	<p>Type</p> <p>string</p> <p>Properties</p> <p>Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description</p> <p>Required. An auto-generated number identifying the invoice line relationship.</p>
ProductRelationshipTypeId	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Filter, Group, Nillable, Sort</p> <p>Description</p> <p>The ID of the product relationship type record between the main and associated invoice lines.</p> <p>This field is a relationship field.</p> <p>Relationship Name</p> <p>ProductRelationshipType</p> <p>Refers To</p> <p>ProductRelationshipType</p>

Associated Objects

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

[InvoiceLineRelationshipFeed](#) on page 2171

Feed tracking is available for the object.

[InvoiceLineRelationshipHistory](#) on page 2178

History is available for tracked fields of the object.

InvoiceLineTax

Represents tax information of an invoice line of type `Tax`. This object is available in API version 62.0 and later.

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

Supported Calls

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

Special Access Rules

You need the Tax Admin permission set to access this object.

Fields

Field	Details
BillingAddressId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort, Update</p> <p>Description The billing address of the parent invoice line. Edit access is enabled for this field. You must not modify this field when the invoice line is related to a posted invoice. This field is a relationship field.</p> <p>Relationship Name BillingAddress</p> <p>Refers To InvoiceAddressGroup</p>
ConvertedNegAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort, Update</p> <p>Description The amount from the parent invoice line that's converted to credit. Edit access is enabled for this field. You must not modify this field when the invoice line is related to a posted invoice.</p>
CorpCrcyCnvTaxAmount	<p>Type double</p> <p>Properties Filter, Group, Nillable, Sort</p>

Field	Details
	<p>Description The total tax amount of the invoice line tax in corporate currency. Available in API version 63.0 and later.</p>
CorporateCurrencyCvsnDate	<p>Type date</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The date on which the invoice line tax amounts are converted to the corporate currency. Available in API version 63.0 and later.</p>
CorporateCurrencyCvsnRate	<p>Type double</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The exchange rate that's used to convert the invoice line tax amounts to the corporate currency. Available in API version 63.0 and later.</p>
CorporateCurrencyIsoCode	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The currency ISO code of the corporate currency. Available in API version 63.0 and later.</p>
Description	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort, Update</p> <p>Description Additional details about the invoice line tax.</p>
EndDate	<p>Type date</p> <p>Properties Filter, Group, Sort, Update</p> <p>Description Required. The end date of an invoice line tax.</p>

Field	Details
InvoiceLineId	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description Required. The ID of the parent charge or adjustment invoice line record that an invoice line tax is related to. This field is a relationship field.</p> <p>Relationship Name InvoiceLine</p> <p>Relationship Type Master-detail</p> <p>Refers To InvoiceLine (the master object)</p>
InvoiceLineTaxNumber	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Required. An auto-generated number identifying an invoice line tax.</p>
LegalEntityAccountingPeriodId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the legal entity accounting period record that's related to an invoice line tax. This field is a relationship field.</p> <p>Relationship Name LegalEntityAccountingPeriod</p> <p>Refers To LegalEntyAccountingPeriod</p>
LegalEntityId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the legal entity that's related to an invoice line tax. This field is a relationship field.</p>

Field	Details
	<p>Relationship Name LegalEntity</p> <p>Refers To LegalEntity</p>
Product2Id	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort, Update</p> <p>Description The product that was charged or ordered to create the parent invoice line. Available in API version 62.0 only. This field is a relationship field.</p> <p>Relationship Name Product2</p> <p>Refers To Product2</p>
Quantity	<p>Type double</p> <p>Properties Filter, Nillable, Sort, Update</p> <p>Description The number of units of the order product that created the parent invoice line. Available in API version 62.0 only.</p>
ShipFromAddressId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ship from address specified in the parent invoice line. Edit access is enabled for this field. You must not modify this field when the invoice line is related to a posted invoice. Available in API version 64.0 and later. This field is a relationship field.</p> <p>Relationship Name ShipFromAddress</p> <p>Refers To InvoiceAddressGroup</p>

Field	Details
ShippingAddressId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the shipping address record of the parent invoice line. Edit access is enabled for this field. You must not modify this field when the invoice line is related to a posted invoice. This field is a relationship field.</p> <p>Relationship Name ShippingAddress</p> <p>Refers To InvoiceAddressGroup</p>
StartDate	<p>Type date</p> <p>Properties Filter, Group, Sort, Update</p> <p>Description Required. The start date of an invoice line tax.</p>
TaxAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort, Update</p> <p>Description The total amount of an invoice line tax. Edit access is enabled for this field. You must not modify this field when the invoice line is related to a posted invoice. Available in API version 65.0 and later.</p>
TaxCode	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort, Update</p> <p>Description The code that's used to calculate the tax rate for the parent invoice line. Edit access is enabled for this field. You must not modify this field when the invoice line is related to a posted invoice.</p>
TaxDocumentNumber	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description</p> <p>The number of the latest record in the external tax engine in which the parent invoice line is included. Edit access is enabled for this field. You must not modify this field when the invoice line is related to a posted invoice.</p>
TaxEffectiveDate	<p>Type</p> <p>date</p> <p>Properties</p> <p>Filter, Group, Nillable, Sort, Update</p> <p>Description</p> <p>The date used to calculate the tax amount. Edit access is enabled for this field. You must not modify this field when the invoice line is related to a posted invoice.</p>
TaxExemptAmount	<p>Type</p> <p>currency</p> <p>Properties</p> <p>Filter, Nillable, Sort, Update</p> <p>Description</p> <p>The amount that's exempted from tax. Edit access is enabled for this field. You must not modify this field when the invoice line is related to a posted invoice.</p>
TaxName	<p>Type</p> <p>string</p> <p>Properties</p> <p>Filter, Group, Nillable, Sort, Update</p> <p>Description</p> <p>The user-defined name for an invoice line tax. Edit access is enabled for this field. You must not modify this field when the invoice line is related to a posted invoice.</p>
TaxProcessingStatus	<p>Type</p> <p>picklist</p> <p>Properties</p> <p>Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description</p> <p>The processing status of the invoice line tax.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • Estimated • Pending • Posted
TaxRate	<p>Type</p> <p>percent</p>

Field	Details
	<p>Properties Filter, Nillable, Sort, Update</p> <p>Description The percentage of the order product price that's used to calculate tax. Edit access is enabled for this field. You must not modify this field when the invoice line is related to a posted invoice.</p>
TaxTransactionNumber	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort, Update</p> <p>Description The number of the transaction in the external tax engine that calculated tax for the parent invoice line.</p>
TaxTreatmentId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the tax treatment record that's related to an invoice line tax. Edit access is enabled for this field. You must not modify this field when the invoice line is related to a posted invoice. This field is a relationship field.</p> <p>Relationship Name TaxTreatment</p> <p>Refers To TaxTreatment</p>
UnitPrice	<p>Type currency</p> <p>Properties Filter, Nillable, Sort, Update</p> <p>Description The price per unit of the order product that's related to an invoice line tax. Available in API version 62.0 only.</p>

Associated Objects

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

InvoiceLineTaxFeed on page 2171

Feed tracking is available for the object.

InvoiceLineTaxHistory on page 2178

History is available for tracked fields of the object.

LegalEntity

Represents the way an organization is structured. An organization can be a single legal entity or it can comprise more than one legal entity. 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

You need the Accounts Receivables Admin permission set to access this object.

Fields

Field	Details
CompanyName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The name of the company that this legal entity represents.</p>
Description	<p>Type textarea</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Additional details about the legal entity.</p>
EmailTemplateId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A template that's used to send emails for the legal entity. This field is available in API version 65.0 and later.</p>

Field	Details
	<p>This field is a relationship field.</p> <p>Relationship Name EmailTemplate</p> <p>Refers To EmailTemplate</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed a legal entity indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed a legal entity. If this value is null, it's possible that the user only accessed the legal entity or a related list view (<code>LastReferencedDate</code>), but not viewed the legal entity itself.</p>
LegalEntityAddress	<p>Type address</p> <p>Properties Filter, Nillable</p> <p>Description The address of the company that this legal entity represents. See Address Compound Fields for details on compound address fields.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Required. The name of the legal entity.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p>

Field	Details
	<p>Description Required. The ID of the record owner. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
ShouldAttachInvoiceDocToEmail	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether to attach the invoice PDF document to the email that's sent for the legal entity (<code>true</code>) or not (<code>false</code>). This field is available in API version 65.0 and later. The default value is <code>false</code>.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The status of the legal entity. Valid values are:</p> <ul style="list-style-type: none"> • Active • Inactive

LegalEntryAccountingPeriod

Represents a junction between a legal entity and an accounting period. 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

You need the Accounts Receivables Admin permission set to access this object.

Fields

Field	Details
AccountingPeriodId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the accounting period record that's related to a legal entity accounting period. This field is a relationship field.</p> <p>Relationship Name AccountingPeriod</p> <p>Refers To AccountingPeriod</p>
ClosureStage	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the closure stage of the legal entity accounting period. This field is available in API version 65.0 and later. Valid values are:</p> <ul style="list-style-type: none"> • CloseLegalEntityAccountingPeriod • Completed • Open • CreateGeneralLedgerAccountingPeriodSummaries • CreateUnrealizedGainOrLossTransactionJournals
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed a legal entity accounting period record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	<p>Description</p> <p>The timestamp when the current user last viewed a legal entity accounting period record. If this value is null, it's possible that the user only accessed the legal entity accounting period record or a related list view (<code>LastReferencedDate</code>), but not viewed the legal entity accounting period record itself.</p>
LegalEntityId	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Create, Filter, Group, Sort, Update</p> <p>Description</p> <p>Required. The ID of the legal entity record that's related to a legal entity accounting period. This field is a relationship field.</p> <p>Relationship Name</p> <p>LegalEntity</p> <p>Refers To</p> <p>LegalEntity</p>
Name	<p>Type</p> <p>string</p> <p>Properties</p> <p>Filter, Group, idLookup, Sort</p> <p>Description</p> <p>Required. The auto-generated name of a legal entity accounting period. The name is a combination of the names of the legal entity and the accounting period.</p>
OwnerId	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description</p> <p>Required. The ID of the user who owns a legal entity accounting period record. This field is a polymorphic relationship field.</p> <p>Relationship Name</p> <p>Owner</p> <p>Refers To</p> <p>Group, User</p>
Status	<p>Type</p> <p>picklist</p>

Field	Details
	<p>Properties Create, Filter, Group, Restricted picklist, Sort</p> <p>Description Required. The status of a legal entity accounting period record.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • Closed • Error • Open • PendingClosure • PendingReopen • Reopened
TotalAssetsAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The total assets for a legal entity accounting period is a roll up summary of the closing balances of the general ledger accounting period summary records that are related to an asset type general ledger account. This field is available in API version 65.0 and later.</p>
TotalEquitiesAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The total equities for a legal entity accounting period is a roll up summary of the closing balances of the general ledger accounting period summary records that are related to an equity type general ledger account. This field is available in API version 65.0 and later.</p>
TotalExpensesAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The total expenses for a legal entity accounting period is a roll up summary of the closing balances of the general ledger accounting period summary records that are related to an expense type general ledger account. This field is available in API version 65.0 and later.</p>
TotalLiabilitiesAmount	<p>Type currency</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The total liabilities for a legal entity accounting period is a roll up summary of the closing balances of the general ledger accounting period summary records that are related to a liability type general ledger account. This field is available in API version 65.0 and later.</p>
TotalRevenueAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The total revenue for a legal entity accounting period is a roll up summary of the closing balances of the general ledger accounting period summary records that are related to a revenue type general ledger account. This field is available in API version 65.0 and later.</p>

Associated Objects

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

[LegalEntyAccountingPeriodShare](#) on page 2182

Sharing is available for the object.

PaymentBatchRun

Represents a batch processing job that processes payments in Billing. During a payment batch run, all the payment schedules that meet the specified criteria are processed and the corresponding Payment records are created. These payments are then applied to invoices or invoice lines. This object is available in API version 64.0 and later.

Supported Calls

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

Special Access Rules

You need the Revenue Cloud Billing license, and the Payment Admin permission set or the Payment Operations User permission set to access this object.

Fields

Field	Details
BillingBatchSchedulerId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Required. The ID of the billing batch scheduler that's used to schedule the payment batch run. This field is a relationship field.</p> <p>Relationship Name BillingBatchScheduler</p> <p>Refers To BillingBatchScheduler</p>
Comments	<p>Type textarea</p> <p>Properties Filter, Nillable, Sort, Update</p> <p>Description Additional details about the payment batch run.</p>
CompletionTime	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date and time when the payment batch run completed processing payments.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	<p>Description</p> <p>The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
OwnerId	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Filter, Group, Sort, Update</p> <p>Description</p> <p>Required. The ID of the owner of the Payment Batch Run record.</p> <p>This field is a polymorphic relationship field.</p> <p>Relationship Name</p> <p>Owner</p> <p>Refers To</p> <p>Group, User</p>
PaymentBatchRunNumber	<p>Type</p> <p>string</p> <p>Properties</p> <p>Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description</p> <p>Required. The auto-generated reference number for the payment batch run.</p>
StartTime	<p>Type</p> <p>dateTime</p> <p>Properties</p> <p>Filter, Nillable, Sort</p> <p>Description</p> <p>The date and time when the payment batch run started processing payments.</p>
Status	<p>Type</p> <p>picklist</p> <p>Properties</p> <p>Defaulted on create, Filter, Group, Restricted picklist, Sort</p> <p>Description</p> <p>Required. The status of the payment batch run.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • Completed • Failed • New • Started

Field	Details
	<ul style="list-style-type: none"> • Stopped <p>The default value is New.</p>
TotalFailedScheduleItems	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The total number of payment schedules that weren't processed by the payment batch run. When a payment schedule isn't processed, the system doesn't generate a Payment record for it. For details about errors, check the Revenue Transaction Error Log records for the payment batch run.</p>
TotalFilteredScheduleItems	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The total number of payment schedule items that meet the payment run scheduler's matching criteria. The matching criteria identifies the payment schedule items that are included for processing by the payment batch run.</p>
TotalProcessedScheduleItems	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The total number of payment schedule items that were processed by the payment batch run.</p>
TotalScheduleItemsApplied	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The total number of payment schedule items that were processed and had corresponding payments also applied to invoices or invoice lines.</p>
TotalScheduleItemsApplyFailed	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p>

Field	Details
	<p>Description</p> <p>The total number of payment schedule items that were processed but had corresponding payments that weren't applied to invoices or invoice lines.</p>

Associated Objects

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

[PaymentBatchRunShare](#) on page 2182

Sharing is available for the object.

PaymentLineInvoiceLine

Represents information about a payment line that's applied to or unapplied from an invoice line. This object is available in API version 64.0 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()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `update()`, `upsert()`

Special Access Rules

You need the Revenue Cloud Billing license, and the Payment Admin permission set or the Payment Operations User permission set to access this object.

Fields

Field	Details
AccountId	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Sort</p> <p>Description</p> <p>The account of the customer who made a payment that's related to the payment line invoice line.</p> <p>This field is a relationship field.</p> <p>Relationship Name</p> <p>Account</p>

Field	Details
	<p>Refers To Account</p>
Amount	<p>Type currency</p> <p>Properties Create, Filter, Sort</p> <p>Description Required. The amount that's been applied or unapplied by a payment line.</p>
AppliedDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort</p> <p>Description The date and time when a payment line was applied to an invoice line.</p>
AppliedImpactAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description If the payment line invoice line's <code>Type</code> value is <code>Applied</code>, the applied impact amount is the same as the <code>ImpactAmount</code> value. The applied impact amount is 0 when the <code>Type</code> value is <code>Unapplied</code>. This field is a calculated field.</p>
Description	<p>Type textarea</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Additional details about the payment line invoice line.</p>
EffectiveDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort</p> <p>Description The date and time when a payment line's application to or unapplication from an invoice line becomes effective.</p>

Field	Details
ImpactAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description If the payment line invoice line's <code>Type</code> value is <code>Applied</code>, the impact amount is the negative equivalent of the payment line invoice line's <code>Amount</code> value. Otherwise, it's equal to the payment line invoice line's <code>Amount</code> value.</p> <p>This field is a calculated field.</p>
InvoiceLineBalance	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The balance of the invoice line after a payment line was applied to it or unapplied from it.</p>
InvoiceLineId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Required. The invoice line to which a payment line has been applied or unapplied.</p> <p>This field is a relationship field.</p> <p>Relationship Name InvoiceLine</p> <p>Relationship Type Master-detail</p> <p>Refers To InvoiceLine (the master object)</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
LegalEntityAccountingPeriodId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The legal entity accounting period related to the payment line invoice line. This field is a relationship field.</p> <p>Relationship Name LegalEntityAccountingPeriod</p> <p>Refers To LegalEntyAccountingPeriod</p>
LegalEntityId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The legal entity related to the payment line invoice line. This field is a relationship field.</p> <p>Relationship Name LegalEntity</p> <p>Refers To LegalEntity</p>
PaymentBalance	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The balance of the Payment record after it was applied to or unapplied from an invoice line.</p>
PaymentId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p>

Field	Details
	<p>Description Required. The parent Payment record that's related to the payment line invoice line. This field is a relationship field.</p> <p>Relationship Name Payment</p> <p>Refers To Payment</p>
PaymentLineInvoiceLineNumber	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Required. An auto-generated number identifying the payment line invoice line.</p>
RelatedPaymentLineInvLineId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort</p> <p>Description The related payment line invoice line with the <code>Type</code> value as <code>Applied</code> when the payment line invoice line's <code>Type</code> value is <code>Unapplied</code>. This field is a relationship field.</p> <p>Relationship Name RelatedPaymentLineInvLine</p> <p>Refers To PaymentLineInvoiceLine</p>
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort</p> <p>Description Required. Specifies whether a payment line has been applied to or unapplied from an invoice line. Valid values are:</p> <ul style="list-style-type: none"> • Applied • Unapplied
UnappliedDateTime	<p>Type dateTime</p>

Field	Details
	<p>Properties Create, Filter, Nillable, Sort</p> <p>Description The date and time when a payment line was unapplied from an invoice line.</p>
UnappliedStatus	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort</p> <p>Description Required. Specifies whether a payment line has been unapplied from an invoice line. Valid values are:</p> <ul style="list-style-type: none"> • NA—Not Applicable • No • Yes

PaymentSchedule

Represents information about a set of payments that a customer wants to collect at different times for a certain record. A schedule contains one or more payment schedule items, where each item represents one payment to be processed. Each of a schedule's items can have different payment configuration fields, such as payment methods, payment dates, and payment accounts. When a payment scheduler launches a payment run, the run evaluates active payment schedule items, and picks them up for payment processing if they match the scheduler's payment criteria. This object is available in API version 64.0 and later.

Supported Calls

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

Special Access Rules

You need the Revenue Cloud Billing license, and the Payment Admin permission set or the Payment Operations User permission set to access this object.

Fields

Field	Details
AvailableRequestedAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	<p>Description</p> <p>The payment schedule's remaining amount available for the creation of payment schedule items. This value is calculated by deducting the <code>TotalLineRequestedAmount</code> value from the <code>TotalRequestedAmount</code> value.</p> <p>This field is a calculated field.</p>
Comments	<p>Type</p> <p>textarea</p> <p>Properties</p> <p>Create, Filter, Nillable, Sort, Update</p> <p>Description</p> <p>Additional details about the payment schedule.</p>
DefaultPaymentAccountId	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p>Description</p> <p>When a payment run creates payments from a payment schedule item, it sets the payment's account to the item's <code>PaymentAccountId</code> value. When the payment schedule item is created, the item's <code>PaymentAccountId</code> inherits the schedule's <code>DefaultPaymentAccountId</code>. However, you can override the <code>PaymentAccountId</code> with a different account as needed. If you do, future payments made from the item use the new account.</p> <p>This field is a relationship field.</p> <p>Relationship Name</p> <p>DefaultPaymentAccount</p> <p>Refers To</p> <p>Account</p>
DefaultPaymentMethodId	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p>Description</p> <p>When a payment run creates payments from a payment schedule item, it sets the payment's payment method to the item's <code>PaymentMethodId</code>. When the payment schedule item is created, the item's <code>PaymentMethodId</code> inherits the schedule's <code>DefaultPaymentMethodId</code>. However, you can override the <code>PaymentMethodId</code> with a different method as needed. If you do, future payments made from the item will use the new method.</p> <p>This field is a polymorphic relationship field.</p>

Field	Details
	<p>Relationship Name DefaultPaymentMethod</p> <p>Refers To CardPaymentMethod, SavedPaymentMethod</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate is not null, the user accessed this record or list view indirectly.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Required. The ID of the owner of the Payment Schedule record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
PaymentScheduleNumber	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Required. The auto-generated reference number for the payment schedule.</p>

Field	Details
PaymentSource	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description</p>
ReferenceEntityId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The object record that receives payments as a result of the related payment schedule items that are processed. This field is a polymorphic relationship field.</p> <p>Relationship Name ReferenceEntity</p> <p>Refers To Contract, Invoice, Order, Quote</p>
RemainingAmountToBeProcessed	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The total pending amount of payment schedule items that haven't yet been processed for payment. This value is calculated by deducting the <code>TotalProcessedAmount</code> value from the <code>TotalLineRequestedAmount</code> value. This field is a calculated field.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Required. The status of the payment schedule. Valid values are:</p> <ul style="list-style-type: none"> • <code>Canceled</code>—Payment runs can't evaluate payment schedules or use them to create payments. • <code>Completed</code>—All of the payment schedule's payment schedule items have been processed for payments.

Field	Details
	<ul style="list-style-type: none"> Draft—The payment schedule can be edited and configured. Payment runs don't evaluate draft payment schedules. Open—The payment schedule is available for payment run evaluation.
TotalAppliedAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The amount of all the related payment schedule items that have been applied to payments. This field is a calculated field.</p>
TotalCanceledAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The sum of all RequestedAmount values of all the related payment schedule items with a status of Canceled. This field is a calculated field.</p>
TotalPaymentScheduleItemAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The total amount allocated from the payment schedule to its payment schedule items. This value is calculated by deducting the sum of each payment schedule item's CanceledAmount from the sum of each payment schedule item's RequestedAmount. This field is a calculated field.</p>
TotalPaymentsReceived	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The sum of all the total payment received for all the related payment schedule items. This field is a calculated field.</p>
TotalProcessedAmount	<p>Type currency</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The sum of <code>ProcessedAmount</code> values of all the related payment schedule items with a status of <code>Processed</code>. This field is a calculated field.</p>
<code>TotalRequestedAmount</code>	<p>Type currency</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description Required. The total amount available for a payment schedule to distribute to its payment schedule items. The sum of payment schedule items can't be greater than the <code>TotalLineRequestedAmount</code> value of the parent payment schedule.</p>
<code>UsageType</code>	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The feature using the payment schedule. Valid value is:</p> <ul style="list-style-type: none"> • <code>CollectionPlan</code>

PaymentSchedulePolicy

Represents information about the configuration for the payment schedule. This object is available in API version 64.0 and later.

Supported Calls

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

Special Access Rules

You need the Revenue Cloud Billing license, and the Payment Admin permission set or the Payment Operations User permission set to access this object.

Fields

Field	Details
DefaultTreatmentId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The default payment schedule treatment. This field is a relationship field.</p> <p>Relationship Name DefaultTreatment</p> <p>Refers To PaymentScheduleTreatment</p>
Description	<p>Type textarea</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The user-entered description for the payment schedule policy.</p>
IsOrgDefault	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description If the payment schedule policy is the default policy for the org, this value is set to <code>true</code>. If not, this value is set to <code>false</code>. An org can have only one default payment policy. The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description The user-entered name of the payment schedule policy.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Required. The ID of the owner of the PaymentSchedulePolicy record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description The status of the payment schedule policy. Valid values are:</p> <ul style="list-style-type: none"> • Active • Canceled • Draft • Inactive
TreatmentSelection	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p>

Field	Details
	<p>Description</p> <p>Specifies the payment schedule treatment.</p> <p>Valid value is:</p> <ul style="list-style-type: none"> <code>Default</code>—Uses the payment schedule treatment indicated by the <code>DefaultTreatmentId</code> field.

PaymentScheduleTreatment

Represents information about the processing of payment schedules including the payment method and the payment amount for the payment schedule. This object is available in API version 64.0 and later.

Supported Calls

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

Special Access Rules

You need the Revenue Cloud Billing license, and the Payment Admin permission set or the Payment Operations User permission set to access this object.

Fields

Field	Details
Description	<p>Type</p> <p>textarea</p> <p>Properties</p> <p>Create, Filter, Nillable, Sort, Update</p> <p>Description</p> <p>The user-entered description of the payment schedule treatment.</p>
LastReferencedDate	<p>Type</p> <p>dateTime</p> <p>Properties</p> <p>Filter, Nillable, Sort</p> <p>Description</p> <p>The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type</p> <p>dateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Required. The user-entered name of the payment schedule treatment.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Required. The ID of the owner of the PaymentScheduleTreatment record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
PaymentSchedulePolicyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the related payment schedule policy. This field is a relationship field.</p> <p>Relationship Name PaymentSchedulePolicy</p> <p>Refers To PaymentSchedulePolicy</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p>

Field	Details
	<p>Description</p> <p>Required. The status of the payment schedule treatment.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • Active • Canceled • Draft • Inactive
TriggerSource	<p>Type</p> <p>picklist</p> <p>Properties</p> <p>Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description</p> <p>Required. The action that caused the payment schedule treatment to be created.</p> <p>Valid value is:</p> <ul style="list-style-type: none"> • InvoicePosted

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.

[PaymentScheduleTreatmentShare](#) on page 2182

Sharing is available for the object.

PaymentScheduleTreatmentDtl

Represents information about the processing of payment schedules after the corresponding invoices are posted. This object is available in API version 64.0 and later.

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

Supported Calls

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

Special Access Rules

You need the Revenue Cloud Billing license, and the Payment Admin permission set or the Payment Operations User permission set to access this object.

Fields

Field	Details
DateOffset	<p>Type int</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. The date offset is subtracted from the <code>ProcessingDateReference</code> value to determine the processing date. It must be a number equal to or less than 0. For example, if the invoice due date is 10/17/2025 and the date offset is -7, the payment schedule item is processed by jobs that run on or before 10/10/2025.</p>
Description	<p>Type textarea</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The user-entered description for the payment schedule treatment detail.</p>
InstallmentPaymentType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Required. Indicates how the payment amount is divided into multiple payments. Valid value is:</p> <ul style="list-style-type: none"> • Percentage
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	<p>Description</p> <p>The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.</p>
PaymentMethodSelectionType	<p>Type</p> <p>picklist</p> <p>Properties</p> <p>Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description</p> <p>Required. Indicates how the payment method is specified.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • <code>Manual</code>—The user enters the payment method. • <code>MostRecentAutopay</code>—The payment method is the most recently used automatic payment method. • <code>DefaultSavedPaymentMethod</code>—The default payment method used for processing payments. Available in API version 65.0 and later.
PaymentRunMatchingValue	<p>Type</p> <p>picklist</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p>Description</p> <p>The value for the condition specified for the payment run criteria. When a payment batch run starts, all the payment schedule items that meet the specified criteria are processed.</p>
PaymentScheduleTreatmentDetailNumber	<p>Type</p> <p>string</p> <p>Properties</p> <p>Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description</p> <p>Required. The system-generated unique identifier for the payment schedule treatment detail.</p>
PaymentScheduleTreatmentId	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Create, Filter, Group, Sort</p> <p>Description</p> <p>Required. The ID of the related payment schedule treatment.</p> <p>This field is a relationship field.</p> <p>Relationship Name</p> <p>PaymentScheduleTreatment</p>

Field	Details
	<p>Relationship Type Master-detail</p> <p>Refers To PaymentScheduleTreatment (the master object)</p>
Percentage	<p>Type percent</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The percentage of the source amount that's used to create the payment schedule.</p>
ProcessingDateReference	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Required. The source of the reference date. Valid value is:</p> <ul style="list-style-type: none"> • InvoiceDueDate
PymtSchdDistributionMethodId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. The distribution method that contains the information on how to create the payment schedule items. This field is a relationship field.</p> <p>Relationship Name PymtSchdDistributionMethod</p> <p>Refers To PymtSchdDistributionMethod</p>

PymtSchdDistributionMethod

Represents information about the partial payments that the total payment is divided into. This object is available in API version 64.0 and later.

Supported Calls

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

Special Access Rules

You need the Revenue Cloud Billing license, and the Payment Admin permission set or the Payment Operations User permission set to access this object.

Fields

Field	Details
Description	<p>Type textarea</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The user-entered details of the payment schedule distribution method.</p>
DistributionCount	<p>Type int</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. The number of payment schedule items for the payment schedule. The payment schedule items are used to distribute the payment schedule's total payment into partial payments.</p>
DistributionMethodType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Required. The time interval of the payment distribution method. Valid value is:</p> <ul style="list-style-type: none"> • <code>FullDistribution</code>—The full amount on the payment schedule is distributed to a single payment schedule item.
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	<p>Description</p> <p>The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type</p> <p>dateTime</p> <p>Properties</p> <p>Filter, Nillable, Sort</p> <p>Description</p> <p>The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate is not null, the user accessed this record or list view indirectly.</p>
Name	<p>Type</p> <p>string</p> <p>Properties</p> <p>Create, Filter, Group, idLookup, Sort, Update</p> <p>Description</p> <p>Required. The user-entered name for the payment schedule distribution method.</p>
OwnerId	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description</p> <p>Required. The ID of the owner of the PaymentScheduleDistributionMethod record.</p> <p>This field is a polymorphic relationship field.</p> <p>Relationship Name</p> <p>Owner</p> <p>Refers To</p> <p>Group, User</p>

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.

[PymtSchdDistributionMethodShare](#)

Sharing is available for the object.

PaymentScheduleItem

Represents information about a payment to be processed. Each schedule item can have different payment configuration fields, such as payment methods, payment dates, and payment accounts. When a payment scheduler launches a payment run, the run evaluates active payment schedule items, and picks them up for payment processing if they match the scheduler's payment criteria. This object is available in API version 64.0 and later.

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

Supported Calls

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

Special Access Rules

You need the Revenue Cloud Billing license, and the Payment Admin permission set or the Payment Operations User permission set to access this object.

Fields

Field	Details
AppliedAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The amount of a credit memo or payment that's applied to the parent reference entity and is excluded for payment collection.</p>
Comments	<p>Type textarea</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Additional details about the payment schedule item.</p>
LastPaymentGatewayLogId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The most recent payment gateway log created after a payment gateway request is sent to process a payment based on the payment schedule item.</p>

Field	Details
	<p>This field is a relationship field.</p> <p>Relationship Name LastPaymentGatewayLog</p> <p>Refers To PaymentGatewayLog</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate is not null, the user accessed this record or list view indirectly.</p>
PaymentAccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The account assigned to payments made from the payment schedule item. When a payment schedule item is created, its PaymentAccountId inherits the payment schedule's DefaultPaymentAccountId. However, you can provide a new PaymentAccountId at any time. If you change the PaymentAccountId, only payments made after the change use the new account.</p> <p>This field is a relationship field.</p> <p>Relationship Name PaymentAccount</p> <p>Refers To Account</p>
PaymentBatchRunId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p>

Field	Details
	<p>Description The payment batch run that evaluated the payment schedule item for payment processing. This field is a relationship field.</p> <p>Relationship Name PaymentBatchRun</p> <p>Refers To PaymentBatchRun</p>
PaymentGatewayRespStatus	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description The status of the payment gateway response when the payment schedule item is processed. Valid values are:</p> <ul style="list-style-type: none"> • Decline • Indeterminate • PermanentFail • RequiresReview • Success • SystemError • ValidationError <p>See SalesforceResultCode Enum for more information about the values.</p>
PaymentId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The payment that a payment run created for the payment schedule item after picking up the parent payment schedule. This field is unique within your organization. This field is a relationship field.</p> <p>Relationship Name Payment</p> <p>Refers To Payment</p>
PaymentMethodId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The payment method assigned to payments created from the payment schedule item. When a payment schedule item is created, its <code>PaymentMethodId</code> inherits the payment schedule's <code>DefaultPaymentMethodId</code>. However, you can provide a new <code>PaymentMethodId</code> at any time. If you change the <code>PaymentMethodId</code>, only payments made after the change use the new account.</p> <p>This field is a polymorphic relationship field.</p> <p>Relationship Name PaymentMethod</p> <p>Refers To CardPaymentMethod, SavedPaymentMethod</p>
PaymentProcessingMessage	<p>Type string</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Information about whether the payment creation process has completed.</p>
PaymentRunMatchingValue	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The value used to match a payment schedule item to a payment run based on the payment run's matching criteria.</p>
PaymentScheduleId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Required. The parent payment schedule for the payment schedule item.</p> <p>This field is a relationship field.</p> <p>Relationship Name PaymentSchedule</p> <p>Relationship Type Master-detail</p>

Field	Details
	<p>Refers To PaymentSchedule (the master object)</p>
PaymentScheduleItemNumber	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Required. The auto-generated reference number for the payment schedule item.</p>
PaymentSource	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description The process that created a payment based on the payment schedule item. Valid values are:</p> <ul style="list-style-type: none"> • External Payment • Payment Run
PaymentsReceived	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The amount that's been received for the payment created for the payment schedule item.</p>
ProcessedAmount	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The amount of the payment schedule item that has been processed for payment and converted to a payment record.</p>
RequestedAmount	<p>Type currency</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description Required. The initial amount of the payment schedule item upon creation.</p>

Field	Details
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Required. The status of the payment schedule item. Valid values are:</p> <ul style="list-style-type: none"> • Applied—The payment schedule item has been successfully applied. • Apply Failed—The payment run encountered an error when attempting to process the payment schedule item for payment. For more information, review the payment run's revenue transaction error log. • Canceled—The payment schedule item can't be picked up by payment runs for processing. When a user or process changes the item's status to <code>Canceled</code>, the item's <code>CanceledAmount</code> becomes <code>RequestedAmount - ProcessedAmount</code>. • Draft—Payment schedule items are created with this status. • Failed—The payment run has failed to process the payment schedule item for payment. • Processed—The payment run has processed the payment schedule item for payment. • Processing—The payment run is processing the payment schedule item for payment. • Ready for Processing—The payment schedule item is ready to be processed by a payment run.
TargetPaymentProcessingDate	<p>Type date</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. The date when the payment run makes a payment request to the payment gateway for the payment schedule item.</p>
UsageType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The feature using the payment schedule item. Valid value is:</p> <ul style="list-style-type: none"> • <code>CollectionPlan</code>

PaymentTerm

Represents an agreement between a buyer and a seller about when payment is due for an invoice. 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

You need the Billing Admin permission set to access this object.

Fields

Field	Details
Description	<p>Type textarea</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Additional details about the payment term.</p>
IsDefault	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Required. Indicates whether the payment term is the default term for your Salesforce org (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> field is not null, the user accessed this record or list view indirectly.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Required. The name of the payment term. This name appears on the invoice.</p>
Status	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Required. Specifies whether the payment term is available for use on invoices. Possible values are:</p> <ul style="list-style-type: none"> • Active • Draft • Inactive <p>The default value is <code>Draft</code>.</p>

PaymentTermItem

Represents configuration of a payment term. This object is available in API version 62.0 and later.



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

Supported Calls

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

Special Access Rules

You need the Billing Admin permission set to access this object.

Fields

Field	Details
Description	<p>Type textarea</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Additional details about the payment term item.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate field is not null, the user accessed this record or list view indirectly.</p>
Name	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Required. The autogenerated name of the payment term item.</p>
PaymentTermId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Required. The ID of the parent payment term record. This field is a relationship field.</p> <p>Relationship Name PaymentTerm</p>

Field	Details
	<p>Relationship Type Master-detail</p> <p>Refers To PaymentTerm (the master object)</p>
PaymentTimeframe	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Required. The period by when the payment is expected.</p> <p>Valid value is:</p> <ul style="list-style-type: none"> • Standard— The payment must be made by the date specified in the payment term. If payment isn't received by the due date, the payment becomes overdue.
Period	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The number of units in the payment period. Used with the <code>PeriodUnit</code> field.</p> <p>For example, to define a payment term of Net 30, enter 30 as the value of the <code>Period</code> field and select <code>Days</code> as the value of the <code>PeriodUnit</code> field.</p>
PeriodUnit	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The unit of time for the payment period.</p> <p>For example, to define a payment term of Net 30, enter 30 as the value of the <code>Period</code> field and select <code>Days</code> as the value of the <code>PeriodUnit</code> field.</p> <p>The valid value is:</p> <ul style="list-style-type: none"> • <code>Days</code>
Type	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Required. Specifies how the payment term and invoice due date are derived.</p>

Field	Details
	<p>Valid values are:</p> <ul style="list-style-type: none"> • <code>EOM-Plus-X</code>—Calculates the invoice due date by adding the <code>Period</code> field value to the last day of the month in which the invoice is posted. Available in API version 63.0 and later. • <code>Period-Based</code>—Calculates the invoice due date by adding the <code>Period</code> field value to the invoice date.

RevenueTransactionErrorLog

Represents the details of errors that occurred during the processing of a request. The error record persists until a new error with the same category, primary record, and, if necessary, related record occurs. This object is available in API version 62.0 and later.

Supported Calls

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

Special Access Rules

You need the Billing Operations User permission set to access this object.

Fields

Field	Details
<code>AsyncOperationTrackerId</code>	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The ID of the async operation tracker record created by the request. Async operation tracker records contain information about the status of the asynchronous process initiated by the request. This field is a relationship field.</p> <p>Relationship Name AsyncOperationTracker</p> <p>Refers To AsyncOperationTracker</p>
<code>Category</code>	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p>

Field	Details
	<p>Description Specifies the context of the source of error.</p>
ErrorCode	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The error code shown during the request processing, such as INVALID_INPUT.</p>
ErrorLogNumber	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Required. An auto-generated unique ID that identifies the error.</p>
ErrorMessage	<p>Type textarea</p> <p>Properties Create</p> <p>Description This field contains information about the error and how to resolve it.</p>
OwnerId	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description Required. The ID of the user who made the request that resulted in the creation of the error log. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
PrimaryRecord2Id	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p>

Field	Details
	<p>Description The ID of the record that's associated with this error. This field is a polymorphic relationship field.</p> <p>Relationship Name PrimaryRecord2</p> <p>Refers To LegalEntyAccountingPeriod</p>
PrimaryRecordId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The ID of the record that's associated with this error. For example, if the error occurred while creating an invoice from an order, the primary ID is the ID of the order. This field is a polymorphic relationship field.</p> <p>Relationship Name PrimaryRecord</p> <p>Refers To Asset, AsyncOperationTracker, BillingBatchScheduler, BillingSchedule, CreditMemo, InvBatchDraftToPostedRun, Invoice, InvoiceBatchRun, InvoiceBatchRunRecovery, Order, OrderItem, RevenueAsyncOperation, RuleLibraryVersion</p>
PrimaryTextRecord	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort</p> <p>Description The identifier of the primary record associated with the error log. Available in API version 63.0 and later.</p>
RelatedRecord2Id	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The ID of a record that can provide additional context about the error. For example, if <code>PrimaryRecordId</code> is the ID of an order, this field could be the ID of an invoice line. This field is a polymorphic relationship field.</p> <p>Relationship Name RelatedRecord2</p>

Field	Details
	<p>Refers To CreditMemoLine, CreditMemoLineInvoiceLine, CreditMemoLineTax, InvoiceLine, InvoiceLineTax</p>
RelatedRecordId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The ID of a record that can provide additional context about the error. For example, if <code>PrimaryRecordId</code> is the ID of an order, this field could be the ID of an order item. This field is a polymorphic relationship field.</p> <p>Relationship Name RelatedRecord</p> <p>Refers To Asset, BillingBatchScheduler, BillingSchedule, BillingScheduleGroup, CreditMemo, CreditMemoLine, InvBatchDraftToPostedRun, Invoice, InvoiceBatchRun, InvoiceLine, OrderItem</p>
RequestIdentifier	<p>Type string</p> <p>Properties Filter, Group, idLookup, Nillable, Sort</p> <p>Description A unique ID returned by the request. Use this ID to identify the revenue transaction error log records for a specific request.</p>

SeqPolicySelectionCondition

Represents the condition used to determine which sequence policy is applied to a record. This object is available in API version 65.0 and later.



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

Supported Calls

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

Special Access Rules

You need the Billing Admin permission set to access this object.

Fields

Field	Details
ConditionNumber	<p>Type int</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. A unique number that's assigned to a condition in a sequence policy.</p>
FilterField	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. The field used in the filter condition.</p>
FilterFieldType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The data type of the filter field. Valid values are:</p> <ul style="list-style-type: none"> • Boolean • Currency • Date • DateTime • MultiPicklist • Number • Percent • Picklist • Reference • Text
FilterValue	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. The value in the filter condition.</p>

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed a sequence policy selection condition record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed a sequence policy selection condition record. If this value is null, it's possible that the user only accessed the sequence policy selection condition record or a related list view (<code>LastReferencedDate</code>), but not viewed the sequence policy selection condition record itself.</p>
Operator	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Required. The relational operator used to compare the filter field with the filter value. Valid values are:</p> <ul style="list-style-type: none"> • Equals • Not Equals
SequencePolicyId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description Required. The parent sequence policy associated with the sequence policy selection condition. Deleting a sequencing policy automatically removes all its associated criteria. This field is a relationship field.</p> <p>Relationship Name SequencePolicy</p> <p>Relationship Type Master-detail</p>

Field	Details
	<p>Refers To SequencePolicy (the master object)</p>
SequencePolicySelectionConditionName	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Required. The name of the sequence policy selection condition.</p>

SequenceGapReconciliation

Represents a missing sequence value identified during reconciliation, which can be used later to ensure there are no gaps in the sequence policy numbers. This object is available in API version 65.0 and later.

Supported Calls

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

Special Access Rules

You need the Billing Admin permission set to access this object.

Fields

Field	Details
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed sequence gap reconciliation record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed a sequence gap reconciliation record. If this value is null, it's possible that the user only accessed the sequence gap reconciliation</p>

Field	Details
	record or a related list view (<code>LastReferencedDate</code>), but not viewed the sequence gap reconciliation record itself.
<code>OwnerId</code>	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description Required. The ID of the user who owns a sequence gap reconciliation record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
<code>SequenceGapReconciliationNumber</code>	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description Required. The reconciled sequence pattern value.</p>
<code>SequencePolicyId</code>	<p>Type reference</p> <p>Properties Filter, Group, Sort</p> <p>Description Required. The parent sequence policy associated with the gap reconciliation. Deleting a sequencing policy automatically removes all its associated criteria. This field is a relationship field.</p> <p>Relationship Name SequencePolicy</p> <p>Refers To SequencePolicy</p>
<code>SequenceValue</code>	<p>Type long</p> <p>Properties Filter, Group, Sort</p> <p>Description Required. The number that was missed during sequence policy generation.</p>

Field	Details
Status	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description The current status of the missed number. Valid values are:</p> <ul style="list-style-type: none"> • Assigned • Blocked • Unassigned • Under Review

SequencePolicy

Represents the configuration of rules and parameters for generating unique, sequential numbers for records. Stores settings such as numbering patterns, prefixes, suffixes, sequence start numbers, increment values, and filter criteria to ensure accurate and compliant numbering. 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()`

Special Access Rules

You need the Billing Admin permission set to access this object.

Fields

Field	Details
DateStampFormat	<p>Type picklist</p> <p>Properties Filter, Group, Restricted picklist, Sort</p> <p>Description Required. The format of the stamp date that's appended to the sequence number. Valid values are:</p> <ul style="list-style-type: none"> • MM-YYYY—Month Year (MM-YYYY) • MM-dd-yyyy—Month Day Year (MM-DD-YYYY) • None

Field	Details
	<ul style="list-style-type: none"> • YYYY—Year (YYYY) • YYYY-YY—Org Fiscal Year (YYYY-YY)
Description	<p>Type textarea</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Additional details about the sequencing policy.</p>
EffectiveFromDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description Required. The date and time when the policy becomes effective.</p>
ExpirationDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The date and time when the policy expires.</p>
IncrementByNumber	<p>Type long</p> <p>Properties Filter, Group, Sort</p> <p>Description Required. The sequence number increment value.</p>
IsActive	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Required. Indicates whether the policy is active (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p>

Field	Details
	<p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed a sequence policy record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed a sequence policy record. If this value is null, it's possible that the user only accessed the sequence policy record or a related list view (<code>LastReferencedDate</code>), but not viewed the sequence policy record itself.</p>
MaximumSequenceNumber	<p>Type long</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The maximum number the sequence number can reach. The maximum width is determined by the maximum sequence number value.</p>
MinimumSequenceNumberWidth	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The minimum number of digits a sequence number must have. For example, if the minimum width is set to 3, sequence numbers appear as 001, 002, and so on. If the maximum sequence number is 99999, the width would be 5 digits.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Required. The name of the sequence policy.</p>
OwnerId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Required. The ID of the user who owns a sequence policy record. This field is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Refers To Group, User</p>
Prefix	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description A string added to the start of the sequence number.</p>
SelectionLogic	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The logic that determines the records to which the sequence policy applies.</p>
SequenceMode	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Required. Specifies how sequence numbers are generated. Valid values are:</p> <ul style="list-style-type: none"> • <code>Basic</code>—Gaps are allowed, such as when a record is canceled or rolled back. • <code>Gapless</code>—Numbers follow one after another with no gaps.
SequencePattern	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. The structure of a sequence.</p>

Field	Details
SequenceStartNumber	<p>Type long</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. The starting sequence number.</p>
Suffix	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description A string added to the end of the sequence number.</p>
TargetObject	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. The object to which the policy is applied.</p>
TimeZone	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The time zone applicable to the date and time related fields of the policy. When not specified, it takes the user's time zone by default. The time zone is shown in Greenwich Mean Time (GMT).</p>

TaxEngine

Represents information about an instance of a tax engine provider as well as the merchant credentials for that specific instance. 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

You need the Tax Admin permission set to access this object.

Fields

Field	Details
Description	<p>Type textarea</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The description of an instance of the tax engine provider and merchant credential.</p>
ExternalReference	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description Information about the external platform used for the tax engine.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed a tax engine record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed a tax engine record. If this value is null, it's possible that the user only accessed the tax engine record or a related list view (<code>LastReferencedDate</code>), but not viewed the tax engine record itself.</p>
MerchantCredentialId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description Required. The merchant credential setup object in Salesforce. The Tax Calculation API sends the merchant credential's information to the external tax engine that's used for tax calculation.</p> <p>This field is a relationship field.</p> <p>Relationship Name MerchantCredential</p> <p>Refers To NamedCredential</p>
SellerCode	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Required. The seller code of the transaction for which the tax engine integration log was captured.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Required. The status of the tax engine record.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • Active • Inactive
TaxEngineAddress	<p>Type address</p> <p>Properties Filter</p> <p>Description Required. The compound form of the tax engine address. This field is used when the request doesn't contain a Ship To address. See Address Compound Fields for details on compound address fields.</p> <p>This field is a read-only field.</p>
TaxEngineName	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p>

Field	Details
	<p>Description Required. The name of the tax engine record.</p>
TaxEngineProviderId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Required. The tax engine provider that's related to the tax engine record. This field is a relationship field.</p> <p>Relationship Name TaxEngineProvider</p> <p>Refers To TaxEngineProvider</p>
TaxPrvdAccountIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The unique identifier of the external tax provider's account. Available in API version 63.0 and later.</p>
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The type of the tax engine that's used to calculate tax. Valid values are:</p> <ul style="list-style-type: none"> • CommerceTaxExtension • RevenueCloudTaxExtension • StandardTaxEngine • StripeNative <p>Available in API version 63.0 and later.</p>

TaxEngineInteractionLog

Represents a record of a communication with an external tax engine following a tax calculation request. This object is available in API version 62.0 and later.

Supported Calls

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

Special Access Rules

You need the Tax Admin permission set to access this object.

Fields

Field	Details
Description	<p>Type textarea</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Additional details about the tax engine interaction log.</p>
DocumentCode	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Document code of the transaction for which the tax engine integration log was captured.</p>
EffectiveDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date that the tax engine request takes effect. This date is available for reference and bookkeeping only and doesn't have any impact on tax calculation.</p>
InteractionHttpStatusCode	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The HTTP result code of the external callout made to a third-party tax engine provider. Refer to your third-party tax engine provider's documentation for details about the specific codes returned.</p>

Field	Details
InteractionType	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Indicates the type of request made to the tax engine. Valid value is:</p> <ul style="list-style-type: none">• CalculateTax
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed a tax engine interaction log record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed a tax engine interaction log record. If this value is null, it's possible that the user only accessed the tax engine interaction log record or a related list view (<code>LastReferencedDate</code>), but not viewed the tax engine interaction log record itself.</p>
ReferenceEntity	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The record on which tax was calculated.</p>
RequestBody	<p>Type base64</p> <p>Properties Nillable</p> <p>Description The content of the tax calculation API request.</p>

Field	Details
RequestContentType	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description The type of data passed in the request. For example, <code>application/html</code> or <code>text/csv</code>.</p>
RequestLength	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The character length of text within the request body.</p>
RequestName	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The name of the request.</p>
RequestTaxTransactionType	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description The type of tax transaction request sent to the tax engine provider. Available in API version 65.0 and later. Valid values are:</p> <ul style="list-style-type: none"> • Credit • Debit • VoidOrCredit • VoidOrDebit
ResponseContentType	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description The method used to deliver the tax calculation API response, such as <code>application/html</code> or <code>text/vnd.salesforce.quip-template</code>.</p>

Field	Details
ResponseLength	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The character length of text within the response body.</p>
ResponseName	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The name of the response from the tax engine.</p>
ResponseTaxTransactionType	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description The type of tax transaction response received from the tax engine provider. Available in API version 65.0 and later. Valid values are:</p> <ul style="list-style-type: none"> • Credit • Debit • Void
ResultCode	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description The code describing the result of the request. Valid values are:</p> <ul style="list-style-type: none"> • AdapterException • ReferenceDocumentCodeMissing • Success • TaxEngineError • ValidationError

Field	Details
TaxEngineId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The ID of the tax engine used in the tax calculation process. This field is a relationship field.</p> <p>Relationship Name TaxEngine</p> <p>Refers To TaxEngine</p>
TaxEngineInteractionLogNumber	<p>Type string</p> <p>Properties Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p>Description A system-generated number for a log entry.</p>

TaxEngineProvider

Represents general information about a service that manages a tax engine. Tax engine providers have a one-to-many relationship with tax engines, where the tax engine record represents a specific configuration of a tax engine that can be assigned to multiple order items. This object is available in API version 62.0 and later.

Supported Calls

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

Special Access Rules

You need the Tax Admin permission set to access this object.

Fields

Field	Details
ApexAdapterId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The ID of the Apex adapter used by the tax provider. This field is unique within your organization.</p> <p>This field is a relationship field.</p> <p>Relationship Name ApexAdapter</p> <p>Refers To ApexClass</p>
CustomMetadataTypeApiName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The API name of the custom metadata type that defines field mappings for tax callout requests and responses. The custom metadata type name is referenced by the tax engine provider to identify the metadata configuration to use. Available in API version 65.0 and later.</p>
Description	<p>Type textarea</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Additional details about the tax engine provider.</p>
DeveloperName	<p>Type string</p> <p>Properties Create, Filter, Group, Sort, Update</p> <p>Description Required. The API name for the tax engine provider record.</p>
Language	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The language used by the tax engine provider. Values appear based on their language codes in Salesforce, such as da for Danish or th for Thai.</p>
MasterLabel	<p>Type string</p>

Field	Details
	<p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Required. The label used for the tax engine's API in Salesforce.</p>
NamespacePrefix	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The Apex namespace prefix of the API used for the tax engine.</p>

TaxPolicy

Represents information about a group of tax treatments, where each treatment represents parameters to determine how a particular product is taxed for a transaction line item. Tax policies are related to products, which pass the policy on to the resulting order items and in turn the billing schedules. 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

You need the Tax Admin permission set to access this object.

Fields

Field	Details
DefaultTaxTreatmentId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the default tax treatment record. When you order a product, the order product, and in turn the billing schedule receives this tax treatment. This field is a relationship field.</p> <p>Relationship Name DefaultTaxTreatment</p>

Field	Details
	<p>Refers To TaxTreatment</p>
Description	<p>Type textarea</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Additional details about the tax policy.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed an invoice batch draft to posted run record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed a tax policy record. If this value is null, it's possible that the user only accessed the tax policy record or a related list view (<code>LastReferencedDate</code>), but not viewed the tax policy record itself.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Required. The name of the tax policy.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Required. The status of the tax policy. To calculate tax for order products, products must have an active tax policy. Tax policies are created with a <code>Draft</code> status before being assigned to a product or order product. After activating a tax policy, you can't edit certain policy fields.</p>

Field	Details
	<p>Valid values are:</p> <ul style="list-style-type: none"> • Active • Draft • Inactive
TreatmentSelection	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Required. Specifies the selection of tax treatments to billing schedules that are related to the tax policy.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> • Default—Billing schedules receive the tax treatment defined in the tax policy's <code>DefaultTreatmentId</code> field. • LegalEntity—Billing schedules receive the tax treatment based on matching legal entities between itself and the tax treatment. • Manual—Billing schedules don't receive tax treatments based on the tax policy. You must specify the treatment.

TaxTreatment

Represents information about tax calculation by external engines. Each product requires a tax policy to determine whether to apply tax. Each tax policy requires at least one tax treatment. The tax treatments determine how taxable products are taxed. 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

You need the Tax Admin permission set to access this object.

Fields

Field	Details
Description	<p>Type textarea</p>

Field	Details
	<p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Additional details about the tax treatment.</p>
IsTaxable	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Required. Indicates whether to calculate tax for the order items covered by the tax treatment (<code>true</code>) or not (<code>false</code>). When this value is <code>true</code>, the CalculateTax API is called for the order item during the order item's creation. The default value is <code>false</code>.</p>
LastReferencedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last accessed a tax treatment record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The timestamp when the current user last viewed a tax treatment record. If this value is null, it's possible that the user only accessed the tax treatment record or a related list view (<code>LastReferencedDate</code>), but not viewed the tax treatment record itself.</p>
LegalEntityId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the legal entity record that's related to the tax treatment. This field is a relationship field.</p> <p>Relationship Name LegalEntity</p>

Field	Details
	<p>Refers To LegalEntity</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Required. The name of the tax treatment.</p>
ProductCode	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p>Description The code of the product that the tax treatment applies to.</p>
Status	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Required. The status of the tax treatment record. Valid values are:</p> <ul style="list-style-type: none"> • Active • Draft • Inactive
TaxCode	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The reference code that's used when an external tax engine calculates tax.</p>
TaxEngineId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description</p> <p>The ID of the tax engine record that's related to the tax treatment. When tax is calculated for an order item, the tax engine that's related to order item's tax treatment is used. If the tax treatment's <code>ISTaxable</code> field value is <code>TRUE</code>, the treatment requires a tax engine.</p> <p>This field is a relationship field.</p> <p>Relationship Name</p> <p>TaxEngine</p> <p>Refers To</p> <p>TaxEngine</p>
TaxPolicyId	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p>Description</p> <p>The ID of the tax treatment's parent tax policy.</p> <p>This field is a relationship field.</p> <p>Relationship Name</p> <p>TaxPolicy</p> <p>Refers To</p> <p>TaxPolicy</p>

Billing Fields on Standard Objects

Billing adds standard fields to some standard Salesforce objects of other features to represent information specific to Billing. These fields are available only in orgs where Billing is enabled.

[Billing Fields on AccountBillingAccount](#)

Standard fields extend the AccountBillingAccount object for use in Billing to represent information about default billing accounts. This object is available in API version 63.0 and later.

[Billing Fields on BillingAccount](#)

Standard fields extend the BillingAccount object for use in Billing to represent information about the billing suspension date and the billing resumption date. This object is available in API version 63.0 and later.

[Billing Fields on CollectionPlan](#)

Standard fields extend the CollectionPlan object for use in Billing to represent information about the total invoice balance. This object is available in API version 64.0 and later.

[Billing Fields on CollectionPlanItem](#)

Standard fields extend the CollectionPlanItem object for use in Billing to represent information about the invoice balance. This object is available in API version 64.0 and later.

[Billing Fields on Payment](#)

Standard fields extend the Payment object for use in Billing to represent information about corporate currency, transaction amounts in corporate currency, and accounting periods for legal entities. This object is available in API version 64.0 and later.

[Billing Fields on PaymentLineInvoice](#)

Standard fields extend the PaymentLineInvoice object for use in Billing to represent information about legal entities and legal entity accounting periods. This object is available in API version 64.0 and later.

[Billing Fields on Refund](#)

Standard fields extend the Refund object for use in Billing to represent information about corporate currency, transaction amounts in corporate currency, and accounting periods for legal entities. This object is available in API version 64.0 and later.

[Billing Fields on RefundLinePayment](#)

Standard fields extend the Refund Line Payment object for use in Billing to represent information about accounting periods for legal entities. This object is available in API version 64.0 and later.

[Billing Fields on TransactionJournal](#)

Standard fields extend the TransactionJournal object for use in Billing to represent information about the general ledger accounts for billing transactions. This object is available in API version 63.0 and later.

Billing Fields on AccountBillingAccount

Standard fields extend the AccountBillingAccount object for use in Billing to represent information about default billing accounts. This object is available in API version 63.0 and later.

Supported Calls

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

Special Access Rules

You need the Billing Admin permission set, Billing Operations User permission set, or Billing Customer Service User permission set access to this object.

Fields

Field	Details
<code>IsDefaultBillingAccount</code>	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates whether the account is the default billing account (<code>true</code>) or not (<code>false</code>).</p>

Field	Details
	The default value is <code>false</code> .

SEE ALSO:

[Energy and Utilities Cloud Developer Guide: AccountBillingAccount](#)

Billing Fields on BillingAccount

Standard fields extend the BillingAccount object for use in Billing to represent information about the billing suspension date and the billing resumption date. This object is available in API version 63.0 and later.

Supported Calls

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

Special Access Rules

You need the Billing Admin permission set, Billing Operations User permission set, or Billing Customer Service User permission set access to this object.

Fields

Field	Details
<code>AccountID</code>	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Specifies the account that's related to the billing account. Available in API version 65.0 and later. This field is a relationship field.</p> <p>Relationship Name Account</p> <p>Refers To Account</p>
<code>BillDayOfMonth</code>	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description A number from 1 to 31 that indicates the billing date. Available in API version 64.0 and later.</p>

Field	Details
BillToContactId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The contact associated with the billing account. Available in API version 64.0 and later. This field is a relationship field.</p> <p>Relationship Name BillToContact</p> <p>Refers To Contact</p>
BillingResumptionDate	<p>Type date</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The date when billing for the account is resumed.</p>
BillingSuspensionDate	<p>Type date</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The date when billing for the account is suspended.</p>
DoesSkipAutomaticPayments	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether to skip the automatic creation of payment schedules and payment schedule items for posted invoices related to billing accounts (<code>true</code>) or not (<code>false</code>). This boolean value is considered when the automatic creation of payment schedules and payment schedule items is turned on. Available in API version 65.0 and later.</p>
EmailTemplateId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description The template used for sending billing account emails. Available in API version 65.0 and later. This field is a relationship field.</p> <p>Relationship Name EmailTemplate</p> <p>Refers To EmailTemplate</p>
IsDefaultBillingProfile	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the billing account is the default billing profile (true) or not (false). Available in API version 65.0 and later.</p>
PaymentTermId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The payment term associated with the billing account. Available in API version 64.0 and later. This field is a relationship field.</p> <p>Relationship Name PaymentTerm</p> <p>Refers To PaymentTerm</p>
SavedPaymentMethodId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The saved payment method that's used to collect payments for the default billing profile of an account when the automatic creation of payment schedules and payment schedule items is turned on. Available in API version 65.0 and later. This field is a relationship field.</p> <p>Relationship Name SavedPaymentMethod</p> <p>Refers To SavedPaymentMethod</p>

Field	Details
ShippingAddress	<p>Type address</p> <p>Properties Filter, Nillable</p> <p>Description The shipping address of the billing account. Available in API version 64.0 and later.</p>
ShouldAttachInvoiceDocToEmail	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether to attach the invoice PDF document to the email that's sent to the billing account. Available in API version 65.0 and later. The default value is false.</p>

SEE ALSO:

[Energy and Utilities Cloud Developer Guide: BillingAccount](#)

Billing Fields on CollectionPlan

Standard fields extend the CollectionPlan object for use in Billing to represent information about the total invoice balance. This object is available in API version 64.0 and later.

Supported Calls

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

Special Access Rules

You need the Revenue Cloud Billing license, and the Billing Collections and Recovery Specialist permission set to access this object.

Fields

Field	Details
TotalInvoiceBalance	<p>Type currency</p> <p>Properties Filter, Nillable, Sort</p>

Field	Details
	<p>Description</p> <p>The sum of all invoice balances for collection plan items associated with the collection plan.</p>

Associated Objects

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

CollectionPlanChangeEvent on page 2169

Change events are available for the object.

CollectionPlanFeed on page 2171

Feed tracking is available for the object.

CollectionPlanHistory on page 2178

History is available for tracked fields of the object.

CollectionPlanShare on page 2182

Sharing is available for the object.

SEE ALSO:

[Industries Common Resources Developer Guide: CollectionPlan](#)

Billing Fields on CollectionPlanItem

Standard fields extend the CollectionPlanItem object for use in Billing to represent information about the invoice balance. This object is available in API version 64.0 and later.

Supported Calls

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

Special Access Rules

You need the Revenue Cloud Billing license, and the Billing Collections and Recovery Specialist permission set to access this object.

Fields

Field	Details
InvoiceBalance	<p>Type</p> <p>currency</p> <p>Properties</p> <p>Filter, Nillable, Sort</p>

Field	Details
	<p>Description</p> <p>The balance amount of the invoice associated with the collection plan item.</p>

Associated Objects

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

CollectionPlanItemChangeEvent on page 2169

Change events are available for the object.

CollectionPlanItemFeed on page 2171

Feed tracking is available for the object.

CollectionPlanItemHistory on page 2178

History is available for tracked fields of the object

SEE ALSO:

[Industries Common Resources Developer Guide: CollectionPlanItem](#)

Billing Fields on Payment

Standard fields extend the Payment object for use in Billing to represent information about corporate currency, transaction amounts in corporate currency, and accounting periods for legal entities. This object is available in API version 64.0 and later.

Supported Calls

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

Special Access Rules

You need the Revenue Cloud Billing license, and the Payment Admin permission set or the Payment Operations User permission set to access this object.

Fields

Field	Details
CorporateCurrencyCnvAmount	<p>Type</p> <p>double</p> <p>Properties</p> <p>Filter, Nillable, Sort, Update</p> <p>Description</p> <p>The payment amount in corporate currency.</p>

Field	Details
CorporateCurrencyCvsnDate	<p>Type date</p> <p>Properties Filter, Group, Nillable, Sort, Update</p> <p>Description The date on which the payment amount is converted into corporate currency.</p>
CorporateCurrencyCvsnRate	<p>Type double</p> <p>Properties Filter, Nillable, Sort, Update</p> <p>Description The exchange rate that's used to convert the payment amount into corporate currency.</p>
CorporateCurrencyIsoCode	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort, Update</p> <p>Description The currency ISO code of the corporate currency.</p>
LegalEntityAccountingPeriodId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The legal entity accounting period related to the payment. This field is a relationship field.</p> <p>Relationship Name LegalEntityAccountingPeriod</p> <p>Refers To LegalEntityAccountingPeriod</p>
LegalEntityId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The legal entity related to the payment. This field is a relationship field.</p>

Field	Details
	<p>Relationship Name LegalEntity</p> <p>Refers To LegalEntity</p>

Associated Objects

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

PaymentFeed on page 2171

Feed tracking is available for the object.

SEE ALSO:

[Object Reference for the Salesforce Platform: Payment](#)

Billing Fields on PaymentLineInvoice

Standard fields extend the PaymentLineInvoice object for use in Billing to represent information about legal entities and legal entity accounting periods. This object is available in API version 64.0 and later.

Supported Calls

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

Special Access Rules

You need the Revenue Cloud Billing license, and the Payment Admin permission set or the Payment Operations User permission set to access this object.

Fields

Field	Details
LegalEntityAccountingPeriodId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The legal entity accounting period related to the payment line invoice. This field is a relationship field.</p>

Field	Details
	<p>Relationship Name LegalEntityAccountingPeriod</p> <p>Refers To LegalEntyAccountingPeriod</p>
LegalEntityId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The legal entity related to the payment line invoice. This field is a relationship field.</p> <p>Relationship Name LegalEntity</p> <p>Refers To LegalEntity</p>

SEE ALSO:

[Object Reference for the Salesforce Platform: PaymentLineInvoice](#)

Billing Fields on Refund

Standard fields extend the Refund object for use in Billing to represent information about corporate currency, transaction amounts in corporate currency, and accounting periods for legal entities. This object is available in API version 64.0 and later.

Supported Calls

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

Special Access Rules

You need the Revenue Cloud Billing license, and the Payment Admin permission set or the Payment Operations User permission set to access this object.

Fields

Field	Details
CorporateCurrencyCnvAmount	<p>Type double</p>

Field	Details
	<p>Properties Filter, Nillable, Sort, Update</p> <p>Description The refund amount in corporate currency.</p>
CorporateCurrencyCvsnDate	<p>Type date</p> <p>Properties Filter, Group, Nillable, Sort, Update</p> <p>Description The date on which the refund amount is converted into corporate currency.</p>
CorporateCurrencyCvsnRate	<p>Type double</p> <p>Properties Filter, Nillable, Sort, Update</p> <p>Description The exchange rate that's used to convert the refund amount into corporate currency.</p>
CorporateCurrencyIsoCode	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort, Update</p> <p>Description The currency ISO code of the corporate currency.</p>
LegalEntityAccountingPeriodId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The legal entity accounting period related to the refund. This field is a relationship field.</p> <p>Relationship Name LegalEntityAccountingPeriod</p> <p>Refers To LegalEntityAccountingPeriod</p>
LegalEntityId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The legal entity related to the refund. This field is a relationship field.</p> <p>Relationship Name LegalEntity</p> <p>Refers To LegalEntity</p>

SEE ALSO:

[Object Reference for the Salesforce Platform: Refund](#)

Billing Fields on RefundLinePayment

Standard fields extend the Refund Line Payment object for use in Billing to represent information about accounting periods for legal entities. This object is available in API version 64.0 and later.

Special Access Rules

You need the Revenue Cloud Billing license, and the Payment Admin permission set or the Payment Operations User permission set to access this object.

Fields

Field	Details
LegalEntityAccountingPeriodId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The legal entity accounting period related to the refund. This field is a relationship field.</p> <p>Relationship Name LegalEntityAccountingPeriod</p> <p>Refers To LegalEntityAccountingPeriod</p>
LegalEntityId	<p>Type reference</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The legal entity related to the refund. This field is a relationship field.</p> <p>Relationship Name LegalEntity</p> <p>Refers To LegalEntity</p>

Billing Fields on TransactionJournal

Standard fields extend the TransactionJournal object for use in Billing to represent information about the general ledger accounts for billing transactions. This object is available in API version 63.0 and later.

Supported Calls

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

Special Access Rules

You need the Revenue Cloud Billing license and the Accounts Receivables Admin permission set to access this object.

Fields

Field	Details
ActivityDate	<p>Type dateTime</p> <p>Properties Create, Filter, Sort, Update</p> <p>Description The date and time when a billing transaction record is posted or processed.</p>
Credit	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The transaction record amount when a credit general ledger account is specified.</p>

Field	Details
CreditGeneralLedgerAccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the general ledger account for a debit transaction that's related to the transaction journal. This field is a relationship field.</p> <p>Relationship Name CreditGeneralLedgerAccount</p> <p>Refers To GeneralLedgerAccount</p>
Debit	<p>Type currency</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The transaction record amount when a debit general ledger account is specified.</p>
DebitGeneralLedgerAccountId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The ID of the General Ledger (GL) Treatment based on which transaction journals must be generated for the billing transaction. This field is a relationship field.</p> <p>Relationship Name DebitGeneralLedgerAccount</p> <p>Refers To GeneralLedgerAccount</p>
ForeignExchangeGainOrLossType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Specifies the type of foreign exchange gain or loss for the transaction journal. This field is available in API version 65.0 and later. Valid values are:</p>

Field	Details
	<ul style="list-style-type: none"> Realized Unrealized UnrealizedReversal
GeneralLedgerAcctAsgntRuleId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The general ledger account assignment rule used to assign general ledger accounts to transaction journals that's created for billing transactions. This field is a relationship field.</p> <p>Relationship Name GeneralLedgerAcctAsgntRule</p> <p>Refers To GeneralLedgerAcctAsgntRule</p>
GenlLdgrJournalEntryRuleId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The general ledger journal entry rule used to assign general ledger accounts to transaction journals created for billing transactions. This field is available in API version 65.0 and later. This field is a relationship field.</p> <p>Relationship Name GenlLdgrJournalEntryRule</p> <p>Refers To GeneralLedgerJrnEntryRule</p>
LegalEntityId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The legal entity that's related to the transaction journal. This field is a relationship field.</p> <p>Relationship Name LegalEntity</p> <p>Refers To LegalEntity</p>

Field	Details
ReferenceTransactionRecordId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The transaction record for which the transaction journal is created. This field is a polymorphic relationship field.</p> <p>Relationship Name ReferenceTransactionRecord</p> <p>Refers To CreditMemo, CreditMemoInvApplication, CreditMemoLine, CreditMemoLineInvoiceLine, CreditMemoLineTax, Invoice, InvoiceLine, InvoiceLineTax, Payment, PaymentLineInvoice, PaymentLineInvoiceLine, Refund</p>
TransactionType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The transaction type that's related to the transaction journal. Valid values are:</p> <ul style="list-style-type: none"> • CreditMemo • CreditMemoInvApplication • CreditMemoLine • CreditMemoLineTax • CreditMemoLineInvoiceLine • DebitMemoLine—Available in API version 65.0 and later. • Invoice • InvoiceLine • InvoiceLineTax • Payment—Available in API version 64.0 and later. • PaymentLineInvoice—Available in API version 64.0 and later. • PaymentLineInvoiceLine—Available in API version 64.0 and later. • Refund—Available in API version 64.0 and later. • RefundLine—Available in API version 64.0 and later.
UniqueIdentifier	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description</p> <p>An auto-generated identifier for the transaction journal when the usage type is Billing. The identifier is a combination of the reference transaction record ID, the general ledger account assignment rule ID, and other internal-only fields.</p>
UsageType	<p>Type</p> <p>picklist</p> <p>Properties</p> <p>Create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description</p> <p>The type of usage.</p> <p>Valid value is:</p> <ul style="list-style-type: none"> • Billing

SEE ALSO:

[Loyalty Management Developer Guide: TransactionJournal](#)

Salesforce Payments Objects in Billing

Billing provides access to some standard Salesforce Payments objects that you can use to authorize payments, connect to an external payment gateway, group all the payment transactions that are processed for a particular transaction, and store payment methods. You can access these objects with the Revenue Cloud Billing license.

For more information about these Salesforce Payments objects, refer to these resources.

- [PaymentAuthAdjustment](#)
- [PaymentAuthorization](#)
- [PaymentGateway](#)
- [PaymentGatewayLog](#)
- [PaymentGatewayProvider](#)
- [PaymentGroup](#)
- [PaymentMethod](#)

Billing Platform Events

Salesforce publishes standard platform events in response to an action that occurred in the org or to report errors. For example, the InvoiceProcessedEvent platform event sends notification to the customer when the billing invoice activity is complete. You can subscribe to a standard platform event by using the subscription mechanism that the event supports.

[BillingScheduleCreatedEvent](#)

Notifies subscribers when the `/commerce/invoicing/billing-schedules/actions/create` request is complete. This object is available in API version 63.0 and later.

[CreditInvoiceProcessedEvent](#)

Represents the notification to the customers after the process initiated by the `/commerce/invoicing/invoices/{invoiceId}/actions/credit` request is complete. This object is available in API version 62.0 and later.

[CreditMemoProcessedEvent](#)

Represents the notification to the customers after the process initiated by the `/commerce/invoicing/credit-memos` request is complete. This object is available in API version 62.0 and later.

[InvoiceProcessedEvent](#)

Represents the notification to the customers after the process started by the `/commerce/billing/invoices` request is complete. The process groups billing schedules by grouping keys and creates one invoice per grouping key. The `InvoiceProcessedEvent` platform event is a top-level object that contains a list of `InvoiceProcessedDetailEvents` platform events, where each detail event represents an attempt to create one invoice. This object is available in API version 62.0 and later.

[NegInvcLineProcessedEvent](#)

Represents the notification to the customers when a negative invoice line is converted to a credit memo. This object is available in API version 62.0 and later.

[SequenceAssignedEvent](#)

Represents the notification to customers about the assignment of a sequence to a target record. This process is initiated by the `/sequences/actions/assign` request. This object is available in API version 65.0 and later.

[VoidInvoiceProcessedEvent](#)

Represents the notification to the customers after the process started by the `/commerce/invoicing/invoices/{invoiceId}/actions/void` request is complete. The request attempts to void an invoice by crediting an invoice and changing its status to `Voided`, which prevents further changes. This object is available in API version 62.0 and later.

BillingScheduleCreatedEvent

Notifies subscribers when the `/commerce/invoicing/billing-schedules/actions/create` request is complete. This object is available in API version 63.0 and later.

Supported Calls

`describeSObjects()`

Supported Subscribers

Subscriber	Supported?
Apex Triggers	✓
Flows	✓
Processes	✓

Subscriber	Supported?
Pub/Sub API	✓
Streaming API (CometD)	✓

Subscription Channel

/event/billingschedulecreatedevent

Event Delivery Allocation Enforced

No

Special Access Rules

This object is available when Billing is enabled.

Fields

Field	Details
BillingScheduleCreatedEventDetail	<p>Type BillSchdCreatedEventDetail on page 1778</p> <p>Properties Nillable</p> <p>Description One <code>BillingScheduleCreatedEventDetail</code> entry is created for each order item in the <code>BillingScheduleCreatedEvent</code> request. One <code>BillSchdCreatedEventDetail</code> entry is created for each error that occurred.</p>
CorrelationIdentifier	<p>Type string</p> <p>Properties Nillable</p> <p>Description Reserved for future use.</p>
EventUuid	<p>Type string</p> <p>Properties Nillable</p> <p>Description A universally unique identifier (UUID) that identifies a platform event message.</p>

Field	Details
ReplayId	<p>Type string</p> <p>Properties Nillable</p> <p>Description Represents an ID value that is populated by the system and refers to the position of the event in the event stream. Replay ID values aren't guaranteed to be contiguous for consecutive events. A subscriber can store a replay ID value and use it on resubscription to retrieve missed events that are within the retention window.</p>
RequestIdentifier	<p>Type string</p> <p>Properties Nillable</p> <p>Description ID returned in the <code>CreateBillingScheduleFromOrderItem</code> response. Use this ID to identify the <code>BillingScheduleCreatedEvent</code> for a specific request.</p>

[BillSchdCreatedEventDetail](#)

Contains details about each order item in the `/commerce/invoicing/billing-schedules/actions/create` request and any errors that occurred while processing the request. This object is included in an `BillingScheduleCreatedEvent` message. You can't subscribe to the `BillSchdCreatedEventDetail` platform event directly. This object is available in API version 63.0 and later.

BillSchdCreatedEventDetail

Contains details about each order item in the `/commerce/invoicing/billing-schedules/actions/create` request and any errors that occurred while processing the request. This object is included in an `BillingScheduleCreatedEvent` message. You can't subscribe to the `BillSchdCreatedEventDetail` platform event directly. This object is available in API version 63.0 and later.

Supported Calls

`describeSObjects()`

Special Access Rules

This object is available when Billing is enabled in your org.

Fields

Field	Details
BillingScheduleId	<p>Type reference</p> <p>Properties Nillable</p> <p>Description If the request was successful, this field contains the ID of the billing schedule for the order item. This field is a relationship field.</p> <p>Relationship Name BillingSchedule</p> <p>Refers To BillingSchedule</p>
ErrorCode	<p>Type string</p> <p>Properties Nillable</p> <p>Description If the request wasn't successful, this field contains the error code.</p>
ErrorMessage	<p>Type string</p> <p>Properties Nillable</p> <p>Description If the request wasn't successful, this field contains the error message.</p>
EventUuid	<p>Type string</p> <p>Properties Nillable</p> <p>Description A universally unique identifier (UUID) that identifies a platform event message.</p>
IsSuccess	<p>Type boolean</p> <p>Properties Defaulted on create</p>

Field	Details
	<p>Description</p> <p>Indicates whether the request to create a billing schedule for the order item is successful (<code>true</code>) or not (<code>false</code>).</p> <p>The default value is <code>false</code>.</p>
OrderItemId	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Description</p> <p>The ID of the order item used in the <code>/actions/standardCreateBillingScheduleFromOrderItem</code> REST request.</p> <p>This field is a relationship field.</p> <p>Relationship Name</p> <p>OrderItem</p> <p>Refers To</p> <p>OrderItem</p>

CreditInvoiceProcessedEvent

Represents the notification to the customers after the process initiated by the `/commerce/invoicing/invoices/{invoiceId}/actions/credit` request is complete. This object is available in API version 62.0 and later.

Supported Calls

`describeSObjects()`

Supported Subscribers

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

Subscription Channel

`/event/CreditInvoiceProcessedEvent`

Event Delivery Allocation Enforced

No

Special Access Rules

This object is available when Billing is enabled.

Fields

Field	Details
<code>CorrelationIdentifier</code>	<p>Type string</p> <p>Properties Nillable</p> <p>Description Reserved for future use.</p>
<code>CrMemoProcessErrDtlEvents</code>	<p>Type CrMemoProcessErrDtlEvent[]</p> <p>Properties Nillable</p> <p>Description A compilation of error messages and error codes for a failed request. See the <code>ErrorDetails</code> field for error messages and error codes.</p>
<code>CreditMemoId</code>	<p>Type reference</p> <p>Properties Nillable</p> <p>Description The credit memo created as the result of a successful request. This field is a relationship field.</p> <p>Relationship Name CreditMemo</p> <p>Refers To CreditMemo</p>
<code>ErrorDetails</code>	<p>Type string</p> <p>Properties Nillable</p>

Field	Details
	Description If the request fails, this field shows error messages, error codes, and the ID of the record on which the errors occurred.
EventUuid	Type string Properties Nillable Description A universally unique identifier (UUID) that identifies a platform event message.
InvoiceId	Type reference Properties Nillable Description The invoice credited as the result of a successful request. This field is a relationship field. Relationship Name Invoice Refers To Invoice
IsSuccess	Type boolean Properties Defaulted on create Description Required. Indicates whether the request was successful (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code> .
ReplayId	Type string Properties Nillable Description An ID value that's populated by the system and refers to the position of the event in the event stream. Replay ID values aren't guaranteed to be contiguous for consecutive events. A subscriber can store a replay ID value and use it on resubscription to retrieve missed events that are within the retention window.

Field	Details
RequestIdentifier	<p>Type string</p> <p>Properties Nillable</p> <p>Description The unique ID returned in the response. Use this ID to identify the event for a specific request.</p>

[CrMemoProcessErrDtlEvent](#)

Represents the information about errors that occurred while creating or applying a credit memo as part of a request. This object is included in a `CreditInvoiceProcessedEvent`, `CreditMemoProcessedEvent`, `NegInvcLineProcessedEvent`, or `VoidInvoiceProcessedEvent` platform event message. You can't subscribe to `CrMemoProcessErrDtlEvent` platform event directly. This object is available in API version 62.0 and later.

CrMemoProcessErrDtlEvent

Represents the information about errors that occurred while creating or applying a credit memo as part of a request. This object is included in a `CreditInvoiceProcessedEvent`, `CreditMemoProcessedEvent`, `NegInvcLineProcessedEvent`, or `VoidInvoiceProcessedEvent` platform event message. You can't subscribe to `CrMemoProcessErrDtlEvent` platform event directly. This object is available in API version 62.0 and later.

Supported Calls

`describeSObjects()`

Special Access Rules

This object is available when Billing is enabled.

Fields

Field	Details
ErrorCode	<p>Type string</p> <p>Properties Nillable</p> <p>Description Reference code for the type of error that occurred.</p>
ErrorMessage	<p>Type string</p> <p>Properties Nillable</p>

Field	Details
	<p>Description</p> <p>Information about the error that occurred during processing.</p>
ErrorSourceId	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Nullable</p> <p>Description</p> <p>The ID of the record on which the error occurred during the credit memo creation process and the application process.</p> <p>This field is a polymorphic relationship field.</p> <p>Relationship Name</p> <p>ErrorSource</p> <p>Refers To</p> <p>CreditMemo, CreditMemoLine, Invoice, InvoiceLine</p>
EventUuid	<p>Type</p> <p>string</p> <p>Properties</p> <p>Nullable</p> <p>Description</p> <p>A universally unique identifier (UUID) that identifies a platform event message.</p>

CreditMemoProcessedEvent

Represents the notification to the customers after the process initiated by the `/commerce/invoicing/credit-memos` request is complete. This object is available in API version 62.0 and later.

Supported Calls

`describeSObjects()`

Supported Subscribers

Subscriber	Supported?
Apex Triggers	✓
Flows	✓
Processes	✓
Pub/Sub API	✓

Subscriber	Supported?
Streaming API (CometD)	✓

Subscription Channel

/event/CreditMemoProcessedEvent

Event Delivery Allocation Enforced

No

Special Access Rules

This object is available when Billing is enabled.

Fields

Field	Details
CorrelationIdentifier	<p>Type string</p> <p>Properties Nillable</p> <p>Description Reserved for future use.</p>
CrMemoProcessErrDtlEvents	<p>Type CrMemoProcessErrDtlEvent[]</p> <p>Properties Nillable</p> <p>Description A compilation of error messages and error codes for a failed request. See the <code>ErrorDetails</code> field for error messages and error codes.</p>
CreditMemoId	<p>Type reference</p> <p>Properties Nillable</p> <p>Description The credit memo created as the result of a successful request. This field is a relationship field.</p> <p>Relationship Name CreditMemo</p>

Field	Details
	<p>Refers To CreditMemo</p>
ErrorDetails	<p>Type string</p> <p>Properties Nillable</p> <p>Description If the request fails, this field shows error messages, error codes, and the ID of the record on which the errors occurred.</p>
EventUuid	<p>Type string</p> <p>Properties Nillable</p> <p>Description A universally unique identifier (UUID) that identifies a platform event message.</p>
IsSuccess	<p>Type boolean</p> <p>Properties Defaulted on create</p> <p>Description Required. Indicates whether the request was successful (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
ReplayId	<p>Type string</p> <p>Properties Nillable</p> <p>Description Represents an ID value that's populated by the system and refers to the position of the event in the event stream. Replay ID values aren't guaranteed to be contiguous for consecutive events. A subscriber can store a replay ID value and use it on resubscription to retrieve missed events that are within the retention window.</p>
RequestIdIdentifier	<p>Type string</p> <p>Properties Nillable</p> <p>Description The unique ID returned in the response. Use this ID to identify the event for a specific request.</p>

InvoiceProcessedEvent

Represents the notification to the customers after the process started by the `/commerce/billing/invoices` request is complete. The process groups billing schedules by grouping keys and creates one invoice per grouping key. The

`InvoiceProcessedEvent` platform event is a top-level object that contains a list of `InvoiceProcessedDetailEvents` platform events, where each detail event represents an attempt to create one invoice. This object is available in API version 62.0 and later.

Supported Calls

`describeSObjects()`

Supported Subscribers

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

Subscription Channel

`/event/InvoiceProcessedEvent`

Event Delivery Allocation Enforced

No

Special Access Rules

This object is available when Billing is enabled.

Fields

Field	Details
<code>CorrelationIdentifier</code>	<p>Type string</p> <p>Properties Nillable</p> <p>Description Reserved for future use.</p>

Field	Details
EventUuid	<p>Type string</p> <p>Properties Nillable</p> <p>Description A universally unique identifier (UUID) that identifies a platform event message.</p>
InvoiceErrorDetailEvent	<p>Type InvoiceErrorDetailEvent[]</p> <p>Properties Nillable</p> <p>Description Information about errors that occurred during processing.</p>
InvoiceProcessedDetailEvents	<p>Type InvoiceProcessedDetailEvent[]</p> <p>Properties Nillable</p> <p>Description A list of <code>InvoiceProcessedDetailEvent</code> records. Each record contains information about an attempt to create an invoice from one or more billing schedules that share a grouping key.</p>
IsSuccess	<p>Type boolean</p> <p>Properties Defaulted on create</p> <p>Description Required. Indicates whether the Create Order from Invoice action was successful (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
ReplayId	<p>Type string</p> <p>Properties Nillable</p> <p>Description An identification (ID) value that's populated by the system and refers to the position of the event in the event stream. Replay ID values aren't guaranteed to be contiguous for consecutive events. A user can store a replay ID value and use it on resubscription to retrieve missed events that are within the retention window.</p>

Field	Details
RequestIdentifier	<p>Type string</p> <p>Properties Nillable</p> <p>Description A unique ID returned in the <code>/commerce/billing/invoices</code> response. Use this ID to identify the event for a specific request.</p>

[InvoiceErrorDetailEvent](#)

Represents information about the errors that occurred during the processing of a `/commerce/billing/invoices` request. This object is included in an `InvoiceProcessedEvent` platform event message. You can't subscribe to `InvoiceProcessedEvent` platform event directly. This object is available in API version 62.0 and later.

[InvoiceProcessedDetailEvent](#)

Represents the notification to customers regarding the results of an attempt to create an invoice from billing schedules as part of `/commerce/billing/invoices` request. The `InvoiceProcessedDetailEvent` platform event contains the results of an attempt to create an invoice from one or more billing schedules that share a grouping key. Each `InvoiceProcessedDetailEvent` platform event for an action is grouped within the parent `InvoiceProcessedDetailEvent` platform event. This object is available in API version 62.0 and later.

InvoiceErrorDetailEvent

Represents information about the errors that occurred during the processing of a `/commerce/billing/invoices` request. This object is included in an `InvoiceProcessedEvent` platform event message. You can't subscribe to `InvoiceProcessedEvent` platform event directly. This object is available in API version 62.0 and later.

Supported Calls

`describeSObjects()`

Special Access Rules

This object is available when Billing is enabled.

Fields

Field	Details
ErrorCode	<p>Type string</p> <p>Properties None</p> <p>Description Reference code for the type of error that occurred.</p>

Field	Details
ErrorMessage	<p>Type string</p> <p>Properties None</p> <p>Description Information about the error that occurred during processing.</p>
ErrorSourceId	<p>Type reference</p> <p>Properties Nillable</p> <p>Description The ID of the record where the error occurred. This record can be an invoice or a billing schedule. This field is a polymorphic relationship field.</p> <p>Relationship Name ErrorSource</p> <p>Refers To BillingSchedule, Invoice</p>
EventUuid	<p>Type string</p> <p>Properties Nillable</p> <p>Description A universally unique identifier (UUID) that identifies a platform event message.</p>

InvoiceProcessedDetailEvent

Represents the notification to customers regarding the results of an attempt to create an invoice from billing schedules as part of `/commerce/billing/invoices` request. The `InvoiceProcessedDetailEvent` platform event contains the results of an attempt to create an invoice from one or more billing schedules that share a grouping key. Each `InvoiceProcessedDetailEvent` platform event for an action is grouped within the parent `InvoiceProcessedDetailEvent` platform event. This object is available in API version 62.0 and later.

Supported Calls

`describeSObjects()`

Supported Subscribers

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

Subscription Channel

/event/InvoiceProcessedEvent

Event Delivery Allocation Enforced

No

Special Access Rules

This object is available when Billing is enabled.

Fields

Field	Details
EventUuid	<p>Type string</p> <p>Properties Nillable</p> <p>Description A universally unique identifier (UUID) that identifies a platform event message.</p>
InvoiceErrorDetailEvents	<p>Type InvoiceErrorDetailEvent[]</p> <p>Properties Nillable</p> <p>Description A list of errors that occurred while attempting to create the invoice.</p>
InvoiceId	<p>Type reference</p> <p>Properties Nillable</p>

Field	Details
	<p>Description The ID of the new invoice. This field is a relationship field.</p> <p>Relationship Name Invoice</p> <p>Refers To Invoice</p>
InvoiceStatus	<p>Type string</p> <p>Properties Nillable</p> <p>Description The value of the <code>Status</code> field on the invoice.</p>
IsSuccess	<p>Type boolean</p> <p>Properties Defaulted on create</p> <p>Description Required. Indicates whether the invoice creation attempt was successful (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>

NegInvLineProcessedEvent

Represents the notification to the customers when a negative invoice line is converted to a credit memo This object is available in API version 62.0 and later.

Supported Calls

`describeSObjects()`

Supported Subscribers

Subscriber	Supported?
Apex Triggers	✓
Flows	✓
Processes	✓

Subscriber	Supported?
Pub/Sub API	✓
Streaming API (CometD)	✓

Subscription Channel

/event/NegInvcLineProcessedEvent

Event Delivery Allocation Enforced

No

Special Access Rules

This object is available when Billing is enabled.

Fields

Field	Details
CorrelationIdentifier	<p>Type string</p> <p>Properties Nillable</p> <p>Description Reserved for future use.</p>
CrMemoProcessErrDtlEvents	<p>Type CrMemoProcessErrDtlEvent</p> <p>Properties Nillable</p> <p>Description A compilation of error messages and error codes for a failed request. See the <code>ErrorDetails</code> field for error messages and error codes.</p>
CreditMemoId	<p>Type reference</p> <p>Properties Nillable</p> <p>Description The ID of the credit memo created as a result of the successful conversion of a negative invoice line. This field is a relationship field.</p>

Field	Details
	<p>Relationship Name CreditMemo</p> <p>Refers To CreditMemo</p>
ErrorDetails	<p>Type string</p> <p>Properties Nillable</p> <p>Description If the request fails, this field shows error messages, error codes, and the ID of the record on which the errors occurred.</p>
EventUuid	<p>Type string</p> <p>Properties Nillable</p> <p>Description A universally unique identifier (UUID) that identifies a platform event message.</p>
InvoiceId	<p>Type reference</p> <p>Properties Nillable</p> <p>Description The ID of the invoice that this event is in reference to. This field is a relationship field.</p> <p>Relationship Name Invoice</p> <p>Refers To Invoice</p>
IsAutomatedNegativeInvoiceLineConversion	<p>Type boolean</p> <p>Properties Defaulted on create</p> <p>Description Indicates whether this event is generated either by an automated process to convert negative invoice lines to credit memos (<code>true</code>) or by a manual process (<code>false</code>). The default value is <code>false</code>.</p>

Field	Details
IsSuccess	<p>Type boolean</p> <p>Properties Defaulted on create</p> <p>Description Required. Indicates whether the negative invoice lines were converted successfully to credit memos (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
ReplayId	<p>Type string</p> <p>Properties Nillable</p> <p>Description Represents an ID value that's populated by the system and refers to the position of the event in the event stream. Replay ID values aren't guaranteed to be contiguous for consecutive events. A subscriber can store a replay ID value and use it on resubscription to retrieve missed events that are within the retention window.</p>
RequestIdentifier	<p>Type string</p> <p>Properties Nillable</p> <p>Description The unique identifier of the request. This field is always empty.</p>

SequenceAssignedEvent

Represents the notification to customers about the assignment of a sequence to a target record. This process is initiated by the `/sequences/actions/assign` request. This object is available in API version 65.0 and later.

Supported Calls

`describeSObjects()`

Supported Subscribers

Subscriber	Supported?
Apex Triggers	✓
Flows	✓

Subscriber	Supported?
Processes	
Pub/Sub API	
Streaming API (CometD)	

Subscription Channel

/event/SequenceAssignedEvent

Event Delivery Allocation Enforced

No

Special Access Rules

This object is available when Billing and Sequential Numbering is enabled.

Fields

Field	Details
EventUuid	<p>Type string</p> <p>Properties Nillable</p> <p>Description A universally unique identifier (UUID) that identifies a platform event message.</p>
ReplayId	<p>Type string</p> <p>Properties Nillable</p> <p>Description Represents an ID value that's populated by the system and refers to the position of the event in the event stream. Replay ID values aren't guaranteed to be contiguous for consecutive events. A subscriber can store a replay ID value and use it on resubscription to retrieve missed events that are within the retention window.</p>
SequenceAssignmentDateTime	<p>Type dateTime</p> <p>Properties Nillable</p>

Field	Details
	Description The date and time when the sequence pattern value was assigned to the target record.
SequencePatternValue	Type string Properties Nillable Description The complete sequence value that's assigned to the target record.
SequencePolicyIdentifier	Type string Properties Nillable Description The ID of the sequence policy that's related to the event.
SequenceValue	Type string Properties Nillable Description The sequence value that's assigned to the target record.
TargetObjectName	Type string Properties Nillable Description The name of the object to which the sequence policy is applicable.
TargetRecordIdentifier	Type string Properties Nillable Description The ID of the target record to which the sequence policy is applied.

VoidInvoiceProcessedEvent

Represents the notification to the customers after the process started by the `/commerce/invoicing/invoices/{invoiceId}/actions/void` request is complete. The request attempts to void an invoice by crediting an invoice and changing its status to `Voided`, which prevents further changes. This object is available in API version 62.0 and later.

Supported Calls

`describeSObjects()`

Supported Subscribers

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

Subscription Channel

`/event/VoidInvoiceProcessedEvent`

Event Delivery Allocation Enforced

No

Special Access Rules

This object is available when Billing is enabled.

Fields

Field	Details
<code>CorrelationIdentifier</code>	<p>Type string</p> <p>Properties Nillable</p> <p>Description Reserved for future use.</p>

Field	Details
CrMemoProcessErrDtlEvents	<p>Type CrMemoProcessErrDtlEvent[]</p> <p>Properties Nillable</p> <p>Description A compilation of error messages and error codes for a failed request. See the <code>ErrorDetails</code> field for error messages and error codes.</p>
CreditMemoId	<p>Type reference</p> <p>Properties Nillable</p> <p>Description The ID of the credit memo created to void the invoice as the result of a successful request. This field is a relationship field.</p> <p>Relationship Name CreditMemo</p> <p>Refers To CreditMemo</p>
ErrorDetails	<p>Type string</p> <p>Properties Nillable</p> <p>Description If the request fails, this field shows error messages, error codes, and the ID of the record on which the errors occurred.</p>
EventUuid	<p>Type string</p> <p>Properties Nillable</p> <p>Description A universally unique identifier (UUID) that identifies a platform event message.</p>
InvoiceId	<p>Type reference</p> <p>Properties Nillable</p> <p>Description The invoice that was voided as the result of a successful request.</p>

Field	Details
	<p>This field is a relationship field.</p> <p>Relationship Name Invoice</p> <p>Refers To Invoice</p>
IsSuccess	<p>Type boolean</p> <p>Properties Defaulted on create</p> <p>Description Required. Indicates whether the request was successful (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
ReplayId	<p>Type string</p> <p>Properties Nillable</p> <p>Description Represents an ID value that's populated by the system and refers to the position of the event in the event stream. Replay ID values aren't guaranteed to be contiguous for consecutive events. A subscriber can store a replay ID value and use it on resubscription to retrieve missed events that are within the retention window.</p>
RequestIdentifier	<p>Type string</p> <p>Properties Nillable</p> <p>Description The unique ID returned in the <code>/commerce/billing/invoices/{invoiceId}/actions/voidresponse</code>. Use this ID to identify the event for a specific request.</p>

Billing Standard Invocable Actions

Use standard invocable actions to automate processes such as credit application, billing schedules creation, and invoice management.

Commerce Payments Invocable Actions

This table provides a list of the invocable actions of Commerce Payments, which can be used for Billing.

Resource	Description
/services/data/v65.0/actions/standard/applyPayment (POST)	Apply a payment record to an invoice header by creating a PaymentLineInvoice record with Applied type.
/services/data/v65.0/actions/standard/paymentSale (POST)	Capture a payment without any prior authorization, and create a payment record.

Billing provides these invocable actions.

[Apply Credit Action](#)

Apply a credit memo or credit memo line to an invoice or invoice line, respectively.

[Create Billing Schedules From Billing Transaction Action](#)

Create one or more billing schedules for a specified billing transaction ID.

[Create Standalone Billing Schedules Action](#)

Creates billing schedules for internal or external transaction records by calling the Create Standalone Billing Schedules API.

[Generate Invoice Documents Action](#)

Asynchronously generate PDF documents for the invoices associated with an invoice batch run record that are in the Draft or Posted status.

[Post Draft Credit Memo Action](#)

Post a draft credit memo to a credit memo record for review and approval.

[Post Draft Invoice Action](#)

Update the status of an invoice from Draft to Posted for a credit memo application.

[Post Draft Invoice Batch Run Action](#)

Update the status of a batch of invoices from Draft to Posted for a credit memo application.

[Recover Billing Schedules Action](#)

Recover one or more billing schedules in the Error or Processing status.

[Unapply Credit Action](#)

Unapply a credit memo or credit memo line from an invoice or invoice line, respectively.

[Unapply Payment Action](#)

Unapplies a payment that's already been applied to an invoice or invoice line by crediting the amount back to the payment and the invoice or invoice line.

[Write Off Invoices Action](#)

Write off partially paid or unpaid invoices to manage pending debts and to maintain accurate financial records. This action calls the Posted Invoice List Write-Off (POST) API.

SEE ALSO:

[Actions Developer Guide: Overview](#)

[REST API Developer Guide: Invocable Actions Standard](#)

Apply Credit Action

Apply a credit memo or credit memo line to an invoice or invoice line, respectively.

This action credits the amount of the credit memo or credit memo line to the corresponding invoice or invoice line, reducing both their balances.

This action is available in API version 62.0 and later.

Special Access Rules

The Apply Credit action is available in Enterprise, Developer, and Unlimited Editions where Billing is enabled. To use this action, you need the Credit Memo Operations User permission set.

Supported REST HTTP Methods

URI

`/services/data/v65.0/actions/standard/applyCredit`

Formats

JSON, XML

HTTP Methods

POST

Authentication

Authorization: Bearer *token*

Inputs

Input	Details
<code>appliedCreditAmount</code>	<p>Type double</p> <p>Description Required. Credit amount applied to an invoice or invoice line.</p>
<code>creditSourceRecordId</code>	<p>Type string</p> <p>Description Required. ID of the credit memo or credit memo line that's applied to an invoice or invoice line.</p>
<code>creditTargetRecordId</code>	<p>Type string</p> <p>Description Required.</p>

Input	Details
	ID of the invoice or invoice line record that the credit is applied to.
description	<p>Type string</p> <p>Description Additional details about the credit memo or credit memo line to be applied to an invoice or invoice line.</p>
effectiveDate	<p>Type string</p> <p>Description Date to use for applying the credit memo to an invoice or invoice line.</p>

Outputs

Output	Details
recordId	<p>Type string</p> <p>Description ID of the credit memo invoice application or credit memo line invoice line record of type Applied that the action created.</p>

Example

POST

This example shows a sample request for the Apply Credit action.

```
{
  "inputs": [
    {
      "appliedCreditAmount": 20,
      "creditTargetRecordId": "3ttDU00000000iZYAQ",
      "creditSourceRecordId": "50gDU000000007NYAQ",
      "description": "Applied credit memo to an invoice",
      "effectiveDate": "2024-08-27"
    }
  ]
}
```

This example shows a sample response for the Apply Credit action.

```
{
  "actionName": "applyCredit",
}
```

```

"errors": null,
"invocationId": null,
"isSuccess": true,
"outputValues": {
  "recordId": "4sFDU00000000652AA"
},
"sortOrder": -1,
"version": 1
}

```

Create Billing Schedules From Billing Transaction Action

Create one or more billing schedules for a specified billing transaction ID.

This action calls the [Create Billing Schedules for Orders \(POST\) API](#) to retrieve the billing transaction items associated with the billing transaction ID. The API generates the corresponding billing schedules for each of the billing transaction items for operations such as transaction modifications, renewals, cancellations, and new sales.

This action is available in API version 62.0 and later.

Special Access Rules

The Create Billing Schedules From Billing Transaction action is available in Enterprise, Unlimited, and Developer Editions where Billing is enabled. To use this action, you need the Create Billing Schedules From Billing Transactions API permission set.

Supported REST HTTP Methods

URI

`/services/data/v65.0/actions/standard/createBillingSchedulesFromBillingTransaction`

Formats

JSON, XML

HTTP Methods

POST

Authentication

Authorization: Bearer *token*

Inputs

Input	Details
billingTransactionId	<p>Type</p> <p>string</p> <p>Description</p> <p>Required.</p> <p>ID of the billing transaction record to create one or more billing schedules for.</p>

Outputs

Output	Details
requestId	<p>Type string</p> <p>Description Universally Unique Identifier (UUID) that's used to track the status of the asynchronous action.</p>
statusUrl	<p>Type string</p> <p>Description URL that's used to check the status of the API request.</p>

Example

POST

This example shows a sample request for the Create Billing Schedules From Billing Transaction action.

```
{
  "inputs": [
    {
      "billingTransactionId": "801xx000003JztvAAC"
    }
  ]
}
```

This example shows a sample response for the Create Billing Schedules From Billing Transaction action.

```
{
  "actionName": "createBillingSchedulesFromBillingTransaction",
  "errors": null,
  "isSuccess": true,
  "outputValues": {
    "requestId": "4sFDU00000000652AA",
    "statusUrl": "/services/data/v62.0/subjects/AsyncOperationTracker/16Pxx0000004NhAEAU"
  },
  "sortOrder": -1,
  "version": 1
}
```

SEE ALSO:

[Revenue Cloud Developer Guide: Context-Aware Billing Schedule API](#)

Create Standalone Billing Schedules Action

Creates billing schedules for internal or external transaction records by calling the Create Standalone Billing Schedules API.

This action is available in API version 64.0 and later.

See [Create Standalone Billing Schedules \(POST\) API](#) to know more about the mandatory and optional tags, sample transaction details, and sample payloads for various types of transactions.

Special Access Rules

This action is available in Enterprise, Unlimited, and Developer Editions with the Revenue Cloud Billing license. To use this action, you need the Billing Operations permission set.

Supported REST HTTP Methods

URI

`/services/data/v65.0/actions/standard/createBillingSchedulesFromTrxn`

Formats

JSON, XML

HTTP Methods

POST

Authentication

Authorization: Bearer *token*

Inputs

Input	Details
contextDefinitionName	<p>Type</p> <p>string</p> <p>Description</p> <p>Required.</p> <p>Name of the context definition that contains the mappings for the transaction record and billing schedules.</p>
readContextMappingName	<p>Type</p> <p>string</p> <p>Description</p> <p>Required.</p> <p>Name of the context mapping with the mapping for the transaction.</p>
saveContextMappingName	<p>Type</p> <p>string</p> <p>Description</p> <p>Required.</p>

Here's a sample response for the Create Billing Schedules From Transaction action.

```
{
  "actionName": "createBillingSchedulesFromTrxn",
  "errors": null,
  "isSuccess": true,
  "outputValues": {
    "requestId": "16PZ6000000CnKRMA0",
    "statusUrl": "/services/data/v64.0/subjects/AsyncOperationTracker/16PZ6000000CnKRMA0"
  },
  "sortOrder": -1,
  "version": 1
}
```

Generate Invoice Documents Action

Asynchronously generate PDF documents for the invoices associated with an invoice batch run record that are in the `Draft` or `Posted` status.

This action uses the ID of the invoice batch run record to find the draft or posted invoices from the batch and to generate the PDF documents for its invoices that are in the `Draft` or `Posted` status. This action creates a `DocGenerationBatchProcess` record that contains the Document Generation Process and Invoice Document records for each of the invoices. This action is available in API version 63.0 and later with Revenue Cloud Billing.

Special Access Rules

The Generate Invoice Documents action is available in Enterprise, Unlimited, and Developer Editions where Revenue Cloud Billing is enabled. The org must have Billing Docgen enabled and an active Invoice Document Template to generate PDF documents. To use this action, you need either the Billing Operations User or the Billing Admin permission set, along with the Docgen Designer and Docgen Designer Standard User permission sets.

Supported REST HTTP Methods

URI

`/services/data/v65.0/actions/standard/generateInvoiceDocuments`

Formats

JSON, XML

HTTP Methods

POST

Authentication

Authorization: Bearer *token*

Inputs

Input	Details
invoiceBatchRunId	Type string

Input	Details
	Description Required. ID of the invoice batch run record that created the draft or posted invoices.

Outputs

Output	Details
requestId	Type string Description An alphanumeric string to track the status of the document generation request.
requestStatus	Type boolean Description Indicates whether the operation is successful (<code>true</code>) or not (<code>false</code>).

Example

POST

This example shows a sample request for the Generate Invoice Documents action.

```
{
  "inputs": [
    {
      "invoiceBatchRunId": "5IRSG000001Az014AC"
    }
  ]
}
```

This example shows a sample response for the Generate Invoice Documents action.

```
{
  "actionName": "generateInvoiceDocuments",
  "errors": null,
  "isSuccess": true,
  "outputValues": {
    "requestId": "4sFDU00000000652AA",
    "requestStatus": true
  }
}
```

Post Draft Credit Memo Action

Post a draft credit memo to a credit memo record for review and approval.

This action is available in API version 65.0 and later.

Supported REST HTTP Methods

URI

`/services/data/v65.0/actions/standard/postDraftCreditMemo`

Formats

JSON, XML

HTTP Methods

POST

Authentication

Authorization: Bearer *token*

Inputs

Input	Details
<code>correlationId</code>	<p>Type</p> <p>string</p> <p>Description</p> <p>Splunk correlation ID to use to track messages that are related to the request and logged in Splunk by the different services involved in the request. If not specified, the service creates a random Universally Unique Identifier (UUID).</p>
<code>creditMemoId</code>	<p>Type</p> <p>string</p> <p>Description</p> <p>Required.</p> <p>ID of the credit memo record in <code>Draft</code> status to be posted.</p>

Outputs

Output	Details
<code>requestIdentifier</code>	<p>Type</p> <p>string</p> <p>Description</p> <p>The UUID that's used to track the status of the asynchronous action.</p>

Output	Details
statusUrl	<p>Type</p> <p>string</p> <p>Description</p> <p>The URL to use to check the status of the request.</p>

Example

POST

This example shows a sample request that contains the ID of the credit memo to be posted.

```
{
  "inputs": [
    {
      "creditMemoId": "50gDU0000001MdYAI"
    }
  ]
}
```

This example shows a sample successful response.

```
[
  {
    "actionName": "postDraftCreditMemo",
    "errors": [],
    "invocationId": null,
    "isSuccess": true,
    "outcome": null,
    "outputValues": {
      "statusUrl":
"/services/data/v65.0/subjects/AsyncOperationTracker/16PDU000000A4nw2AC",
      "requestIdentifier": "d3a9d9ce-2a83-4a08-bcf3-df0348a0008c"
    },
    "sortOrder": -1,
    "version": 1
  }
]
```

Post Draft Invoice Action

Update the status of an invoice from `Draft` to `Posted` for a credit memo application.

This action uses the ID of the draft invoice and triggers an asynchronous process to post the invoice. This action is available in API version 62.0 and later.

Special Access Rules

The Post Draft Invoice action is available in Enterprise, Unlimited, and Developer Editions where Billing is enabled. To use this action, you need the Billing Operations User permission set.

Supported REST HTTP Methods

URI

/services/data/v65.0/actions/standard/postDraftInvoice

Formats

JSON, XML

HTTP Methods

POST

Authentication

Authorization: Bearer **token**

Inputs

Input	Details
correlationId	<p>Type string</p> <p>Description Splunk correlation ID to track the messages that are related to the request and are logged in Splunk by the different services involved in the request. If the ID isn't specified, the service creates a random Universally Unique Identifier (UUID).</p>
invoiceId	<p>Type string</p> <p>Description Required. ID of the Draft invoice to be posted.</p>

Outputs

Output	Details
requestIdentifier	<p>Type string</p> <p>Description UUID that's used to track the status of the asynchronous action.</p>
statusUrl	<p>Type string</p> <p>Description URL that's used to check the status of the API request.</p>

Example

POST

This example shows a sample request for the Post Draft Invoice action.

```
{
  "inputs": [
    {
      "invoiceId": "3ttDU00000000izYAQ"
    }
  ]
}
```

This example shows a sample response for the Post Draft Invoice action.

```
{
  "actionName": "postDraftInvoice",
  "errors": null,
  "isSuccess": true,
  "outputValues": {
    "requestIdentifier": "4sFDU00000000652AA",
    "statusUrl": "/services/data/v62.0/subjects/AsyncOperationTracker/16Pxx0000004NhAEAU"
  }
}
```

Post Draft Invoice Batch Run Action

Update the status of a batch of invoices from `Draft` to `Posted` for a credit memo application.

This action uses the ID of the invoice batch run record to find draft invoices from the batch and to post the draft invoices to an invoice record. This action is available in API version 62.0 and later.

Special Access Rules

The Post Draft Invoice Batch Run action is available in Enterprise, Unlimited, and Developer Editions where Billing is enabled. To use this action, you need the Billing Operations User permission set.

Supported REST HTTP Methods

URI

```
/services/data/v65.0/actions/standard/postDraftInvoiceBatchRun
```

Formats

JSON, XML

HTTP Methods

POST

Authentication

Authorization: Bearer *token*

Inputs

Input	Details
invoiceBatchRunId	<p>Type string</p> <p>Description Required. ID of the invoice batch run record that created the draft invoices.</p>

Outputs

Output	Details
invBatchDraftToPostedRunId	<p>Type string</p> <p>Description ID of the record that's created to track the batch process of posting draft invoices. These draft invoices are associated with the parent invoice batch run record.</p>

Example

POST

This example shows a sample request for the Post Draft Invoice Batch Run action.

```
{
  "inputs": [
    {
      "invoiceBatchRunId": "5IRSG000001Az014AC"
    }
  ]
}
```

This example shows a sample response for the Post Draft Invoice Batch Run action.

```
{
  "actionName": "postDraftInvoiceBatchRun",
  "errors": null,
  "isSuccess": true,
  "outputValues": {
    "invBatchDraftToPostedRunId": "4sFDU00000000652AA"
  }
}
```

Recover Billing Schedules Action

Recover one or more billing schedules in the `Error` or `Processing` status.

This action uses the ID of the billing schedule record in the `Error` or `Processing` status to retrieve the latest generated invoice. This action also retrieves any other billing schedules in the `Error` or `Processing` status associated with that invoice.

This action is available in API version 62.0 and later.

Special Access Rules

The Recover Billing Schedules action is available in Enterprise, Unlimited, and Developer Editions where Billing is enabled. To use this action, you need the Manage Errors Using Invoice Error Recovery API permission set.

Supported REST HTTP Methods

URI

`/services/data/v65.0/actions/standard/recoverBillingSchedules`

Formats

JSON, XML

HTTP Methods

POST

Authentication

Authorization: Bearer *token*

Inputs

Input	Details
<code>billingScheduleId</code>	<p>Type string</p> <p>Description Required. ID of the billing schedule record in the <code>Error</code> or <code>Processing</code> status.</p>

Outputs

Output	Details
<code>successBillingScheduleIds</code>	<p>Type string</p> <p>Description Comma-separated list of IDs associated with the parent billing schedule record in the <code>Error</code> or <code>Processing</code> status.</p>

Example

POST

This example shows a sample request for the Recover Billing Schedules action.

```
{
  "inputs": [
    {
      "billingScheduleId": "801xx000003JztvAAC"
    }
  ]
}
```

This example shows a sample response for the Recover Billing Schedules action.

```
{
  "actionName": "recoverBillingSchedules",
  "errors": null,
  "isSuccess": true,
  "outputValues": {
    "successBillingScheduleIds": ["4sFDU00000000652AA", 16Pxx0000004NhAEAU]
  },
  "sortOrder": -1,
  "version": 1
}
```

Unapply Credit Action

Unapply a credit memo or credit memo line from an invoice or invoice line, respectively.

This action unapplies the credit from an invoice or invoice line. This process involves crediting the applied amount of the credit memo invoice application or credit memo line invoice line record to the related credit memo or credit memo line and invoice or invoice line.

This action is available in API version 62.0 and later.

Special Access Rules

The Apply Credit action is available in Enterprise, Developer, and Unlimited Editions where Billing is enabled. To use this action, you need the Credit Memo Operations User permission set.

Supported REST HTTP Methods

URI

/services/data/v**65.0**/actions/standard/unapplyCredit

Formats

JSON, XML

HTTP Methods

POST

Authentication

Authorization: Bearer *token*

Inputs

Input	Details
effectiveDate	<p>Type string</p> <p>Description Date when the credit is unapplied from an invoice or invoice line.</p>
description	<p>Type string</p> <p>Description Additional details about the credit memo invoice application or credit memo line invoice line record of type <code>Applied</code> that's processed.</p>
recordId	<p>Type string</p> <p>Description Required. ID of the credit memo invoice application or credit memo line invoice line record of type <code>Applied</code> that's processed to unapply the credit.</p>

Outputs

Output	Details
recordId	<p>Type string</p> <p>Description ID of the credit memo invoice application or credit memo line invoice line record of type <code>Unapplied</code> that the action created.</p>

Example

POST

This example shows a sample request for the Unapply Credit action.

```
{
  "inputs": [
    {
      "recordId": "4sFDU00000005g2AA",
      "description": "Unapplied credit memo from an invoice",
      "effectiveDate": "2024-08-27"
    }
  ]
}
```

```

    }
  ]
}

```

This example shows a sample response for the Unapply Credit action.

```

{
  "actionName": "unapplyCredit",
  "errors": null,
  "invocationId": null,
  "isSuccess": true,
  "outputValues": {
    "recordId": "4sFDU00000000602AA"
  },
  "sortOrder": -1,
  "version": 1
}

```

Unapply Payment Action

Unapplies a payment that's already been applied to an invoice or invoice line by crediting the amount back to the payment and the invoice or invoice line.

If the **Apply Payments to Invoices** setting is enabled, payments can be applied to invoices, which creates the `PaymentLineInvoice` records of type `Applied`. If the **Apply Payments to Invoices feature** setting is disabled, payments can be applied to invoice lines, which creates the `PaymentLineInvoiceLine` records of type `Applied`.

When payments are unapplied, the `PaymentLineInvoice` or `PaymentLineInvoiceLine` records of type `Applied` has the associated `PaymentLineInvoice` or `PaymentLineInvoiceLine` records of type `Unapplied`.

This action is available in API version 64.0 and later.

Special Access Rules

This action is available in Enterprise, Unlimited, and Developer Editions where Billing is enabled. To use this action, you need the `Payment Ops` permission set.

Supported REST HTTP Methods

URI

`/services/data/v65.0/actions/standard/unapplyPayment`

Formats

JSON, XML

HTTP Methods

POST

Authentication

Authorization: Bearer *token*

Inputs

Input	Details
description	<p>Type</p> <p>string</p> <p>Description</p> <p>Additional details about the payment line invoice or payment line invoice line that's processed to unapply the payment.</p>
effectiveDateTime	<p>Type</p> <p>datetime</p> <p>Description</p> <p>Date and time to use for unapplying the payment from an invoice or invoice line.</p>
recordId	<p>Type</p> <p>id</p> <p>Description</p> <p>Required</p> <p>ID of the payment line invoice or payment line invoice line record of type <code>Applied</code> that's processed to unapply the payment.</p>

Outputs

Output	Details
recordId	<p>Type</p> <p>id</p> <p>Description</p> <p>ID of the payment line invoice or payment line invoice line record of type <code>Unapplied</code> that the action created.</p>
unappliedDateTime	<p>Type</p> <p>datetime</p> <p>Description</p> <p>Date and time when the payment was unapplied.</p>

Example

POST

This sample request is for the Unapply Payment action.

```
{
  "inputs": [
    {
      "description": "Unapply payment",
      "effectiveDateTime": "2024-08-11T07:53:15.000Z",
      "recordId": "1PLR000000000dDOAQ"
    }
  ]
}
```

This sample response is for the Unapply Payment action.

```
{
  "actionName": "unapplyPayment",
  "errors": null,
  "isSuccess": true,
  "outputValues": {
    "recordId": "1PLR000000000dDOAQ",
    "unappliedDateTime": "2024-08-11T08:09:01.000Z"
  },
  "sortOrder": -1,
  "version": 1
}
```

Write Off Invoices Action

Write off partially paid or unpaid invoices to manage pending debts and to maintain accurate financial records. This action calls the Posted Invoice List Write-Off (POST) API.

This action is available in API version 64.0 and later.

Special Access Rules

The Write Off Invoices action is available in Enterprise, Developer, and Unlimited Editions where Billing is enabled. To use this action, you need the Billing Operations User and Credit Memo Operations User permission sets.

Supported REST HTTP Methods

URI

```
/services/data/v65.0/actions/standard/writeOffInvoices
```

Formats

JSON, XML

HTTP Methods

GET

Authentication

Authorization: Bearer **token**

Notes

You can also call the associated Connect REST API endpoint or InvoiceWriteOff Apex methods. See [Posted Invoice List Write-Off \(POST\) API](#) or [InvoiceWriteOff Namespace](#).

Inputs

Input	Details
writeOffInvoiceInputList	<p>Type</p> <p>Apex-defined</p> <p>Description</p> <p>Required. A collection of Apex input records that contain details about the invoices to be written off. See InvoiceWriteOff Namespace for the list of input parameters.</p>

Outputs

Output	Details
writeOffInvoiceResponseList	<p>Type</p> <p>Apex-defined</p> <p>Description</p> <p>A collection of Apex output records that contain details about the invoices that were written off. See InvoiceWriteOff Namespace for the list of output parameters.</p>

Example**GET**

This sample request is for the Write Off Invoices action.

```
{
  "inputs": [
    {
      "apexClass": "InvoiceWriteOff__WriteOffInvoiceInputList",
      "bytelength": 0,
      "configuration": false,
      "defaultValue": null,
      "description": "A collection of Apex WriteOffInvoiceInputList records that contain details about the invoices to be written-off.",
      "label": "WriteOffInvoiceInputList",
      "maxOccurs": 1,
      "name": "writeOffInvoiceInputList",
      "picklistValues": null,
      "placeholderText": null,
      "required": true,
      "sObjectType": null,
      "setupReferenceType": null,
    }
  ]
}
```

```

    "toolingType": null,
    "type": null
  }
]
}

```

This sample response is for the Write Off Invoices action.

```

{
  "outputs": [
    {
      "additionalAttributes": null,
      "apexClass": "InvoiceWriteOff__WriteOffInvoiceResponseList",
      "description": "A collection Apex WriteOffInvoiceResponseList records that contain details about the invoices that were written off.",
      "label": "WriteOffInvoiceResponseList",
      "maxOccurs": 1,
      "name": "writeOffInvoiceResponseList",
      "picklistValues": null,
      "subjectType": null,
      "type": null
    }
  ]
}

```

Billing Business APIs

Use the Billing Business APIs to manage credit application and to handle billing scenarios.

These sections list the available resources.

Credits

Resource	Description
/commerce/invoicing/credit-memos/creditMemoId/actions/apply (POST)	Adjust or correct already issued invoices by applying an existing credit memo to an invoice.
/commerce/invoicing/credit-memo-inv-applications/creditMemoInvApplicationId/actions/unapply (POST)	Unapply a credit memo from an invoice and return the invoice and the credit memo to their pre-application states.
/commerce/invoicing/credit-memo-lines/creditMemoLineId/actions/apply (POST)	Adjust or correct already issued invoices by applying an existing credit memo line to an invoice line.
/commerce/invoicing/credit-memo-line-invoice-line/creditMemoLineInvoiceLineId/actions/unapply (POST)	Unapply a credit memo line from an invoice line and return the invoice line and the credit

Resource	Description
	memo line to their pre-application states.
/commerce/invoicing/credit-memos/actions/generate (POST)	Create a credit memo without applying it to an invoice. You can credit the invoice at a later date.
/commerce/invoicing/invoices/<i>invoiceId</i>/actions/void (POST)	Void a posted invoice to rebill the customer, if necessary.
/commerce/invoicing/invoices/<i>invoiceId</i>/actions/convert-to-credit on page 1874 (POST)	Convert a list of invoice lines with a negative amount into a posted credit memo. This conversion is applicable for a single invoice at a time.
/commerce/invoicing/invoices/<i>invoiceId</i>/actions/credit on page 1851 (POST)	Create a credit memo and apply it to an invoice. The credit memo can fully or partially credit the invoice.
/commerce/invoicing/credit/collection/actions/post on page 1879 (POST)	Post a draft credit memo to a credit memo record for review and approval.

Billing Schedules

Resource	Description
/commerce/invoicing/billing-schedules/actions/create (POST)	Generate billing schedules for orders by using context service.
/commerce/invoicing/standalone/billing-schedules/actions/create (POST)	Generate billing schedules from any internal or external transaction by using context service.
/commerce/invoicing/billing-schedules/collection/actions/recover (POST)	Recover the latest generated invoice associated with the billing schedules in the <code>Error</code> or <code>Processing</code> status.
/commerce/invoicing/actions/suspend-billing (POST)	Suspend billing for billing schedule groups or an account for a predefined period.
/commerce/invoicing/actions/resume-billing (POST)	Resume billing for billing schedule groups or an account that's currently on hold.

Invoices

Resource	Description
/commerce/invoicing/invoices/collection/actions/post (POST)	Update the status of the invoice from Draft to Posted.
/commerce/invoicing/invoice-batch-runs/<i>invoiceBatchRunId</i>/actions/draft-to-posted (POST)	Update a batch of invoices from Draft to Posted status for a credit memo application.
/commerce/invoicing/invoices/collection/actions/preview (POST)	Generate preview invoices, which includes the estimated tax amounts, for a billing transaction for the next two billing periods.
/commerce/invoicing/invoices/collection/actions/ingest (POST)	Ingest or generate an invoice from an internal or external billing transaction data.
/commerce/billing/invoices/invoice-batch-docgen/<i>invoiceBatchRunId</i>/actions/<i>actionName</i> (POST)	Asynchronously generate PDF documents for the invoices that are in the Draft or Posted status and are associated with an invoice batch run record.
/commerce/billing/invoices/invoice-batch-docgen/<i>invoiceBatchRunId</i>/actions/<i>actionName</i> (POST)	Asynchronously regenerate PDF documents for the invoices that are in the Draft or Posted status and failed in an earlier invoice batch run.
/commerce/invoicing/invoices/actions/write-off (POST)	Create credit memos with the total charge amount on the invoice as the write-off amount and close the invoice.
/commerce/invoicing/invoice-batch-runs/actions/send-email (POST)	Send emails for the posted invoices of a specified invoice batch run ID.
/commerce/invoicing/invoices/collection/actions/generate (POST)	Create an invoice for an account, order, or a list of billing schedules.

Invoice Scheduler

Resource	Description
/commerce/invoicing/invoice-schedulers (POST)	Create or update an invoice scheduler to automatically generate invoices. Use the criteria and filters of the invoice scheduler to set up the invoice run schedules based on your requirements.
/commerce/invoicing/invoice-batch-runs/invoiceBatchRunId/actions/recover (POST)	Recover records associated with a failed invoice run. Recovery is required only when billing schedules remain in the Processing, Void In Progress, or Error status.

Invoice Sequencing

Resource	Description
/connect/sequences/policy (POST)	Create a sequence policy to configure a unique, sequential number for all posted invoices.
/connect/sequences/policy/sequencePolicyId (PATCH)	Update the settings of a sequence policy that defines how unique, sequential numbers are generated by using specific patterns, values, and filters.
/connect/sequences/actions/assign (POST)	Assign sequence pattern values to objects based on the configured sequence policy.
/connect/sequences/gap-reconciliation (POST)	Restore a missing sequence value identified by using this API in gapless-enabled sequences. This sequence value can be used later in the subsequent sequence policy numbering, ensuring there are no gaps.

Payments

Resource	Description
/commerce/billing/payments/paymentId/actions/apply (POST)	Allocate the balance of a payment to reduce the balance of an invoice. The response includes an ID of the payment line invoice or payment line invoice line that represents the payment balance allocated against the invoice.
/commerce/billing/payments/paymentId/paymentlines/paymentLineId/actions/unapply (POST)	Revert the application of a payment line from an invoice, and return the payment and invoices to their preapplication state. Use this API to correct an input during the payment application process.
/commerce/billing/refunds/refundId/actions/apply (POST)	Make a refund transaction against a payment.

Tax Calculation

Resource	Description
/commerce/taxes/actions/calculate (POST)	Calculate tax for a transaction.
/commerce/invoicing/invoices/collection/actions/calculate-estimated-tax (POST)	Calculate estimated tax for invoices with invoice lines that have the <code>TaxProcessingStatus</code> as either <code>Pending</code> or <code>Estimated</code> .

Salesforce Commerce Payments API

Resource	Description
/commerce/payments/payment-methods (POST)	Tokenize a payment method.
/commerce/payments/sales (POST)	Make a payment sale.
/commerce/payments/payments/paymentId/refunds (POST)	Create a refund for a payment.
/commerce/payments/authorizations (POST)	Authorize a payment.

Resource	Description
/commerce/payments/authorizations/authorizationId/reversals (POST)	Reverse an authorized payment.
/commerce/payments/authorizations/authorizationId/captures (POST)	Capture an authorized payment.

[Billing Business API Limits](#)

Learn about the default limits on the usage of the Billing business APIs.

[Resources](#)

Learn more about the available Billing API resources.

[Request Bodies](#)

Learn more about the available request bodies of Billing APIs.

[Response Bodies](#)

Learn more about the available response bodies of Billing APIs.

SEE ALSO:

[Connect REST API Developer Guide: Introduction](#)

Billing Business API Limits

Learn about the default limits on the usage of the Billing business APIs.

Refer to these default API limits and applicable recommendations to scale beyond these default limits.

Limit	Value	Scale Recommendations
The number of billing schedules that can be processed by the Create Invoices By Using Billing Schedules API .	200	Use Invoice Scheduler to scale up to 2000 invoice lines. See Invoice Scheduler or Batch Invoice Scheduler (POST) API .
The number of invoice lines that can be generated by the Create Invoices By Using Billing Schedules API .	200	Use Invoice Scheduler to scale up to 2000 invoice lines. See Invoice Scheduler or Batch Invoice Scheduler (POST) API .
The number of billing schedules that can be processed by the Recover Billing Schedule List API .	200	Use this API to follow the default API limits.
The number of invoices that can be processed by the Apply Credit Memos API .	300	Use this API recursively to apply left-over credits after 300 invoice lines.

EDITIONS

Available in: Lightning Experience

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

Limit	Value	Scale Recommendations
The number of invoice lines that can be processed by the Apply Credit Memo Lines API .	300	Use this API iteratively for every 300 invoice lines to support more than 300 invoice lines.
The number of invoices that can be processed by the Create and Apply Credit Memos API .	300	Use this API to follow the default API limits. The limits include the count for both charge and tax lines.
The number of credit memo lines of type Charge that can be created by the Create a Standalone Credit Memo API .	300	Use this API to follow the default API limits. The limits include the count for both charge and tax lines.
The number of invoice lines that can be processed by the Convert Negative Invoice Lines to Credits API , which excludes the number of associated invoice line taxes.	300	Use this API to follow the default API limits. The limits include the count for invoice charge lines only.
The number of billing transaction items that can be processed by the Create Billing Schedules for Orders API .	1000	This API supports creation of 1000 order lines as billing schedules.
The number of reference IDs that can be processed by the Suspend Billing API and the Resume Billing API .	200	Use this API to follow the default API limits.
The number of invoice lines that's supported by the Invoice Draft to Posted Status API .	200	Use this API to follow the default API limits.
The number of records that can be processed by the Invoice Ingestion API .	500	Use this API to follow the default API limits. The limits include the count for all invoices, invoice lines, taxes, and address group records.
The number of invoice lines or billing schedules that can be processed by the Invoice Preview API .	200	Use this API to follow the default API limits.
The number of invoice lines that can be processed by the Void a Posted Invoice API .	2000	Use this API to follow the default API limits.
The number of invoices that can be processed by the Posted Invoice List Write-Off API .	300	Use this API to follow the default API limits.
The number of invoice lines that can be generated on an invoice by the Batch Invoice Scheduler (POST) API . The number of records that can be recovered from a failed invoice run by the Batch Invoice Run Recovery (POST) API .	2000	Use this API to support the creation or recovery of up to 2,000 invoice lines on a single invoice.

Limit	Value	Scale Recommendations
The number of invoice lines that's supported by the Batch Invoices Draft to Posted Status (POST) API .	2000	Use this API to support 2000 invoice lines with no limit on the number of supported invoices.
The number of invoices that's supported by the Tax Calculation API .	1	Use this API to follow the default API limits.
The number of invoice lines that's supported by the Tax Calculation API .	500	The request can include 500 invoice lines. To avoid limit-related issues, test your TaxEngineAdapter Apex interface's implementation to make sure that it adheres to the Apex limit for total heap size .
The number of invoice lines that's supported by the Tax Calculation API interface when used with the Invoice Creation API .	200	The request can include 200 invoice lines. To avoid limit-related issues, test your TaxEngineAdapter Apex interface's implementation to make sure that it adheres to the Apex limit for total heap size .
The number of invoice lines that's supported by the Tax Calculation API interface when used with the Invoice Batch Run API .	2000	The request can include 2000 invoice lines. To avoid limit-related issues, test your TaxEngineAdapter Apex interface's implementation to make sure that it adheres to the Apex limit for total heap size .
The number of records that's supported by the Payment Line Apply API .	1	Payment supports application for either an Invoice or InvoiceLine record based on the settlement-level preferences.
The number of records that's supported by the Payment Line Unapply API .	1	Payment supports unapplication for either a PaymentLineInvoice or PaymentLineInvoiceLine record based on the settlement-level preferences.

Resources

Learn more about the available Billing API resources.

[Sequence Gap Reconciliation \(POST\)](#)

Restore a missing sequence value identified by using this API in gapless-enabled sequences. This sequence value can be used later in the subsequent sequence policy numbering, ensuring there are no gaps.

[Sequence Assignment \(POST\)](#)

Assign sequence pattern values to objects based on the configured sequence policy.

[Batch Invoices Document Generation \(POST\)](#)

Asynchronously generate PDF documents for the invoices that are in the `Draft` or `Posted` status and are associated with an invoice batch run record.

[Batch Invoices Document Generation Retry \(POST\)](#)

Asynchronously regenerate PDF documents for the invoices that are in the `Draft` or `Posted` status and failed in an earlier invoice batch run.

[Batch Invoices Draft to Posted Status \(POST\)](#)

Update a batch of invoices from `Draft` to `Posted` status for a credit memo application.

[Batch Invoice Scheduler \(POST, PUT\)](#)

Create or update an invoice scheduler to automatically generate invoices. Use the criteria and filters of the invoice scheduler to set up the invoice run schedules based on your requirements.

[Batch Payment Scheduler \(POST\)](#)

Create a payment scheduler to automate and process payment runs on a recurring basis.

[Billing Schedule Recovery List \(POST\)](#)

Recover the latest generated invoice associated with the billing schedules in the `Error` or `Processing` status.

[Create Billing Schedules for Orders \(POST\)](#)

Generate billing schedules for orders by using context service.

[Create a Sequence Policy \(POST\)](#)

Create a sequence policy to configure a unique, sequential number for all posted invoices.

[Create Standalone Billing Schedules \(POST\)](#)

Generate billing schedules from any internal or external transaction by using context service.

[Credit Memo Create and Apply \(POST\)](#)

Create a credit memo and apply it to an invoice. The credit memo can fully or partially credit the invoice.

[Credit Memo Apply List \(POST\)](#)

Adjust or correct already issued invoices by applying an existing credit memo to an invoice.

[Credit Memo Unapply \(POST\)](#)

Unapply a credit memo from an invoice and return the invoice and the credit memo to their pre-application states.

[Credit Memo Line Apply \(POST\)](#)

Adjust or correct already issued invoices by applying an existing credit memo line to an invoice line.

[Credit Memo Line Unapply \(POST\)](#)

Unapply a credit memo line from an invoice line and return the invoice line and the credit memo line to their pre-application states.

[Invoice Creation \(POST\)](#)

Create an invoice for an account, order, or a list of billing schedules.

[Invoice Draft to Posted Status \(POST\)](#)

Update the status of the invoice from `Draft` to `Posted`.

[Invoice Ingestion \(POST\)](#)

Ingest or generate an invoice from an internal or external billing transaction data.

[Invoice Estimated Tax Calculation \(POST\)](#)

Calculate estimated tax for invoices with invoice lines that have the `TaxProcessingStatus` as either `Pending` or `Estimated`.

[Invoice Preview \(POST\)](#)

Generate preview invoices, which includes the estimated tax amounts, for a billing transaction for the next two billing periods.

[Invoice Run Recovery \(POST\)](#)

Recover records associated with a failed invoice run. Recovery is required only when billing schedules remain in the `Processing`, `Void In Progress`, or `Error` status.

[Negative Invoice Lines to Credit Conversion \(POST\)](#)

Convert a list of invoice lines with a negative amount into a posted credit memo. This conversion is applicable for a single invoice at a time.

[Payment Line Apply \(POST\)](#)

Allocate the balance of a payment to reduce the balance of an invoice. The response includes an ID of the payment line invoice or payment line invoice line that represents the payment balance allocated against the invoice.

[Payment Line Unapply \(POST\)](#)

Revert the application of a payment line from an invoice, and return the payment and invoices to their preapplication state. Use this API to correct an input during the payment application process.

[Payment Scheduler Update \(PATCH\)](#)

Activate or deactivate a payment scheduler. You can set the status of a payment scheduler to `Active`, `Canceled`, `Draft`, or `Inactive`.

[Post a Draft Memo \(POST\)](#)

Post a draft credit memo to a credit memo record for review and approval.

[Posted Invoice List Write-Off \(POST\)](#)

Create credit memos with the total charge amount on the invoice as the write-off amount and close the invoice.

[Void a Posted Invoice \(POST\)](#)

Void a posted invoice to rebill the customer, if necessary.

[Refund Line Apply \(POST\)](#)

Make a refund transaction against a payment.

[Send Emails for Posted Invoices \(POST\)](#)

Send emails for the posted invoices of a specified invoice batch run ID.

[Resume Billing \(POST\)](#)

Resume billing for billing schedule groups or an account that's currently on hold.

[Suspend Billing \(POST\)](#)

Suspend billing for billing schedule groups or an account for a predefined period.

[Standalone Credit Memo \(POST\)](#)

Create a credit memo without applying it to an invoice. You can credit the invoice at a later date.

[Tax Calculation \(POST\)](#)

Calculate tax for a transaction.

[Update Sequence Policy \(PATCH\)](#)

Update the settings of a sequence policy that defines how unique, sequential numbers are generated by using specific patterns, values, and filters.

Sequence Gap Reconciliation (POST)

Restore a missing sequence value identified by using this API in gapless-enabled sequences. This sequence value can be used later in the subsequent sequence policy numbering, ensuring there are no gaps.

Special Access Rules

You need the Billing Admin permission set to use this API.

Resource

```
/connect/sequences/gap-reconciliation
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/sequences/gap-reconciliation
```

Available version

65.0

HTTP methods

POST

Request body for POST

JSON example

This example shows a sample request that specifies the list of sequence policies for gap reconciliation.

```
{
  "sequencePolicyIds": [
    "1vdx0000000abc",
    "1vdx0000000def"
  ]
}
```

This example shows a sample request that specifies the target invoice object for gap reconciliation.

```
{
  "targetObjects": [
    "Invoice"
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
sequencePolicyIds	String[]	List of IDs of the sequence policies.	Required if the targetObjects property isn't specified. You must not specify both properties.	65.0
targetObjects	String[]	List of objects to which the policies are applied.	Required if the sequencePolicyIds property isn't specified. You must not specify both properties.	65.0

Response body for POST[Sequence Gap Reconciliation](#)**Sequence Assignment (POST)**

Assign sequence pattern values to objects based on the configured sequence policy.

Special Access Rules

You need the Billing Admin permission set to use this API.

Resource

```
/connect/sequences/actions/assign
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/sequences/actions/assign
```

Available version

65.0

HTTP methods

POST

Request body for POST**JSON example**

```
{
  "targetObjectIds": [
    "3ttxx00000005nhAAA",
    "3ttxx00000006bhAAA"
  ],
  "sequencePolicyId": "1Vdxx0000004CFU"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
sequencePolicyId	String	ID of the sequence policy.	Optional	65.0
shouldPublishPlatformEvent	Boolean	Indicates whether to publish a platform event when a sequence is assigned to a target record (<code>true</code>) or not (<code>false</code>).	Optional	65.0
targetObjectIds	String[]	List of records to which the sequence pattern values are assigned.	Required	65.0

Response body for POST[Sequences Assignment](#)

Batch Invoices Document Generation (POST)

Asynchronously generate PDF documents for the invoices that are in the `Draft` or `Posted` status and are associated with an invoice batch run record.

Special Access Rules

This API is available with Revenue Cloud Billing. To use this API, enable Document Generation for Billing. Additionally, you need either the Billing Operations User permission set or the Billing Admin permission set, along with the Docgen Designer permission set and Docgen Designer Standard User permission set.

Resource

```
/commerce/billing/invoices/invoice-batch-docgen/invoiceBatchRunId/actions/actionName
```

- The `invoiceBatchRunId` parameter is the ID of the invoice batch run record that created the `Draft` or `Posted` invoices.
- The `actionName` parameter is the name of the action you want to perform on the specified invoice batch run record.

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/commerce/billing/invoices/invoice-batch-docgen/5Kps00250633m2W/actions/run
```

Available version

63.0

HTTP methods

POST

Response body for POST

[Batch Invoice Document Generation](#)

Batch Invoices Document Generation Retry (POST)

Asynchronously regenerate PDF documents for the invoices that are in the `Draft` or `Posted` status and failed in an earlier invoice batch run.

Special Access Rules

This API is available with Revenue Cloud Billing. To use this API, enable Document Generation for Billing. Additionally, you need either the Billing Operations User permission set or the Billing Admin permission set, along with the Docgen Designer permission set and Docgen Designer Standard User permission set.

Resource

```
/commerce/billing/invoices/invoice-batch-docgen/invoiceBatchRunId/actions/actionName
```

- The `invoiceBatchRunId` parameter is the ID of the invoice batch run record that created the `Draft` or `Posted` invoices.
- The `actionName` parameter is the name of the action you want to perform on the specified invoice batch run record. In this case, the action is to retry generating the `Draft` or `Posted` invoices that failed earlier.

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/commerce/billing/invoices/invoice-batch-docgen/5TRed000004G3mGM/actions/retry
```

Available version

63.0

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/commerce/invoicing/invoice-schedulers
```

```
https://yourInstance.salesforce.com/services/data/v65.0/commerce/invoicing/invoice-schedulers/5BSxx0000004TwGCAU
```

Available version

62.0

HTTP methods

POST, PUT

PUT is supported in version 63.0 and later for invoice schedulers with Draft or Inactive status.

Request body for POST**JSON example**

This example shows a sample request to create an invoice scheduler that generates invoices once.

```
{
  "schedulerName": "InvoiceScheduler",
  "startDate": "2024-05-06",
  "invoiceStatus": "POSTED",
  "preferredTime": "00:45",
  "targetDate": "2024-05-22",
  "invoiceDate": "2024-05-22",
  "frequencyCadence": "Once",
  "frequencyCadenceOptions": {},
  "timezone": "Asia/Kolkata",
  "status": "Active",
  "filterCriteria": [
    {
      "operation": "InList",
      "value": "Batch 2,Batch 3,Batch 4",
      "criteriaSequence": 1,
      "objectName": "BillingSchedule",
      "fieldName": "InvoiceRunMatchingValue"
    },
    {
      "operation": "Equals",
      "value": "001xx000003GZG5AAO",
      "criteriaSequence": 2,
      "objectName": "BillingSchedule",
      "fieldName": "BillingAccount"
    },
    {
      "operation": "Equals",
      "value": "0fwxx0000000001AAA",
      "criteriaSequence": 3,
      "objectName": "BillingScheduleGroup",
      "fieldName": "LegalEntity"
    },
    {
      "operation": "InList",
      "value": "OneTime,Recurring",
      "criteriaSequence": 4,
      "objectName": "BillingSchedule",

```



```

    "fieldName": "BillingTermUnit"
  },
  {
    "operation": "Equals",
    "value": "USD",
    "criteriaSequence": 5,
    "objectName": "BillingSchedule",
    "fieldName": "Currency_Iso_code"
  }
]
}

```

This example shows a sample request to create an invoice scheduler that generates invoices daily.

```

{
  "schedulerName": "InvoiceScheduler",
  "startDate": "2024-05-06",
  "endDate": "2026-05-06",
  "invoiceStatus": "POSTED",
  "preferredTime": "00:45",
  "targetDateOffset": 0,
  "invoiceDateOffset": 0,
  "isInvoiceDateFromRunDate": true,
  "frequencyCadence": "Daily",
  "frequencyCadenceOptions": {},
  "timezone": "Asia/Kolkata",
  "status": "Active",
  "filterCriteria": [
    {
      "operation": "InList",
      "value": "Batch 2,Batch 3,Batch 4",
      "criteriaSequence": 1,
      "objectName": "BillingSchedule",
      "fieldName": "InvoiceRunMatchingValue"
    },
    {
      "operation": "Equals",
      "value": "001xx000003GZG5AAO",
      "criteriaSequence": 2,
      "objectName": "BillingSchedule",
      "fieldName": "BillingAccount"
    },
    {
      "operation": "Equals",
      "value": "0fwxx0000000001AAA",
      "criteriaSequence": 3,
      "objectName": "BillingScheduleGroup",
      "fieldName": "LegalEntity"
    },
    {
      "operation": "InList",
      "value": "OneTime,Recurring",
      "criteriaSequence": 4,
      "objectName": "BillingSchedule",
      "fieldName": "BillingTermUnit"
    }
  ]
}

```

```

    },
    {
      "operation": "InList",
      "value": "USD",
      "criteriaSequence": 5,
      "objectName": "BillingSchedule",
      "fieldName": "Currency_Iso_code"
    }
  ]
}

```

This example shows a sample request to create an invoice scheduler that generates invoices weekly.

```

{
  "schedulerName": "InvoiceScheduler",
  "startDate": "2024-05-06",
  "endDate": "2026-05-06",
  "invoiceStatus": "POSTED",
  "preferredTime": "00:45",
  "targetDateOffset": 0,
  "invoiceDateOffset": 0,
  "isInvoiceDateFromRunDate": false,
  "frequencyCadence": "Weekly",
  "frequencyCadenceOptions": {
    "recursOnDay": "Sunday"
  },
  "timezone": "Asia/Kolkata",
  "status": "Active",
  "filterCriteria": [
    {
      "operation": "InList",
      "value": "Batch 2,Batch 3,Batch 4",
      "criteriaSequence": 1,
      "objectName": "BillingSchedule",
      "fieldName": "InvoiceRunMatchingValue"
    },
    {
      "operation": "Equals",
      "value": "001xx000003GZG5AAO",
      "criteriaSequence": 2,
      "objectName": "BillingSchedule",
      "fieldName": "BillingAccount"
    },
    {
      "operation": "Equals",
      "value": "0fwxx0000000001AAA",
      "criteriaSequence": 3,
      "objectName": "BillingScheduleGroup",
      "fieldName": "LegalEntity"
    },
    {
      "operation": "InList",
      "value": "OneTime,Recurring",
      "criteriaSequence": 4,
      "objectName": "BillingSchedule",

```

```

    "fieldName": "BillingTermUnit"
  },
  {
    "operation": "Equals",
    "value": "USD",
    "criteriaSequence": 5,
    "objectName": "BillingSchedule",
    "fieldName": "Currency_Iso_code"
  }
]
}

```

This example shows a sample request to create an invoice scheduler that generates invoices monthly on a specific date.

```

{
  "schedulerName": "InvoiceScheduler",
  "startDate": "2024-05-06",
  "endDate": "2026-05-06",
  "invoiceStatus": "POSTED",
  "preferredTime": "00:45",
  "targetDateOffset": 0,
  "invoiceDateOffset": 0,
  "isInvoiceDateFromRunDate": false,
  "frequencyCadence": "Monthly",
  "frequencyCadenceOptions": {
    "recurringSubType": "SpecificDate",
    "recursOnDate": "L-1",
    "shouldExcludeWkendAndHldy": true
  },
  "timezone": "Asia/Kolkata",
  "status": "Active",
  "filterCriteria": [
    {
      "operation": "InList",
      "value": "Batch 2,Batch 3,Batch 4",
      "criteriaSequence": 1,
      "objectName": "BillingSchedule",
      "fieldName": "InvoiceRunMatchingValue"
    },
    {
      "operation": "Equals",
      "value": "001xx000003GZG5AAO",
      "criteriaSequence": 2,
      "objectName": "BillingSchedule",
      "fieldName": "BillingAccount"
    },
    {
      "operation": "Equals",
      "value": "0fwxx0000000001AAA",
      "criteriaSequence": 3,
      "objectName": "BillingScheduleGroup",
      "fieldName": "LegalEntity"
    },
    {
      "operation": "InList",

```

```

    "value": "OneTime,Recurring",
    "criteriaSequence": 4,
    "objectName": "BillingSchedule",
    "fieldName": "BillingTermUnit"
  },
  {
    "operation": "Equals",
    "value": "USD",
    "criteriaSequence": 5,
    "objectName": "BillingSchedule",
    "fieldName": "Currency_Iso_code"
  }
]
}

```

This example shows a sample request to create an invoice scheduler that runs immediately.

```

{
  "schedulerName": "InvoiceScheduler",
  "status": "Draft",
  "invoiceStatus": "Posted",
  "frequencyCadenceOptions": {
    "shouldStartRunImmediately": true
  },
  "frequencyCadence": "Once",
  "targetDate": "2024-08-28",
  "invoiceDate": "2024-08-28",
  "filterCriteria": [
    {
      "operation": "InList",
      "value": "Batch 2,Batch 3,Batch 4",
      "criteriaSequence": 1,
      "objectName": "BillingSchedule",
      "fieldName": "InvoiceRunMatchingValue"
    },
    {
      "operation": "Equals",
      "value": "001xx000003GZG5AAO",
      "criteriaSequence": 2,
      "objectName": "BillingSchedule",
      "fieldName": "BillingAccount"
    },
    {
      "operation": "Equals",
      "value": "0fwxx0000000001AAA",
      "criteriaSequence": 3,
      "objectName": "BillingScheduleGroup",
      "fieldName": "LegalEntity"
    },
    {
      "operation": "InList",
      "value": "OneTime,Recurring",
      "criteriaSequence": 4,
      "objectName": "BillingSchedule",
      "fieldName": "BillingTermUnit"
    }
  ]
}

```

```

    },
    {
      "operation": "Equals",
      "value": "USD",
      "criteriaSequence": 5,
      "objectName": "BillingSchedule",
      "fieldName": "Currency_Iso_code"
    }
  ]
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
endDate	String	End date of the invoice scheduler.	Optional	63.0
filter Criteria	Batch Invoice Filter Criteria Input[]	List of line items of the filter criteria.	Optional	62.0
frequency Cadence	String	Frequency to run the invoice scheduler. Valid values are: <ul style="list-style-type: none"> • Once • Daily • Weekly • Monthly 	Required	62.0
frequency Cadence Options	Frequency Cadence Options	Frequency cadence options for the invoice scheduler.	Required	62.0
invoiceDate	String	Date shown on the invoice. This date is also used for tax calculations.	Required if the <code>frequency Cadence</code> property is set to <code>Once</code> .	62.0
invoiceDate Offset	Integer	Offset applied to the target date, which is the number of days added to or subtracted from the invoice date, to calculate the updated invoice date.	Required if the <code>frequency Cadence</code> property is set to <code>Daily</code> , <code>Weekly</code> , or <code>Monthly</code> .	62.0
invoice Status	String	Status of the invoice that specifies the expected invoice status from an invoice batch run. Valid values are: <ul style="list-style-type: none"> • Draft • Posted 	Required	62.0

Name	Type	Description	Required or Optional	Available Version
isInvoiceDateFromRunDate	Boolean	Indicates whether the invoice date is applicable from the date when the invoice scheduler is run (<code>true</code>) or not (<code>false</code>).	Optional	63.0
preferredTime	String	Preferred time for the invoice batch run.	Required	62.0
schedulerName	String	Name of the invoice scheduler, which must be unique in your org.	Required	62.0
startDate	String	Start date of the invoice scheduler.	Required	62.0
status	String	Status of the invoice scheduler. Valid values are: <ul style="list-style-type: none"> • Draft • Active • Inactive 	Required	62.0
targetDate	String	Target date of the invoice batch run. Billing schedules having the next billing date before this date are picked up for invoicing. The target date must be less than or equal to the maximum allowed target date for the org.	Required if the frequency cadence property is set to Once.	62.0
targetDateOffset	Integer	Target date offset applied to the next invoice run date to calculate the target date. The offset is the number of days added to or subtracted from the next billing date.	Required if the frequency cadence property is set to Daily, Weekly, or Monthly.	62.0
timezone	String	Time zone that's applicable for the invoice scheduler.	Optional	62.0

Response body for POST[Batch Invoice Scheduler](#)**Batch Payment Scheduler (POST)**

Create a payment scheduler to automate and process payment runs on a recurring basis.

Special Access Rules

You need the Payment Ops permission set to use this API.

Resource

```
/commerce/payments/payment-schedulers/
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/commerce/payments/payment-schedulers/
```

Available version

64.0

HTTP methods

POST

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

```
{
  "schedulerName": "Payment Scheduler",
  "startDate": "2022-01-01",
  "endDate": "2022-12-31",
  "preferredTime": "02:05:00.000",
  "frequencyCadence": "Monthly",
  "recursEveryMonthOnDay": "28",
  "criteriaMatchType": "MatchAny",
  "status": "Active",
  "filterCriteria": [
    {
      "objectName": "PaymentScheduleItem",
      "fieldName": "PaymentRunMatchingValue",
      "operation": "Equals",
      "value": "1",
      "criteriaSequence": 1
    },
    {
      "objectName": "PaymentScheduleItem",
      "fieldName": "PaymentRunMatchingValue",
      "operation": "Equals",
      "value": "2",
      "criteriaSequence": 2
    },
    {
      "objectName": "PaymentScheduleItem",
      "fieldName": "PaymentRunMatchingValue",
      "operation": "Equals",
      "value": "3",
      "criteriaSequence": 3
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
criteria MatchType	String	Match type for the criteria of the payment scheduler. Valid values are: <ul style="list-style-type: none"> • Match Any • Match None 	Required if the <code>frequencyCadence</code> property is set to <code>Monthly</code> .	64.0
endDate	String	End date of the payment scheduler.	Required if the <code>frequencyCadence</code> property is set to <code>Monthly</code> .	64.0
frequency Cadence	String	Frequency cadence of the payment scheduler. Valid values are: <ul style="list-style-type: none"> • Once • Daily • Weekly • Monthly 	Required	64.0
filter Criteria	Payment Run Batch Filter Criteria Input	List of criteria that are used to filter the payment run details.	Required if the <code>frequencyCadence</code> property is set to <code>Monthly</code> .	64.0
preferredTime	String	Preferred time for the payment scheduler run.	Required	64.0
recursEvery MonthOnDay	String	Date when the payment scheduler recurs.	Required if the <code>frequencyCadence</code> property is set to <code>Monthly</code> .	64.0
scheduler Name	String	Name of the payment scheduler.	Required	64.0
startDate	String	Start date of the payment scheduler.	Required	64.0
status	String	Status of the payment scheduler. Valid values are: <ul style="list-style-type: none"> • Active • Canceled • Draft • Inactive 	Required	64.0

Response body for POST[Batch Payments Scheduler](#)

Billing Schedule Recovery List (POST)

Recover the latest generated invoice associated with the billing schedules in the `Error` or `Processing` status.

Billing schedules include critical details such as the amount to be billed, next billing date, and status. An invoice can be associated with one or more billing schedules. When an invoice is generated or posted, the billing schedules are updated to reflect the accurate state of the invoice. The billing schedules associated with an invoice are marked in the `Error` status if any of the invoicing processes have errors. Use this API to recover the invoice associated with the billing schedules in the `Error` or `Processing` status.

Special Access Rules

You need the Manage Errors Using Invoice Error Recovery API permission set to use this API.

Resource

```
/commerce/invoicing/billing-schedules/collection/actions/recover
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/commerce/invoicing/billing-schedules/collection/actions/recover
```

Available version

62.0

HTTP methods

POST

Request body for POST**JSON example**

```
{
  "billingScheduleIds": ["44bDU000000000XXYAY"]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
billingScheduleIds	String[]	IDs of the billing schedules to recover the invoice for. You can recover one billing schedule per API request.	Required	62.0

Response body for POST[Billing Schedule Recovery List](#)

Create Billing Schedules for Orders (POST)

Generate billing schedules for orders by using context service.

Special Access Rules

The org must have the standard billing context definition with the target mapping. This context definition is available in orgs with Billing enabled. Additionally, you need the Create Billing Schedules From Billing Transactions API permission set and the Context Service Runtime permission set to use this API.

See these [requirements](#) to learn more about the configuration prerequisites.

Resource

```
/commerce/invoicing/billing-schedules/actions/create
```

Resource example

```
https://your.Instance.salesforce.com/services/data/v65.0/commerce/invoicing/billing-schedules/actions/create
```

Available version

62.0

HTTP methods

POST

Request body for POST

JSON example

```
{
  "billingTransactionIds": [ "801xx000003H1H9AAK" ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
billing Transaction Ids	String[]	<p>ID of the billing transaction. This property value is the ID of the order if the source of the billing request is for the Order object.</p> <p>If the order product associated with the specified order ID doesn't have an associated billing treatment ID, the API considers the default billing treatment ID. The generated billing schedule group has the default billing treatment ID.</p> <p>The API supports only one billing transaction ID in the input.</p>	Required	62.0

Response body for POST

[Context-Aware Billing Schedule](#)

Create a Sequence Policy (POST)

Create a sequence policy to configure a unique, sequential number for all posted invoices.

A sequence policy ensures unique identification and systematic tracking of financial transactions, supporting regulatory compliance and preventing fraud. You can create a sequence policy for invoices only.

Special Access Rules

You need the Billing Admin permission set to use this API.

Resource

```
/connect/sequences/policy
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/sequences/policy
```

Available version

65.0

HTTP methods

POST

Request body for POST

JSON example

This example shows a sample request to create a sequence policy.

```
{
  "name": "Sample Sequence Policy",
  "description": "This is a sample sequence policy.",
  "effectiveFromDate": "2025-08-10",
  "expirationDate": "2025-09-20",
  "isActive": true,
  "sequenceMode": "Basic",
  "targetObject": "Invoice",
  "dateStampFormat": "Yyyy",
  "sequenceStartNumber": 1,
  "incrementNumber": 1,
  "maximumSequenceNumber": 1000,
  "minimumSequenceNumberWidth": 2,
  "filterCriteria": "Custom",
  "selectionLogic": "selectionLogic",
  "sequencePattern": "INV-{SequenceValue}-abc",
  "selectionCondition": [
    {
      "filterField": "AppType",
      "operator": "Equals",
      "filterValue": "RLM",
      "conditionNumber": 1
    },
    {
      "filterField": "Status",
      "operator": "Equals",
      "filterValue": "Posted",
      "conditionNumber": 2
    },
    {
      "filterField": "LegalEntity",
```

```

    "operator": "Equals",
    "filterValue": "US",
    "conditionNumber": 3
  }
]
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
dateStamp Format	String	Format of the stamp date that's appended to the sequence number. You can't edit this property by using the Update Sequence Policy API.	Required	65.0
description	String	Additional details about the sequence policy.	Optional	65.0
effectiveFrom DateTime	String	Date and time when the policy becomes effective. The default value is the current date.	Required	65.0
expiration DateTime	String	Date and time when the policy expires.	Optional	65.0
filter Criteria	String	Criteria to filter the target objects.	Required	65.0
increment Number	Integer	Value by which the sequence number increases until it reaches the maximum number. This value must be greater than or equal to 1. The default value is 1. You can't edit this property by using the Update Sequence Policy API.	Required	65.0
isActive	Boolean	Indicates whether the policy is active (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code> .	Required	65.0
maximumSequence Number	Integer	Maximum number the sequence number can reach.	Optional	65.0
minimumSequence NumberWidth	Integer	Minimum number of digits a sequence number must have. You can't edit this property by using the Update Sequence Policy API.	Optional	65.0
name	String	Name of the sequence policy.	Required	65.0
selection Condition	Selection Condition Input[]	Criteria to determine which sequence policy is applied to a record. This property includes conditions based on any standard or custom fields of the record.	Optional	65.0

Name	Type	Description	Required or Optional	Available Version
selection Logic	String	Logic that determines the objects that the sequence policy applies to.	Optional	65.0
sequenceMode	String	Specifies how sequence numbers are generated. Valid values are: <ul style="list-style-type: none"> <code>Basic</code>—Assigns sequential numbers without gap reconciliation. <code>Gapless</code>—Assigns sequential numbers with gap reconciliation. The usage of this value ensures that the posted invoices don't have any numbering gaps for audits and compliance. <p>You can't edit this property by using the Update Sequence Policy API.</p>	Required	65.0
sequence Pattern	String	Pattern structure that's followed for the sequence.	Required	65.0
sequenceStart Number	Integer	Starting value of the sequence number, which must be greater than or equal to 0. The default value is 1. You can't edit this property by using the Update Sequence Policy API.	Required	65.0
targetObject	Object	Object that the policy is applied to. Valid value is <code>Invoice</code> . You can create a sequence policy for invoices only. You can't edit this property by using the Update Sequence Policy API.	Required	65.0
timeZone	String	Time zone that's applicable for the sequence policy.	Optional	65.0

Response body for POST

[Sequence Policy](#)

Create Standalone Billing Schedules (POST)

Generate billing schedules from any internal or external transaction by using context service.

You can create a billing schedule from any `sObject` such as `WorkOrder`, `Cart`, `Order`, `Opportunity`, and insurance policy.

The Create Standalone Billing Schedules (POST) API uses the `StandaloneBillingContext` context definition to hydrate the context of the transaction. The context definition includes these mappings.

- The `TransactionMapping` maps the fields of the transaction to the attributes of the `Transaction` node.

- The BSGEntitiesMapping maps the attributes of the Billing Schedule node, the Billing Schedule Group node, and Billing Schedule Group Relationship node to the fields of the corresponding Salesforce objects.

For the StandaloneBillingContext context definition to hydrate all the required data, transaction data for the mandatory context tags are required. Here are the topics that mention the mandatory and optional tags, sample transaction details, and sample payloads for various types of transactions.

- [One-Time New Sale Transaction](#) on page 1913
- [Term-Defined New Sale Transaction](#) on page 1920
- [Evergreen New Sale Transaction](#) on page 1927
- [New Sale Transaction With Bundled Products](#) on page 1934
- [New Sale Transaction With Ramped Products](#) on page 1943
- [New Sale Transaction With Usage Products](#) on page 1950
- [Amended Transaction](#) on page 1957
- [Renewal Transaction](#) on page 1964
- [Early Renewal Transaction](#) on page 1971
- [Canceled Transaction](#) on page 1979

Special Access Rules

This API is available with the Revenue Cloud Billing license.

Resource

```
/commerce/invoicing/standalone/billing-schedules/actions/create
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/commerce/invoicing/standalone/billing-schedules/actions/create
```

Available version

64.0

HTTP methods

POST

Request body for POST

JSON example

```
{
  "transactionDetails": "{\\"nodeName\\": [\\"id\\":\\"001SG000004Fv1GYAS\\",
  \\"businessSubjectType\\": \\"Account\\", \\"Quantity\\":\\"4\\", \\"Name\\":
  \\"TestAccount\\"]}",
  "transactionContextDetails": {
    "contextDefinitionName": "StandaloneBillingContext",
    "intraContextCustomMappingName": "CustomContextMapping",
    "readContextMappingName": "OrderTransactionMapping",
    "saveContextMappingName": "BSGEntitiesMapping"
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
transaction ContextDetails	Context-Aware Standalone Billing Schedule Metadata Input[]	<p>Details of the context definition and its mappings that are used to hydrate the transaction data and save it in the appropriate Billing fields.</p> <p>The API request supports a single mapping ID. You can send separate requests for line items and line details by using their respective mapping IDs. However, this approach can result in duplicate billing schedules for the same line items and line details.</p>	Required	64.0
transaction Details	String	Input JSON data that includes the ID of the transaction record for which the billing schedule must be created and other additional transaction details.	Required	64.0

Response body for POST

[Context-Aware Billing Schedule](#)

SEE ALSO:

[Salesforce Help: Context Service](#)

[Industries Common Resources Developer Guide: Context Service](#)

[BillingScheduleGroup](#)

Credit Memo Create and Apply (POST)

Create a credit memo and apply it to an invoice. The credit memo can fully or partially credit the invoice.

Use this API to adjust an outstanding invoice balance or rectify errors in an invoice. In the API request, pass a list of invoice lines to credit. Keep these considerations in mind when you use this API.

- The request must contain at least one invoice line. Each invoice line must have the invoice line's ID, the amount to credit, and any optional tax details. The invoice lines must be a part of the invoice passed in the resource.
- The amount to credit must not exceed the charge or adjustment amount of an individual invoice line.
- The request body's credit amount inclusive of taxes must not exceed the target invoice line's amount inclusive of taxes, except for taxes calculated through an external tax service.
- The request body's total credit amount inclusive of taxes calculated through an external tax service must not exceed the outstanding invoice balance, which is also inclusive of taxes.

This API creates and posts a credit memo. The credit memo has one credit memo line for each invoice line passed in the API request. The invoice balance reduces by a value equal to the credit memo's balance. This API modifies the balance of a posted invoice or invoice line based on the specified credit application level for your org. See [Apply Credits to Posted Invoices or Invoice Lines](#).

Special Access Rules

You need the Credit Memo Operations User permission set to use this API.

Resource

```
/commerce/invoicing/invoices/invoiceId/actions/credit
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/commerce/invoicing/invoices/3TLR000000008NETAY/actions/credit
```

Available version

62.0

HTTP methods

POST

Path parameter for POST

Name	Type	Description	Required or Optional	Available Version
invoiceId	String	ID of the invoice to be credited partially or fully. The status of the invoice must be Posted.	Required	62.0

Request body for POST**JSON example**

This example shows a sample request with the Calculate tax strategy.

```
{
  "type": "POSTED",
  "taxStrategy": "Calculate",
  "taxEffectiveDate": "2024-07-20",
  "effectiveDate": "2024-07-20",
  "description": "Credit Invoice",
  "invoiceLines": [
    {
      "invoiceLineId": "5TVR00000004SiqOBE",
      "amountToCredit": 5
    }
  ]
}
```

This example shows a sample request with the CopyFromInvoiceLine tax strategy.

```
{
  "type": "POSTED",
  "taxStrategy": "CopyFromInvoiceLine",
  "effectiveDate": "2020-05-22",
  "description": "Credit Invoice",
  "invoiceLines": [
    {
      "invoiceLineId": "5TVR00000004SiqOBE",
      "amountToCredit": "5",

```



```

    "taxStrategy": "CopyFromInvoiceLine"
  }
]
}

```

This example shows a sample request with the ManualOverride and CopyFromInvoiceLine tax strategies.

```

{
  "type": "POSTED",
  "taxStrategy": "ManualOverride",
  "taxEffectiveDate": "2021-08-01",
  "effectiveDate": "2021-08-01",
  "description": "Credit issued because product was malfunctioning.",
  "invoiceLines": [
    {
      "invoiceLineId": "5TVR00000004SiqOBE",
      "amountToCredit": 100,
      "taxStrategy": "ManualOverride",
      "taxEffectiveDate": "2021-08-01T21:22:41.000Z",
      "taxes": [
        {
          "taxAmount": 15,
          "taxName": "abc",
          "taxCode": "taxCode",
          "taxRate": 7
        }
      ],
      "addresses": {
        "billingAddress": {
          "street": "1 Market St #300",
          "city": "San Francisco",
          "state": "CA",
          "country": "US",
          "postalCode": "94105",
          "latitude": "37.789901",
          "longitude": "-122.396923"
        },
        "shippingAddress": {
          "street": "415 Mission St",
          "city": "San Francisco",
          "state": "CA",
          "country": "US",
          "postalCode": "94105",
          "latitude": "37.789901",
          "longitude": "-122.396923"
        }
      }
    },
    {
      "invoiceLineId": "5TVR00000004SiqOAE",
      "amountToCredit": 200,
      "taxStrategy": "CopyFromInvoiceLine"
    }
  ]
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
description	String	Description for the credit memo to be created.	Optional	62.0
effectiveDate	String	Date when the credit memo takes effect.	Optional	62.0
invoiceLines	Credit Invoice Line Input[]	List of the invoice lines to be credited. The invoice line IDs must be related to the invoice ID specified in the API request. If invoice lines aren't specified, the API request results in an error.	Required	62.0
taxEffectiveDate	String	Date when the tax takes effect to recalculate the taxes.	Optional	62.0
taxStrategy	String	Tax strategy to be applied across invoice lines. You can override the tax strategy at the individual invoice line level or at the tax line level. Valid values are: <ul style="list-style-type: none"> <code>Ignore</code>—Specifies that the creation of tax lines must be ignored. <code>ManualOverride</code>—Specifies that the provided tax values must be considered for taxes. <code>CopyFromInvoiceLine</code>—Specifies that tax values must be copied from the invoice line. <code>Calculate</code>—Specifies that tax must be calculated by using the API. 	Required	62.0
type	String	Type of credit memo to be created. Valid value is <code>Posted</code> .	Optional	62.0

Response body for POST

[Revenue Async Line Level](#)

Credit Memo Apply List (POST)

Adjust or correct already issued invoices by applying an existing credit memo to an invoice.

Specify the credit memo ID and the amounts to be applied, with the total of all applied amounts not exceeding the credit memo's balance.

The credit amount for each invoice can't surpass the original charge or adjustment amount, and the overall credit amount must not exceed the invoice's outstanding balance. The exceptions include any taxes calculated by an external service.

For example, your organization sold 10 tablets at US\$500 each, totaling \$5000, to a vendor who later reported that 6 tablets were defective. Your accounts receivable team creates a \$3000 credit memo by using the standalone Credit Memo API. Additionally, the team applies this credit to the original invoice by using the Credit Memo Apply API.

Special Access Rules

You need the Credit Memo Operations User permission set to use this API.

Resource

```
/commerce/invoicing/credit-memos/creditMemoId/actions/apply
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/commerce/invoicing/credit-memos/50sg0000000xATVA2/actions/apply
```

Available version

62.0

HTTP methods

POST

Path parameter for POST

Name	Type	Description	Required or Optional	Available Version
creditMemoId	String	ID of the credit memo record.	Required	62.0

Request body for POST

JSON example

```
{
  "applications": [
    {
      "appliedToId": "3ttxx000000003FAAQ",
      "amount": 10,
      "description": "Apply to invoice for refund",
      "effectiveDate": "2024-07-01"
    },
    {
      "appliedToId": "3ttxx0000000001AAA",
      "amount": 100
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
applications	Credit Memo Apply Application Input[]	List of one or more applications to apply the credit memo for. Each application represents an invoice that's credited by	Required	62.0

Name	Type	Description	Required or Optional	Available Version
		using the balance of the specified credit memo.		

Response body for POST

[Credit Memo Apply List](#)

Credit Memo Unapply (POST)

Unapply a credit memo from an invoice and return the invoice and the credit memo to their pre-application states.

Use this resource if an error occurred when a credit is issued. For example, if an incorrect credit memo is applied to an invoice, or if a credit memo is created for an incorrect amount, use this resource to unapply the credit memo.

Special Access Rules

You need the Credit Memo Operations User permission set to use this API.

Resource

```
/commerce/invoicing/credit-memo-inv-applications/creditMemoInvApplicationId/actions/unapply
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/commerce/invoicing/credit-memo-inv-applications/4s5300002nPE2A/actions/unapply
```

Available version

62.0

HTTP methods

POST

Path parameter for POST

Name	Type	Description	Required or Optional	Available Version
creditMemoInvApplicationId	String	ID of the credit memo invoice application.	Required	62.0

Request body for POST**JSON example**

```
{
  "description": "Unapply credit memo from invoice to revert an error",
  "effectiveDate": "2024-07-01"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
description	String	Explanation or reason for unapplying the credit memo.	Optional	62.0
effectiveDate	String	Effective date for the credit memo.	Optional	62.0

Response body for POST

[Credit Memo Unapply](#)

Credit Memo Line Apply (POST)

Adjust or correct already issued invoices by applying an existing credit memo line to an invoice line.

Special Access Rules

You need the Credit Memo Operations User permission set to use this API.

Resource

```
/commerce/invoicing/credit-memo-lines/creditMemoLineId/actions/apply
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/commerce/invoicing/credit-memo-lines/92233000000LHVA2/actions/apply
```

Available version

62.0

HTTP methods

POST

Path parameter for POST

Name	Type	Description	Required or Optional	Available Version
creditMemoLineId	String	ID of the credit memo line record.	Required	62.0

Request body for POST**JSON example**

```
{
  "applyCreditDetails": [
    {
      "invoiceLineId": "5TVSG0000002ZJR4A2",
      "appliedAmount": 5,
      "description": "Apply to invoice line 1",
      "effectiveDate": "2024-07-01"
    }
  ]
}
```

```

},
{
  "invoiceLineId": "5TVSG0000002ZJS4A2",
  "appliedAmount": 10,
  "description": "Apply to invoice line 2",
  "effectiveDate": "2024-07-01"
}
]
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
applyCreditDetails	Credit Memo Line Application Input[]	List of one or more applications to apply the credit memo line for. Each application represents an invoice line that's credited by using the balance of the specified credit memo line.	Required	62.0

Response body for POST

[Credit Memo Line Applied](#)

Credit Memo Line Unapply (POST)

Unapply a credit memo line from an invoice line and return the invoice line and the credit memo line to their pre-application states.

Special Access Rules

You need the Credit Memo Operations User permission set to use this API.

Resource

```
/commerce/invoicing/credit-memo-line-invoice-line/creditMemoLineInvoiceLineId/actions/unapply
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v62.0/commerce/invoicing/credit-memo-line-invoice-line/4SG3000002ZJS4A2/actions/unapply
```

Available version

62.0

HTTP methods

POST

Path parameter for POST

Name	Type	Description	Required or Optional	Available Version
creditMemoLineInvoiceLineId	String	ID of the credit memo line invoice line record.	Required	62.0

Request body for POST**JSON example**

```
{
  "description": "Unapply a credit memo line from invoice line 1",
  "effectiveDate": "2024-07-01"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
description	String	Explanation or reason for unapplying the credit memo line.	Optional	62.0
effectiveDate	String	Effective date for the credit memo line.	Optional	62.0

Response body for POST

[Credit Memo Line Unapplied](#)

Invoice Creation (POST)

Create an invoice for an account, order, or a list of billing schedules.

This API request creates billing period items for the matching billing schedules. The billing period items are created for the period between the next charge date of the billing schedule and the specified target date. Invoice lines are created by processing these billing period items. These invoice lines are then grouped into invoices based on the defined grouping criteria on the billing schedule.

This API also applies any available credits on an account to settle an invoice and to reduce its balance. To apply available credits, ensure the **Apply Credits to Posted Invoices** setting from Billing Settings is turned on.

Special Access Rules

You need the Generate Invoices From Billing Schedule API, Billing Operations User, or Billing Customer Service permission set to use this API.

Resource

```
/commerce/invoicing/invoices/collection/actions/generate
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/commerce/invoicing/invoices/collection/actions/generate
```


Available version

62.0

HTTP methods

POST

Request body for POST

 **Note:** The `billingTransactionId` property takes precedence over the `accountId` property followed by the `billingScheduleIds` property when values for these properties are specified in the input request.

JSON example

```
{
  "accountId": "001SG00000mYtRWYAO",
  "action": "Posted",
  "billingScheduleIds": [
    "44bSG000000CVeMYAW"
  ],
  "billingTransactionId": "801SG00000mYtaXYAS",
  "correlationId": null,
  "invoiceDate": "2024-01-12",
  "targetDate": "2024-01-12"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
accountId	String	ID of the account record to create the invoices for.	Required if the <code>billingScheduleIds</code> or <code>billingTransactionId</code> property isn't specified.	63.0
action	String	Type of invoice to be created. Valid values are: <ul style="list-style-type: none"> Draft Posted 	Required	62.0
billingScheduleIds	String[]	List of billing schedule IDs that's used to create the invoices. You can specify a maximum of 200 billing schedules.	Required if the <code>accountId</code> or <code>billingTransactionId</code> property isn't specified.	62.0
billingTransactionId	String	ID of the billing transaction record, which is the order ID, to create the invoices for.	Required if the <code>accountId</code> or <code>billingScheduleIds</code> property isn't specified.	63.0
correlationId	String	Property that's tagged against the published <code>InvoiceProcessedEvent</code> event, if specified.	Optional	62.0

Name	Type	Description	Required or Optional	Available Version
invoiceDate	String	Stamping date of the invoice in ISO 8601 format.	Required	62.0
targetDate	String	Date in ISO 8601 format used to decide the billing periods that are included to create invoices.	Required	62.0

Response body for POST

[Revenue Async Response](#)

Invoice Draft to Posted Status (POST)

Update the status of the invoice from Draft to Posted.

This API calls an external tax engine or provides information to your tax adapter implementation to calculate taxes for the draft invoice, post the invoice, and update the related billing schedules and billing periods.

Special Access Rules

You need the Billing Operations User permission set to use this API.

Resource

```
/commerce/invoicing/invoices/collection/actions/post
```

Resource example

```
https://your.Instance.salesforce.com/services/data/v65.0/commerce/invoicing/invoices/collection/actions/post
```

Available version

62.0

HTTP methods

POST

Request body for POST

JSON example

```
{
  "invoiceIds": ["3ttxx0000004CIjAAM"]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
correlationId	String	Splunk correlation ID to track the messages that are related to the request and are logged in Splunk by the different services involved in the request. If the ID	Optional	62.0

Name	Type	Description	Required or Optional	Available Version
		isn't specified, the service creates a random Universally Unique Identifier (UUID).		
invoiceIds	String[]	IDs of the invoice records in <code>Draft</code> status to be posted. You can post one draft invoice per API request.	Required	62.0

Response body for POST

[Revenue Async Response](#)

Invoice Ingestion (POST)

Ingest or generate an invoice from an internal or external billing transaction data.

Create invoices from any external or internal transaction. For example, create invoices by using external orders, policies, or quotes, or internal data such as assets or quotes.

You can also ingest invoices from any external system into Billing, and perform any invoice operations such as issuing credits against an invoice or voiding an invoice.

Keep these considerations in mind when you use this API.

- Use the [Negative Invoice Lines to Credit Conversion API](#) to create a credit memo against an ingested negative invoice line.
- Use the [Apply Credit Action](#) to apply a credit memo to an invoice.
- To ingest legacy invoices, at least one invoice line must be created.

Resource

```
/commerce/invoicing/invoices/collection/actions/ingest
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/commerce/invoicing/invoices/collection/actions/ingest
```

Available version

63.0

HTTP methods

POST

Request body for POST

JSON example

This example shows a sample request to ingest a draft invoice with a tax callout.

```
{
  "invoices": [
    {
      "shouldCalculateTax": true,
      "taxCalculationStatus": "Estimated",
      "graph": {
```

```

"graphId": "CreateInvoice",
"records": [
  {
    "referenceId": "refAccount",
    "record": {
      "attributes": {
        "type": "Account",
        "method": "GET",
        "id": "ExternalId__c/123"
      }
    }
  },
  {
    "referenceId": "refContact",
    "record": {
      "attributes": {
        "type": "Contact",
        "method": "GET",
        "id": "ExternalId__c/123"
      }
    }
  },
  {
    "referenceId": "refInvoice",
    "record": {
      "Attributes": {
        "type": "Invoice",
        "method": "POST"
      },
      "billingAccountId": "001SG00000mKffGYAW",
      "billToContactId": "003SG00000Bnv5HYAR",
      "paymentTermId": "20Xxx0000004CFUGA2",
      "referenceEntityId": "801xx000003GeQQAA0",
      "status": "Draft",
      "invoiceDate": "2024-12-19",
      "currencyIsoCode": "USD",
      "dueDate": "2024-12-19",
      "invoiceNumber": "DOC-10",
      "description": "Sample Invoice",
      "uniqueIdentifier": "5873af8f-f007-4aa0-9e3d-53a08c3f59de"
    }
  },
  {
    "referenceId": "refBillingAddress",
    "record": {
      "Attributes": {
        "type": "InvoiceAddressGroup",
        "method": "POST"
      },
      "street": "123 Main St",
      "city": "NewYork",
      "postalCode": "10001",
      "state": "New York",
      "country": "US",

```

```

        "longitude": "123.456",
        "latitude": "78.910",
        "invoiceId": "3ttSG000000EPjJYAW"
    }
},
{
    "referenceId": "refShippingAddress",
    "record": {
        "attributes": {
            "type": "InvoiceAddressGroup",
            "method": "POST"
        },
        "street": "123 Main St",
        "city": "NewYork",
        "postalCode": "10001",
        "state": "New York",
        "country": "US",
        "longitude": "123.456",
        "latitude": "78.910",
        "invoiceId": "3ttSG000000EPjJYAW"
    }
},
{
    "referenceId": "refInvoiceLine1",
    "record": {
        "attributes": {
            "type": "InvoiceLine",
            "method": "POST"
        },
        "name": "productName1",
        "product2Id": "01txx0000006ic4AAA",
        "invoiceLineStartDate": "2024-11-10",
        "invoiceLineEndDate": "2024-11-13",
        "quantity": "10",
        "unitPrice": "10",
        "chargeAmount": "100",
        "invoiceId": "3ttSG000000EPjJYAW",
        "referenceEntityItemId": "802xx000001neB9AAI",
        "billingAddressId": "8zzSG0000000IbFYAU",
        "shippingAddressId": "8zzSG0000000IbGYAU",
        "taxTreatmentId": "1ttxx0000000BOTAA2",
        "legalEntityId": "0fwxx000000001AAA",
        "legalEntityAccountingPeriodId": "1HLxx0000004C92GAE"
    }
},
{
    "referenceId": "refInvoiceLine2",
    "record": {
        "attributes": {
            "type": "InvoiceLine",
            "method": "POST"
        },
        "name": "productName2",
        "product2Id": "01txx0000006ic4AAA",

```

```

    "invoiceLineStartDate": "2024-11-10",
    "invoiceLineEndDate": "2024-11-15",
    "quantity": "10",
    "unitPrice": "10",
    "chargeAmount": "100",
    "invoiceId": "3ttSG000000EPjJYAW",
    "referenceEntityItemId": "802xx000001neB9AAI",
    "billingAddressId": "8zzSG0000000IbFYAU",
    "shippingAddressId": "8zzSG0000000IbGYAU",
    "taxTreatmentId": "1ttxx00000001DpAAI",
    "legalEntityId": "0fwxx000000001AAA",
    "legalEntityAccountingPeriodId": "1HLxx0000004C92GAE"
  }
},
{
  "referenceId": "refInvoiceLineTax",
  "record": {
    "attributes": {
      "type": "InvoiceLineTax",
      "method": "POST"
    },
    "taxAmount": 7.25,
    "taxCode": "CA-94121",
    "taxName": "CALIFORNIA",
    "taxRate": 0.25,
    "taxEffectiveDate": "2024-11-10",
    "taxDocumentNumber": "123",
    "taxExemptAmount": 0,
    "taxTransactionNumber": "kl",
    "description": "Associated tax line.",
    "invoiceLineId": "5TVSG0000004dAr4AI"
  }
},
{
  "referenceId": "refInvoiceLineTax1",
  "record": {
    "attributes": {
      "type": "InvoiceLineTax",
      "method": "POST"
    },
    "taxAmount": "10",
    "taxCode": "CA-94121",
    "taxName": "CALIFORNIA",
    "taxRate": 0.25,
    "taxEffectiveDate": "2024-11-10",
    "taxDocumentNumber": "123",
    "taxExemptAmount": 0,
    "taxTransactionNumber": "125",
    "invoiceLineId": "5TVSG0000004xeD4AQ",
    "description": "Associated tax line."
  }
}
]
}

```

```

    }
  ]
}

```

This example shows a sample request ingest a draft invoice without a tax callout.

```

{
  "invoices": [
    {
      "taxCalculationStatus": "Estimated",
      "graph": {
        "graphId": "123",
        "records": [
          {
            "referenceId": "refAccount",
            "record": {
              "attributes": {
                "type": "Account",
                "method": "GET",
                "id": "TestExternalId__c/123"
              }
            }
          },
          {
            "referenceId": "refInvoice",
            "record": {
              "Attributes": {
                "type": "Invoice",
                "method": "POST"
              },
              "billingAccountId": "@{refAccount.Id}",
              "billToContactId": "003xx000004Wk8qAAC",
              "paymentTermId": "20Xxx0000004CFUGA2",
              "referenceEntityId": "801xx000003GeQQAA0",
              "status": "Draft",
              "invoiceDate": "2024-12-19",
              "currencyIsoCode": "USD",
              "dueDate": "2024-12-19",
              "invoiceNumber": "DOC-10",
              "description": "testInvoice",
              "uniqueIdentifier": "c76011a1-e113-49d9-9c54-3b5c68950ada"
            }
          },
          {
            "referenceId": "refBillingAddress",
            "record": {
              "Attributes": {
                "type": "InvoiceAddressGroup",
                "method": "POST"
              },
              "street": "123 Main St",
              "city": "NewYork",
              "postalCode": "10001",
              "state": "New York",
              "country": "US",

```

```

        "longitude": "123.456",
        "latitude": "78.910",
        "invoiceId": "@{refInvoice.id}"
    }
},
{
    "referenceId": "refShippingAddress",
    "record": {
        "attributes": {
            "type": "InvoiceAddressGroup",
            "method": "POST"
        },
        "street": "123 Main St",
        "city": "NewYork",
        "postalCode": "10001",
        "state": "New York",
        "country": "US",
        "longitude": "123.456",
        "latitude": "78.910",
        "invoiceId": "@{refInvoice.id}"
    }
},
{
    "referenceId": "refInvoiceLine1",
    "record": {
        "attributes": {
            "type": "InvoiceLine",
            "method": "POST"
        },
        "name": "productName1",
        "product2Id": "01txx0000006ic4AAA",
        "invoiceLineStartDate": "2024-11-10",
        "invoiceLineEndDate": "2024-11-13",
        "quantity": "10",
        "unitPrice": "10",
        "chargeAmount": "100",
        "invoiceId": "@{refInvoice.id}",
        "referenceEntityItemId": "802xx000001neB9AAI",
        "billingAddressId": "@{refBillingAddress.id}",
        "shippingAddressId": "@{refShippingAddress.id}",
        "taxTreatmentId": "1ttxx0000000BOTAA2",
        "legalEntityId": "0fwxx0000000001AAA",
        "legalEntityAccountingPeriodId": "1HLxx0000004C92GAE"
    }
},
{
    "referenceId": "refInvoiceLine2",
    "record": {
        "attributes": {
            "type": "InvoiceLine",
            "method": "POST"
        },
        "name": "productName2",
        "product2Id": "01txx0000006ic4AAA",

```

```

    "invoiceLineStartDate": "2024-11-10",
    "invoiceLineEndDate": "2024-11-15",
    "quantity": "10",
    "unitPrice": "10",
    "chargeAmount": "100",
    "invoiceId": "@{refInvoice.id}",
    "referenceEntityItemId": "802xx000001neB9AAI",
    "billingAddressId": "@{refBillingAddress.id}",
    "shippingAddressId": "@{refShippingAddress.id}",
    "taxTreatmentId": "1ttxx00000001DpAAI",
    "legalEntityId": "0fwxx000000001AAA",
    "legalEntityAccountingPeriodId": "1HLxx0000004C92GAE"
  }
},
{
  "referenceId": "refInvoiceLineTax",
  "record": {
    "attributes": {
      "type": "InvoiceLineTax",
      "method": "POST"
    },
    "taxAmount": 7.25,
    "taxCode": "CA-94121",
    "taxName": "CALIFORNIA",
    "taxRate": 0.25,
    "taxEffectiveDate": "2024-11-10",
    "taxDocumentNumber": "123",
    "taxExemptAmount": 0,
    "taxTransactionNumber": "kl",
    "description": "description for tax Line",
    "invoiceLineId": "@{refInvoiceLine1.id}"
  }
},
{
  "referenceId": "refInvoiceLineTax1",
  "record": {
    "attributes": {
      "type": "InvoiceLineTax",
      "method": "POST"
    },
    "taxAmount": "10",
    "taxCode": "CA-94121",
    "taxName": "CALIFORNIA",
    "taxRate": 0.25,
    "taxEffectiveDate": "2024-11-10",
    "taxDocumentNumber": "123",
    "taxExemptAmount": 0,
    "taxTransactionNumber": "125",
    "invoiceLineId": "@{refInvoiceLine2.id}",
    "description": "description for tax Line"
  }
}
]
}

```



```

    }
  ]
}

```

This example shows a sample request to ingest posted invoices.

```

{
  "invoices": [
    {
      "taxCalculationStatus": "Posted",
      "graph": {
        "graphId": "123",
        "records": [
          {
            "referenceId": "refAccount",
            "record": {
              "attributes": {
                "type": "Account",
                "method": "GET",
                "id": "ExternalId__c/123"
              }
            }
          },
          {
            "referenceId": "refInvoice",
            "record": {
              "Attributes": {
                "type": "Invoice",
                "method": "POST"
              },
              "billingAccountId": "001SG00000njpF3YAI",
              "billToContactId": "003xx000004Wk8qAAC",
              "paymentTermId": "20Xxx0000004CFUGA2",
              "referenceEntityId": "801xx000003GeQQAA0",
              "status": "Posted",
              "invoiceDate": "2024-12-19",
              "currencyIsoCode": "USD",
              "dueDate": "2024-12-19",
              "invoiceNumber": "DOC-10",
              "description": "Sample Invoice",
              "uniqueIdentifier": "9994b2c4-c0c3-47c3-806f-ae6e1f16bac3"
            }
          },
          {
            "referenceId": "refBillingAddress",
            "record": {
              "Attributes": {
                "type": "InvoiceAddressGroup",
                "method": "POST"
              },
              "street": "123 Main St",
              "city": "NewYork",
              "postalCode": "10001",
              "state": "New York",
              "country": "US",

```

```

        "longitude": "123.456",
        "latitude": "78.910",
        "invoiceId": "3ttSG000000FFWbYAO"
    }
},
{
    "referenceId": "refShippingAddress",
    "record": {
        "attributes": {
            "type": "InvoiceAddressGroup",
            "method": "POST"
        },
        "street": "123 Main St",
        "city": "NewYork",
        "postalCode": "10001",
        "state": "New York",
        "country": "US",
        "longitude": "123.456",
        "latitude": "78.910",
        "invoiceId": "3ttSG000000FFWbYAO"
    }
},
{
    "referenceId": "refInvoiceLine1",
    "record": {
        "attributes": {
            "type": "InvoiceLine",
            "method": "POST"
        },
        "name": "productName1",
        "product2Id": "01txx0000006ic4AAA",
        "invoiceLineStartDate": "2024-11-10",
        "invoiceLineEndDate": "2024-11-13",
        "quantity": "10",
        "unitPrice": "10",
        "chargeAmount": "100",
        "invoiceId": "3ttSG000000FFWbYAO",
        "referenceEntityItemId": "802xx000001neB9AAI",
        "billingAddressId": "8zzSG0000000NmDYAU",
        "shippingAddressId": "8zzSG0000000IbGYAU",
        "taxTreatmentId": "1ttxx0000000BOTAA2",
        "legalEntityId": "0fwxx0000000001AAA",
        "legalEntityAccountingPeriodId": "1HLxx0000004C92GAE"
    }
},
{
    "referenceId": "refInvoiceLine2",
    "record": {
        "attributes": {
            "type": "InvoiceLine",
            "method": "POST"
        },
        "name": "productName2",
        "product2Id": "01txx0000006ic4AAA",

```

```

    "invoiceLineStartDate": "2024-11-10",
    "invoiceLineEndDate": "2024-11-15",
    "quantity": "10",
    "unitPrice": "10",
    "chargeAmount": "100",
    "invoiceId": "3ttSG000000FFWbYAO",
    "referenceEntityItemId": "802xx000001neB9AAI",
    "billingAddressId": "8zzSG0000000NmDYAU",
    "shippingAddressId": "8zzSG0000000IbGYAU",
    "taxTreatmentId": "1ttxx00000001DpAAI",
    "legalEntityId": "0fwxx000000001AAA",
    "legalEntityAccountingPeriodId": "1HLxx0000004C92GAE"
  }
},
{
  "referenceId": "refInvoiceLineTax1",
  "record": {
    "attributes": {
      "type": "InvoiceLineTax",
      "method": "POST"
    },
    "taxAmount": "10",
    "taxCode": "CA-94121",
    "taxName": "CALIFORNIA",
    "taxRate": 0.25,
    "taxEffectiveDate": "2024-11-10",
    "taxDocumentNumber": "123",
    "taxExemptAmount": 0,
    "taxTransactionNumber": "125",
    "invoiceLineId": "5TVSG0000004mJ04AI",
    "description": "Associated tax line."
  }
}
]
}
]
}
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
invoices	Invoice Ingestion Input[]	List of invoices to be generated or ingested, enabling the submission and processing of multiple invoices in a single request. This API supports one invoice per request. To send 25 requests at a time, see the Composite Batch request .	Required	63.0

Response body for POST

[Invoice Ingestion](#)

Invoice Estimated Tax Calculation (POST)

Calculate estimated tax for invoices with invoice lines that have the `TaxProcessingStatus` as either `Pending` or `Estimated`.

Resource

```
/commerce/invoicing/invoices/collection/actions/calculate-estimated-tax
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/commerce/invoicing/invoices/collection/actions/calculate-estimated-tax
```

Available version

63.0

HTTP methods

POST

Request body for POST

JSON example

```
{
  "invoiceIds": ["3ttxx0000004CIjAAM"]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
<code>correlationId</code>	String	Splunk correlation ID to track the messages that are related to the request and are logged in Splunk by the different services involved in the request. If the ID isn't specified, the service creates a random Universally Unique Identifier (UUID).	Optional	63.0
<code>invoiceIds</code>	String[]	IDs of the invoices for which the estimated tax must be calculated. You can specify one invoice per API request.	Required	63.0

Response body for POST

[Revenue Async Response](#)

Invoice Preview (POST)

Generate preview invoices, which includes the estimated tax amounts, for a billing transaction for the next two billing periods.

Invoice preview provides details of the upcoming invoices for orders or quotes within the system.

Special Access Rules

You need the Billing Operations User or Billing Customer Service permission set to use this API.

See these [requirements](#) to learn more about the configuration prerequisites.

Resource

```
/commerce/invoicing/invoices/collection/actions/preview
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/commerce/invoicing/invoices/collection/actions/preview
```

Available version

63.0

HTTP methods

POST

Request body for POST**JSON example**

```
{
  "billingTransactionId": "801z600000004LoIAI",
  "numberOfBillingPeriods": 2,
  "previewDate": "2024-12-04"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
billingTransactionId	String	ID of the record to generate the preview invoices for.	Required	63.0
numberOfBillingPeriods	Integer	Number of billing periods that the invoice preview is generated for. If unspecified, the default value is 2.	Optional	64.0
previewDate	String	The date on which the preview invoice is generated. For the first invoice, the preview date is the target date for generating the invoice. For the second invoice, the target date is calculated based on the preview date and the minimum billing frequency of the transactions. The default value is the current date.	Optional	63.0

Response body for POST
[Invoice Preview](#)
Invoice Run Recovery (POST)

Recover records associated with a failed invoice run. Recovery is required only when billing schedules remain in the `Processing`, `Void In Progress`, or `Error` status.

Special Access Rules

To use this API, you need the Invoice Scheduler API permission set.

Resource

```
/commerce/invoicing/invoice-batch-runs/invoiceBatchRunId/actions/recover
```

The *invoiceBatchRunId* parameter is the ID of the failed invoice batch run record whose details you want to retrieve.

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/commerce/invoicing/invoice-batch-runs/51Paa00000041wGAAU/actions/recover
```

Available version

62.0

HTTP methods

POST

Response body for POST

[Invoice Batch Run Recovery](#) on page 2068

Negative Invoice Lines to Credit Conversion (POST)

Convert a list of invoice lines with a negative amount into a posted credit memo. This conversion is applicable for a single invoice at a time.

Keep these considerations in mind when you use this API.

- All invoice lines must be related to the same invoice.
- The invoice line must have a negative amount.
- The invoice line must not be a previously converted credit memo.
- The invoice must have the `Posted` status.
- The invoice must not have any active settlements such as credit applications.

Special Access Rules

You need the Credit Memo Operations User permission set to use this API.

Resource

```
/commerce/invoicing/invoices/invoiceId/actions/convert-to-credit
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/commerce/invoicing/invoices/3ttsa000000001AAU/actions/convert-to-credit
```

Available version

62.0

HTTP methods

POST

Path parameter for POST

Name	Type	Description	Required or Optional	Available Version
invoiceId	String	ID of the invoice whose negative invoice lines must be converted into a posted credit memo.	Required	62.0

Request body for POST**JSON example**

```
{
  "invoiceLines": ["5TVxx0000004C92GAE", "5TVxx0000004C93GAE"],
  "description": "Convert negative invoice lines into credit",
  "effectiveDate": "2022-05-18"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
description	String	Description stamped on the credit memo that's created after the negative invoice line conversion.	Optional	62.0
effectiveDate	String	Date stamped on the credit memo that's created after the negative invoice line conversion.	Required	62.0
invoiceLines	String[]	Complete list of the negative invoice lines along with the associated invoice line taxes. The specified negative invoice lines are converted into a posted credit memo.	Optional	62.0

Response body for POST

[Convert Negative Invoice Lines](#)

Payment Line Apply (POST)

Allocate the balance of a payment to reduce the balance of an invoice. The response includes an ID of the payment line invoice or payment line invoice line that represents the payment balance allocated against the invoice.

Use the Commerce Payments APIs to send your payment and refund details to external payment gateways for processing against a customer's bank. See [Commerce Payments resources](#) to check the APIs for payment gateways, payment captures, and payment authorizations.

Resource

```
/commerce/billing/payments/paymentId/actions/apply
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/commerce/billing/payments/1PLR0000000001DQg/actions/apply
```

Available version

64.0

HTTP methods

POST

Path parameter for POST

Name	Type	Description	Required or Optional	Available Version
paymentId	String	ID of the payment record.	Required	64.0

Request body for POST**JSON example**

```
{
  "appliedToId": "3ttR000000001IkIAI",
  "amount": 10,
  "effectiveDate": "2020-08-11T07:53:15.000Z",
  "comments": "Apply payment",
  "associatedAccountId": "001R000000060AyuIAE"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
amount	Double	Amount that's applied. The amount must be less than the invoice line and payment balance.	Required	64.0
appliedToId	String	ID of the invoice line that this payment is applied to. Specify the IDs for these records. <ul style="list-style-type: none"> • Invoice • Invoice Line 	Required	64.0
associatedAccountId	String	ID of the associated account.	Optional	64.0
comments	String	Comments that you can add to the payment line application.	Optional	64.0
effectiveDate	String	Date from which the payment line application takes effect.	Optional	64.0

Response body for POST[Payment Line Apply](#)**Payment Line Unapply (POST)**

Revert the application of a payment line from an invoice, and return the payment and invoices to their preapplication state. Use this API to correct an input during the payment application process.

For example, you can use this API to revert an incorrect payment that's applied to an invoice, or to rectify an incorrect amount.

Use the Commerce Payments APIs to send your payment and refund details to external payment gateways for processing against a customer's bank. See [Commerce Payments resources](#) to check the APIs for payment gateways, payment captures, and payment authorizations.

Resource

```
/commerce/billing/payments/paymentId/paymentlines/paymentLineId/actions/unapply
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/commerce/billing/payments/0a01j0000000010/paymentlines/1EPR0000000000000000/actions/unapply
```

Available version

64.0

HTTP methods

POST

Path parameters for POST

Name	Type	Description	Required or Optional	Available Version
paymentId	String	ID of the payment record.	Required	64.0
paymentLineId	String	ID of the payment line record.	Required	64.0

Request body for POST**JSON example**

```
{
  "effectiveDate": "2025-05-22T11:30:25.000Z",
  "comments": "Unapply payment"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
comments	String	Comments that you can add when you revert a payment line application.	Optional	64.0
effectiveDate	String	Date from when the reversal of the payment line application is in effect.	Optional	64.0

Response body for POST[Payment Line Unapply](#)**Payment Scheduler Update (PATCH)**

Activate or deactivate a payment scheduler. You can set the status of a payment scheduler to `Active`, `Canceled`, `Draft`, or `Inactive`.

Special Access Rules

You need the Payment Ops permission set to use this API.

Resource

```
/commerce/payments/payment-schedulers/billingBatchSchedulerId
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/commerce/payments/payment-schedulers/5BSxx0000004TwGGAU
```

Available version

64.0

HTTP methods

PATCH

Path parameter for POST

Name	Type	Description	Required or Optional	Available Version
billingBatchSchedulerId	String	ID of the payment scheduler record.	Required	64.0

Request body for PATCH**JSON example****JSON example**

```
{
  "status": "Active"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
status	String	Status that must be set to activate or deactivate a payment scheduler. Valid values are: <ul style="list-style-type: none"> Active Canceled Draft 	Required	64.0

Name	Type	Description	Required or Optional	Available Version
		<ul style="list-style-type: none"> Inactive 		

Response body for PATCH[Payments Scheduler Update](#)**Post a Draft Memo (POST)**

Post a draft credit memo to a credit memo record for review and approval.

Resource

```
/commerce/invoicing/credit/collection/actions/post
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/commerce/invoicing/credit/collection/actions/post
```

Available version

65.0

HTTP methods

POST

Request body for POST**JSON example**

```
{
  "creditMemoIds": ["50gDU00000001MnYAI"]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
correlationId	String	Splunk correlation ID to use to track messages that are related to the request and logged in Splunk by the different services involved in the request. If not specified, the service creates a random Universally Unique Identifier (UUID).	Optional	65.0
creditMemoIds	String[]	ID of the credit memo record in <code>Draft</code> status to be posted. You can post one draft credit memo per API request.	Required	65.0

Response body for POST[Credit Memo Post](#)

Posted Invoice List Write-Off (POST)

Create credit memos with the total charge amount on the invoice as the write-off amount and close the invoice.

You can write off invoices to maintain accurate financial records and to prioritize invoices with a higher probability of payment, which is essential for compliance with accounting standards.

Special Access Rules

To use this API, you need the Billing Operations User and Credit Memo Operations User permission sets.

Resource

```
/commerce/invoicing/invoices/actions/write-off
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/commerce/invoicing/invoices/actions/write-off
```

Available version

64.0

HTTP methods

POST

Request body for POST

JSON example

```
{
  "invoices": [
    {
      "invoiceId": "3ttxx00000000cjAAA",
      "reasonCode": "Bad Debt",
      "description": "Bad Debt"
    },
    {
      "invoiceId": "3ttxx00000000cjAAA",
      "reasonCode": "Concession",
      "description": "Concession"
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
invoices	Posted Invoice Write-Off Input[]	Details of the invoices that you want to write off.	Required	64.0

Response body for POST

[Posted Invoice List Write-Off](#)

Void a Posted Invoice (POST)

Void a posted invoice to rebill the customer, if necessary.

This API request changes the invoice status from `Posted` to `Void In Progress`. The invoice remains in the `Void In Progress` status until the credit is applied and financial fields are recalculated on the invoice's related billing period items and billing schedule. The invoice status changes to `Voided` after all recalculations are completed.

Keep these considerations in mind when you use this API.

- The balance and total amount on the invoice must be equal. If these amounts aren't equal due to payments or credits, the API request fails.
- You can't call other APIs on an invoice with the `Void In Progress` status. You also can't update the invoice fields.
- You can void only the most recently posted invoice on a billing schedule.
- To void an invoice that has payments or credits, use the [Credit Memo Unapply \(POST\)](#) API.

Credit Memos

The void process creates a credit memo, which contains one credit memo line for each invoice line, including tax lines. For example, if the invoice line has a balance of US\$20, the related credit memo line has a balance of \$20. The credit memo's balance is then allocated to the invoice header's balance, reducing it to zero. A credit memo invoice application is created to record the details of the void process.

Negative Invoice Lines

If an invoice has negative invoice lines that aren't converted to a credit memo, you can use this endpoint to void the posted invoice.

Special Access Rules

You need the Void a Posted Invoice API permission set to use this API.

Resource

```
/commerce/invoicing/invoices/invoiceId/actions/void
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/commerce/invoicing/invoices/3ttbx00000000xtAAI/actions/void
```

Available version

62.0

HTTP methods

POST

Path parameter for POST

Properties

Name	Type	Description	Required or Optional	Available Version
invoiceId	String	ID of the posted invoice to be voided.	Required	62.0

Response body for POST

[Revenue Async Response](#)

Refund Line Apply (POST)

Make a refund transaction against a payment.

Resource

```
/commerce/billing/refunds/refundId/actions/apply
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/commerce/billing/refunds/0cbvc0000000G4nIAE/actions/apply
```

Available version

64.0

HTTP methods

POST

Path parameter for POST

Name	Type	Description	Required or Optional	Available Version
refundId	String	ID of the refund record.	Required	64.0

Request body for POST

JSON example

```
{
  "appliedToId": "0aQR00000004ZkKMAU",
  "amount": 10,
  "effectiveDate": "2020-08-11T07:53:15.000Z",
  "comments": "Payment application."
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
amount	Double	Amount to refund.	Required	64.0
appliedToId	String	ID of a payment or credit memo record. The refund is applied to this object.	Required	64.0
comments	String	Additional details of the refund request.	Optional	64.0
effectiveDate	String	Date from when the refund is in effect.	Optional	64.0

Response body for POST

[Refund Line Apply](#)

Send Emails for Posted Invoices (POST)

Send emails for the posted invoices of a specified invoice batch run ID.

Each email includes a custom message template in the email body and an attachment of the Invoice Document PDF. The email template is based on the user preferences defined on the Billing Profile, Legal Entity, or Billing Settings page.

Special Access Rules

Enable the **Configure Email Delivery Settings** toggle from the Billing Settings page from Setup.

Resource

```
/commerce/invoicing/invoice-batch-runs/actions/send-email
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/commerce/invoicing/invoice-batch-runs/actions/send-email
```

Available version

65.0

HTTP methods

POST

Request body for POST

JSON example

```
{
  "invoiceBatchRunId": "5IRLT000001SIJB4A4"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
invoiceBatchRunId	String	ID of the invoice batch run record to send emails for the posted invoices of an invoice batch run.	Required	65.0

Response body for POST

[Send Email Response](#)

Resume Billing (POST)

Resume billing for billing schedule groups or an account that's currently on hold.

Resource

```
/commerce/invoicing/actions/resume-billing
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/commerce/invoicing/actions/resume-billing
```

Available version

63.0

HTTP methods

POST

Request body for POST**JSON example**

```
{
  "referenceIds":
  [
    {
      "referenceId": "001DU000001o2UwYAI",
      "resumeDate": "2024-11-27"
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
referenceIds	Resume Billing Object Input[]	Input representation of the account or billing schedule group IDs to resume the billing operation for.	Required	63.0

Response body for POST[Suspend Resume Billing](#)

Suspend Billing (POST)

Suspend billing for billing schedule groups or an account for a predefined period.

Resource

```
/commerce/invoicing/actions/suspend-billing
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/commerce/invoicing/actions/suspend-billing
```

Available version

63.0

HTTP methods

POST

Request body for POST**JSON example**

```
{
  "referenceIds":
```



```
[
  {
    "referenceId": "001DU000001o2UwYAI",
    "suspendDate": "2024-11-27",
    "resumeDate": "2024-12-27"
  }
]
```

Properties

Name	Type	Description	Required or Optional	Available Version
referenceIds	Suspend Billing Object Input[]	Input representation of the account or billing schedule group IDs to suspend the billing operation for.	Required	63.0

Response body for POST

[Suspend Resume Billing](#)

Standalone Credit Memo (POST)

Create a credit memo without applying it to an invoice. You can credit the invoice at a later date.

In the API request, specify the credit memo header information, charge parameters, adjustment parameters, and tax parameters. A credit memo requires at least one credit memo line. The credit memo line can be a charge or an adjustment.

Specify the credit memo lines that you want as lists of charges and adjustments. Each credit memo line must be related to a product.

Special Access Rules

You need the Credit Memo Operations User permission set to use this API.

Resource

```
/commerce/invoicing/credit-memos/actions/generate
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/commerce/invoicing/credit-memos/actions/generate
```

Available version

62.0

HTTP methods

POST

Request body for POST

JSON example

This example shows a sample request with the Ignore tax strategy.

```
{
  "billingAccountId": "001j000000WCFB800x",
  "type": "Posted",
  "description": "Standalone credit memo with ignored tax.",
}
```

```

"currencyIsoCode": "USD",
"taxStrategy": "Ignore",
"charges": [
  {
    "chargeAmount": 100,
    "productId": "01tR0000000njDiIAI"
  }
]
}

```

This example shows a sample request with the `ManualOverride` tax strategy.

```

{
  "billingAccountId": "001DU000001nhpPYAQ",
  "description": "creditmemo-1",
  "currencyIsoCode": "USD",
  "taxStrategy": "ManualOverride",
  "charges": [
    {
      "productId": "01tDU000000EpKkYAK",
      "chargeAmount": 1000,
      "taxes": [
        {
          "taxAmount": 7.25,
          "taxCode": "CA-94121",
          "taxName": "CALIFORNIA",
          "taxRate": 0.25
        }
      ]
    }
  ]
}

```

This example shows a sample request with the `Calculate` tax strategy for a charge line.

```

{
  "billingAccountId": "001DU000001nhpPYAQ",
  "description": "Standalone Credit Memo",
  "type": "Posted",
  "currencyIsoCode": "USD",
  "taxStrategy": "Ignore",
  "charges": [
    {
      "productId": "01tR0000000njDiIAI",
      "chargeAmount": 10,
      "taxStrategy": "Calculate",
      "treatmentId": "1ttxx00000001VZAAY"
    }
  ]
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
billTo ContactId	String	Contact related to the credit memo.	Optional	62.0
billing AccountId	String	ID of the account that the credit is issued to.	Required	62.0
charges	Standalone Credit Memo Charge Input[]	Charge lines of the credit memo. Requires at least one charge line.	Required	62.0
currency IsoCode	String	ISO code currency of the new credit that's issued.	Optional	62.0
description	String	Description for the new credit that's issued.	Optional	62.0
effective Date	String	Effective date of the credit memo. If the value isn't specified, then it's null.	Optional	62.0
external Reference	String	ID of the external reference for the credit memo.	Optional	62.0
externalReference DataSource	String	Source of the external reference for the credit memo.	Optional	62.0
taxEffective Date	String	Effective date of the credit memo tax. If the value isn't specified, then it's null.	Optional	62.0
taxStrategy	String	Specifies how tax lines must be created for the standalone credit memos. Valid values are: <ul style="list-style-type: none"> • <code>Ignore</code>—Specifies that the creation of tax lines must be ignored. • <code>Manual Override</code>—Specifies that the provided tax values must be considered for taxes. • <code>Calculate</code>—Specifies that tax must be calculated by using the API. 	Required	62.0
type	String	Type of credit memo to be created. Valid value is <code>Posted</code> .	Optional	62.0

Response body for POST

[Revenue Async Response](#)

Tax Calculation (POST)

Calculate tax for a transaction.

Special Access Rules

To use this API, you need the CalculateTaxes API permission set.

Resource

```
/commerce/taxes/actions/calculate
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/commerce/taxes/actions/calculate
```

Available version

62.0

HTTP methods

POST

Request body for POST

JSON example

This example shows a tax request for a specified invoice as the reference entity.

```
{
  "addresses": {
    "billTo": {
      "street": "123 Main Street",
      "city": "Bainbridge Island",
      "state": "WA",
      "postalCode": "98110",
      "country": "US"
    },
    "soldTo": {
      "street": "123 Main Street",
      "city": "Bainbridge Island",
      "state": "WA",
      "postalCode": "98110",
      "country": "US"
    },
    "shipFrom": {
      "street": "123 Alaskan Way",
      "city": "Seattle",
      "state": "WA",
      "country": "US",
      "postalCode": "98101"
    },
    "shipTo": {
      "street": "123 Main street",
      "city": "Bainbridge Island",
      "state": "WA",
      "postalCode": "98110",
      "country": "US"
    }
  },
  "currencyIsoCode": "USD",
```

```
"customerDetails": {
  "accountId": "001xx000003HYD5AAO"
},
"description": "Monthly invoice for account 001xx000003HYEhAAO",
"documentCode": "3ttxx0000000C7d_Debit-4wAxx000000000ODEAY",
"effectiveDate": "2022-03-09T10:30:41.000Z",
"isCommit": true,
"lineItems": [
  {
    "quantity": 1,
    "amount": 100,
    "taxCode": "TX0001",
    "productCode": "Y0001",
    "productSKU": "PRES-RX-12896745",
    "description": "New Product",
    "effectiveDate": "2022-03-09T10:30:41.000Z",
    "lineNumber": "5TVxx0000004C92GAE",
    "addresses": {
      "shipFrom": {
        "street": "123 Alaskan Way",
        "city": "Seattle",
        "state": "WA",
        "country": "US",
        "postalCode": "98101",
        "latitude": 45.12,
        "longitude": 45.12
      },
      "shipTo": {
        "street": "123 Auburn Blvd",
        "city": "Sacramento",
        "state": "CA",
        "country": "US",
        "postalCode": "95841",
        "latitude": 45.12,
        "longitude": 45.12
      },
      "soldTo": {
        "street": "123 Auburn Blvd",
        "city": "Sacramento",
        "state": "CA",
        "country": "US",
        "postalCode": "95841",
        "latitude": 45.12,
        "longitude": 45.12
      },
      "billTo": {
        "street": "123 Auburn Blvd",
        "city": "Sacramento",
        "state": "CA",
        "country": "US",
        "postalCode": "95841",
        "latitude": 45.12,
        "longitude": 45.12
      }
    }
  }
]
```

```

    }
  }
],
"referenceDocumentCode" = null,
"referenceEntityId": "3ttxx0000000C7d",
"shouldVoidTax": false,
"taxEngineId": "4wAxx0000000g8v",
"taxType": "Actual",
"taxTransactionType": "Debit",
"transactionDate": "2022-03-09T10:30:41.000Z"
}

```

This example shows a tax request for a specified credit memo as the reference entity.

```

{
  "addresses": {
    "billTo": {
      "street": "123 Main Street",
      "city": "Bainbridge Island",
      "state": "WA",
      "postalCode": "98110",
      "country": "US"
    },
    "soldTo": {
      "street": "123 Main Street",
      "city": "Bainbridge Island",
      "state": "WA",
      "postalCode": "98110",
      "country": "US"
    },
    "shipFrom": {
      "street": "123 Alaskan Way",
      "city": "Seattle",
      "state": "WA",
      "country": "US",
      "postalCode": "98101"
    },
    "shipTo": {
      "street": "123 Main street",
      "city": "Bainbridge Island",
      "state": "WA",
      "postalCode": "98110",
      "country": "US"
    }
  },
  "currencyIsoCode": "USD",
  "customerDetails": {
    "accountId": "001xx000003HYD5AAO"
  },
  "description": "Monthly credit memo for account 001xx000003HYEhAAO",
  "documentCode": "50gxx000000g27KAAQ-4wAxx000000000DEAY",
  "effectiveDate": "2022-03-09T10:30:41.000Z",
  "isCommit": true,
  "lineItems": [
    {

```

```

    "quantity": 1,
    "amount": 100,
    "taxCode": "TX0001",
    "productCode": "Y0001",
    "productSKU": "PRES-RX-12896745",
    "description": "New Product",
    "effectiveDate": "2022-03-09T10:30:41.000Z",
    "lineNumber": "5TVxx0000004C92GAE",
    "addresses": {
      "shipFrom": {
        "street": "123 Alaskan Way",
        "city": "Seattle",
        "state": "WA",
        "country": "US",
        "postalCode": "98101",
        "latitude": 45.12,
        "longitude": 45.12
      },
      "shipTo": {
        "street": "123 Auburn Blvd",
        "city": "Sacramento",
        "state": "CA",
        "country": "US",
        "postalCode": "95841",
        "latitude": 45.12,
        "longitude": 45.12
      },
      "soldTo": {
        "street": "123 Auburn Blvd",
        "city": "Sacramento",
        "state": "CA",
        "country": "US",
        "postalCode": "95841",
        "latitude": 45.12,
        "longitude": 45.12
      },
      "billTo": {
        "street": "123 Auburn Blvd",
        "city": "Sacramento",
        "state": "CA",
        "country": "US",
        "postalCode": "95841",
        "latitude": 45.12,
        "longitude": 45.12
      }
    }
  },
  "referenceDocumentCode" = null,
  "referenceEntityId": "50gxx000000g27K",
  "shouldVoidTax": false,
  "taxEngineId": "4wAxx0000000g8v",
  "taxType": "Actual",
  "taxTransactionType": "Debit",

```

```
"transactionDate": "2022-03-09T10:30:41.000Z"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
addresses	Addresses	Address details for tax calculation.	Optional	62.0
currencyIsoCode	String	Currency ISO code that's used for tax calculation.	Optional	62.0
customerDetails	Customer Details	Customer details for determining the applicable tax.	Optional	62.0
description	String	Description of the tax transaction.	Optional	62.0
documentCode	String	Unique identifier for the tax document. If the <code>documentCode</code> property isn't specified, the tax engine auto-generates it.	Optional	62.0
effectiveDate	String	Date when the tax rules are applied. If a tax rate changes on a specific date, the <code>effectiveDate</code> property ensures the correct rate is applied based on the transaction's timing. For credit-based tax callouts, specify the original invoice date.	Optional	62.0
isCommit	Boolean	Indicates whether to submit the transaction to the tax engine for reporting (<code>true</code>) or not (<code>false</code>). This property value is <code>true</code> for invoices and credit memos with the <code>Posted</code> status.	Optional	62.0
lineItems	Line Item Input []	Details of the line items for calculating the applicable tax.	Required	62.0
reference DocumentCode	String	Reference document code. For subsequent transactions such as a credit tax, this property value specifies the original document code. For credit-based tax callouts, specify the original invoice ID.	Optional	62.0
reference EntityId	String	ID of the related quote, invoice, and other transaction documents.	Optional	62.0

Name	Type	Description	Required or Optional	Available Version
sellerDetails	Seller Details Input	Seller details for tax calculation.	Optional	62.0
shouldVoidTax	Boolean	<p>Indicates whether to void the tax transaction associated with a document that's mentioned as the <code>referenceDocumentCode</code> property value with <code>taxType</code> property value as <code>Actual</code> and <code>isCommit</code> property value set to <code>true</code>.</p> <p>Keep these considerations in mind when you use this property.</p> <ul style="list-style-type: none"> • If the <code>shouldVoidTax</code> property value is set to <code>true</code>, then the operation returns a response with <code>documentCode</code> property value updated to <code>referenceDocumentCode</code> property value that was originally sent in the request payload. The response also includes the <code>taxTransactionType</code> property value as <code>Void</code>. This indicates that the document specified in the <code>referenceDocumentCode</code> property value is voided. • If document is locked or you can't void the tax transaction for any reason, then you can use the Tax Calculation request to perform another transaction such as a Credit Tax request. In this scenario, the response includes the <code>documentCode</code> property value that was sent in the request payload. • If the document that's mentioned in the <code>referenceDocumentCode</code> property value isn't available in the tax engine, then an error response occurs with ResultCode on page 1107 value as <code>ReferenceDocumentCodeMissing</code>. 	Optional	65.0
taxEngineId	String	ID of the tax engine that's used to calculate tax.	Required	62.0

Name	Type	Description	Required or Optional	Available Version
tax TransactionType	String	Type of the tax transaction. Valid values are: <ul style="list-style-type: none"> <code>Debit</code>—Increases tax liability for the seller, requiring the seller to pay tax on the transaction. <code>Credit</code>—Decreases tax liability for the seller, resulting in a tax refund for the seller. <code>Void</code>—Reserved for internal use. The default value is <code>Debit</code> .	Optional	62.0
taxType	String	Type of the tax. Valid values are: <ul style="list-style-type: none"> <code>Actual</code>—Exact tax amount that's calculated based on actual sales. <code>Estimated</code>—Estimated tax amount, which is adjusted later to match actual tax calculations. For draft invoices and quote records, the tax type is marked as <code>Estimated</code> . After draft invoices are posted and the status changes to <code>Posted</code> , the tax type is updated to <code>Actual</code> . Similarly, when a quote record is finalized and converted into an actual order, the tax type is also updated to <code>Actual</code> .	Required	62.0
transactionDate	String	Date of the transaction that appears on the invoice, order, and other transaction documents.	Required	62.0

Response body for POST

[Tax Calculation](#)

Update Sequence Policy (PATCH)

Update the settings of a sequence policy that defines how unique, sequential numbers are generated by using specific patterns, values, and filters.

Special Access Rules

You need the Billing Admin permission set to use this API.

Resource

```
/connect/sequences/policy/sequencePolicyId
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v65.0/connect/sequences/policy/1Vdx000000GRNAA2
```

Available version

65.0

HTTP methods

PATCH

Request body for PATCH**JSON example**

This example shows a sample request to create a sequence policy.

```
{
  "name": "Sample Sequence Policy",
  "description": "This is a sample sequence policy.",
  "effectiveFromDateTime": "2025-08-10",
  "expirationDateTime": "2025-09-20",
  "isActive": true,
  "sequenceMode": "Basic",
  "targetObject": "Invoice",
  "dateStampFormat": "Yyyy",
  "sequenceStartNumber": 1,
  "incrementNumber": 1,
  "maximumSequenceNumber": 1000,
  "minimumSequenceNumberWidth": 2,
  "filterCriteria": "Custom",
  "selectionLogic": "selectionLogic",
  "sequencePattern": "INV-{SequenceValue}-abc",
  "selectionCondition": [
    {
      "filterField": "AppType",
      "operator": "Equals",
      "filterValue": "RLM",
      "conditionNumber": 1
    },
    {
      "filterField": "Status",
      "operator": "Equals",
      "filterValue": "Posted",
      "conditionNumber": 2
    },
    {
      "filterField": "LegalEntity",
      "operator": "Equals",
      "filterValue": "US",
      "conditionNumber": 3
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
dateStamp Format	String	Format of the stamp date that's appended to the sequence number. You can't edit this property by using the Update Sequence Policy API.	Required	65.0
description	String	Additional details about the sequence policy.	Optional	65.0
effectiveFrom DateTime	String	Date and time when the policy becomes effective. The default value is the current date.	Required	65.0
expiration DateTime	String	Date and time when the policy expires.	Optional	65.0
filter Criteria	String	Criteria to filter the target objects.	Required	65.0
increment Number	Integer	Value by which the sequence number increases until it reaches the maximum number. This value must be greater than or equal to 1. The default value is 1. You can't edit this property by using the Update Sequence Policy API.	Required	65.0
isActive	Boolean	Indicates whether the policy is active (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code> .	Required	65.0
maximumSequence Number	Integer	Maximum number the sequence number can reach.	Optional	65.0
minimumSequence NumberWidth	Integer	Minimum number of digits a sequence number must have. You can't edit this property by using the Update Sequence Policy API.	Optional	65.0
name	String	Name of the sequence policy.	Required	65.0
selection Condition	Selection Condition Input[]	Criteria to determine which sequence policy is applied to a record. This property includes conditions based on any standard or custom fields of the record.	Optional	65.0
selection Logic	String	Logic that determines the objects that the sequence policy applies to.	Optional	65.0
sequenceMode	String	Specifies how sequence numbers are generated. Valid values are:	Required	65.0

Name	Type	Description	Required or Optional	Available Version
		<ul style="list-style-type: none"> <code>Basic</code>—Assigns sequential numbers without gap reconciliation. <code>Gapless</code>—Assigns sequential numbers with gap reconciliation. The usage of this value ensures that the posted invoices don't have any numbering gaps for audits and compliance. <p>You can't edit this property by using the Update Sequence Policy API.</p>		
<code>sequencePattern</code>	String	Pattern structure that's followed for the sequence.	Required	65.0
<code>sequenceStartNumber</code>	Integer	Starting value of the sequence number, which must be greater than or equal to 0. The default value is 1. You can't edit this property by using the Update Sequence Policy API.	Required	65.0
<code>targetObject</code>	Object	Object that the policy is applied to. Valid value is <code>Invoice</code> . You can create a sequence policy for invoices only. You can't edit this property by using the Update Sequence Policy API.	Required	65.0
<code>timeZone</code>	String	Time zone that's applicable for the sequence policy.	Optional	65.0

Response body for PATCH

[Sequence Policy](#)

Request Bodies

Learn more about the available request bodies of Billing APIs.

[Address Input](#)

Input representation of the details of an address.

[Addresses Input](#)

Input representation of the details of the addresses for calculating tax.

[Batch Invoice Filter Criteria Input](#)

Input representation of the filter criteria for an invoice batch run.

[Batch Invoice Scheduler Input](#)

Input representation of the details of the request to create an invoice scheduler.

[Billing Schedule Recovery Input](#)

Input representation of the details of the billing schedules to recover the associated invoice.

[Context-Aware Billing Schedule](#)

Input representation of the billing transaction details.

[Context-Aware Standalone Billing Schedule Input](#)

Input representation of the request to create a billing schedule based on transaction details. This representation includes the transaction and context service details.

[Context-Aware Standalone Billing Schedule Metadata Input](#)

Input representation of the metadata details to create a billing schedule. This representation includes the name of the context definition and context mapping along with the mapping details of the transaction, billing schedule, and billing schedule group.

[Convert Negative Invoice Lines Input](#)

Input representation of the details of the request to convert a list of negative invoice lines into a credit.

[Credit Invoice Input](#)

Input representation of the details of the request to create a credit memo.

[Credit Invoice Line Input](#)

Input representation of the details of the invoice lines to be credited.

[Credit Invoice Line Tax Input](#)

Input representation of the details of the tax lines to be created manually for the invoice line.

[Credit Memo Addresses Input](#)

Input representation of the details of the billing and shipping addresses.

[Credit Memo Apply Input](#)

Input representation of the request to apply a credit memo to an invoice.

[Credit Memo Apply Application Input](#)

Input representation of the request to specify one or more applications to apply a credit memo for, with each application representing an invoice.

[Credit Memo Draft to Posted Input](#)

Input representation of the request to post a draft credit memo.

[Credit Memo Unapply Input](#)

Input representation of the request to unapply a credit memo from an invoice.

[Credit Memo Line Apply Input](#)

Input representation of the details of the request to apply a credit memo line to an invoice line.

[Credit Memo Line Application Input](#)

Input representation of the request to specify one or more applications to apply a credit memo line for, with each application representing an invoice line.

[Credit Memo Line Unapply Input](#)

Input representation of the details of the request to unapply a credit memo line from an invoice line.

[Customer Details Input](#)

Input representation of the customer details for tax calculation.

[Frequency Cadence Options](#)

Input representation of the frequency cadence options for an invoice scheduler.

[Graph Record for Invoice Ingestion](#)

A Graph record is an object that's a part of the graph structure, representing both the fields and relationships among different objects. Each record in the graph can contain attributes, which are fields of the object, and references to other related records.

[Invoice Draft To Posted Input](#)

Input representation of the details of the draft invoice that's posted.

[Invoice Estimated Tax Calculation Input](#)

Details of the invoice for which the estimated tax must be calculated.

[Invoice Ingestion Input](#)

Input representation of the details of the invoice to be processed. The details include the tax processing status, user preferences for tax callouts, and associated object graph representation.

[Invoice Input for Ingestion](#)

Input representation of the details of the invoice that must be generated for or ingested into Billing.

[Invoice Input](#)

Input representation of the details of the billing schedule.

[Invoice Preview Input](#)

Input representation of the details of the billing transaction that the preview invoices are generated for.

[Line Item Input](#)

Input representation of the details of the line item for tax calculation.

[Payment Line Apply Input](#)

Input representation of the payment line details. This representation covers details on allocation of a payment to a specific invoice line. It also provides additional context through optional fields such as associated account and effective date.

[Payment Line Unapply Input](#)

Input representation of the payment line details. This representation covers fields that you can specify to revert a payment line application to their preapplication state.

[Payment Run Batch Filter Criteria Input](#)

Input representation of the filter criteria for an invoice batch run. This representation covers the criteria and sequence for filtering payment run details. It specifies the field and object names, comparison operations, and values to be used for filtering.

[Payment Batch Scheduler Input](#)

Input representation of the details of the request to create a payment scheduler. This representation sets the rules and timing for a payment scheduler, including match types, dates, frequency, and filter criteria.

[Payment Scheduler Update Input](#)

Input representation of the details of the request to update the status of a payment scheduler. This representation defines the status of a payment scheduler, which can be set to Active, Canceled, Draft, or Inactive.

[Posted Invoice List Write-Off Input](#)

Input representation of the request to write off a list of posted invoices. This representation includes the details of invoices that you want to write off.

[Posted Invoice Write-Off Input](#)

Input representation of the details of the request to write off a posted invoice. This representation includes invoice details such as invoice ID and reason for writing off invoices.

[Refund Line Apply Input](#)

Input representation of the details of a transaction refund request. This representation outlines the properties of a refund, including the refund amount and ID of the payment or credit memo record that the refund is applied to.

[Resume Billing Input](#)

Input representation of the details of the request to resume the billing operation for an account or a billing schedule group.

[Resume Billing Object Input](#)

Input representation of the details such as the ID of the account or billing schedule group along with the effective date. These details are used to start the billing operation.

[Selection Condition Input](#)

Input representation of the criteria that's used to determine which sequencing policy is applied to a record. The criteria stores the conditions based on any standard or custom fields of the record.

[Seller Details Input](#)

Input representation of the seller details for tax calculation.

[Send Email Input](#)

Input representation of the request to send an email for an invoice batch run.

[Sequence Policy Input](#)

Input representation of the configured rules and properties to generate unique, sequential numbers for objects.

[Sequence Gap Reconciliation Input](#)

Input representation of the details that are used to identify and reconcile gaps in sequence values based on the sequence policy or target object.

[Sequences Assignment Input](#)

Input representation of the details of the target objects to which the sequence pattern values are assigned.

[Standalone Credit Memo Charge Input](#)

Input representation of the details of the charge lines of a credit memo.

[Standalone Credit Memo Input](#)

Input representation of the details required to create a standalone credit memo.

[Standalone Credit Memo Tax Input](#)

Input representation of the details of the tax request.

[Suspend Billing Input](#)

Input representation of the details of the request to suspend the billing operation for an account or a billing schedule group.

[Suspend Billing Object Input](#)

Input representation of the details such as the ID of the account or billing schedule group along with the effective dates. These details are used to suspend the billing operation.

[Tax Calculation Input](#)

Input representation of the details of the request to calculate tax.

[Void Posted Invoice Input](#)

Input representation of the details of the invoice to be voided.

Address Input

Input representation of the details of an address.

JSON example**JSON example**

```

"billingAddress": {
  "street": "1 Market St #300",
  "city": "San Francisco",
  "state": "CA",
  "country": "US",
  "postalCode": "94105",
  "latitude": "37.789901",
  "longitude": "-122.396923"
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
city	String	Address city.	Optional	62.0
country	String	Address country.	Optional	62.0
latitude	Double	Latitude for the address.	Optional	62.0
locationCode	String	Location code for the address.	Optional	62.0
longitude	Double	Longitude for the address.	Optional	62.0
postalCode	String	Postal code for the address.	Optional	62.0
state	String	Address state.	Optional	62.0
street	String	Address street.	Optional	62.0

Addresses Input

Input representation of the details of the addresses for calculating tax.

JSON example

```

{
  "addresses": {
    "billTo": {
      "street": "123 Main Street",
      "city": "Bainbridge Island",
      "state": "WA",
      "postalCode": "98110",
      "country": "US"
    },
    "soldTo": {
      "street": "123 Main Street",
      "city": "Bainbridge Island",
      "state": "WA",
      "postalCode": "98110",
      "country": "US"
    }
  }
}

```

```

    },
    "shipFrom": {
      "street": "123 Alaskan Way",
      "city": "Seattle",
      "state": "WA",
      "country": "US",
      "postalCode": "98101"
    },
    "shipTo": {
      "street": "123 Main street",
      "city": "Bainbridge Island",
      "state": "WA",
      "postalCode": "98110",
      "country": "US"
    }
  }
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
billTo	Address Input	Billing address of the item.	Optional	62.0
shipFrom	Address Input	Address that the item is shipped from.	Optional	62.0
shipTo	Address Input	Address that the item is shipped to.	Required	62.0
soldTo	Address Input	Address of the entity that the item is sold to.	Optional	62.0

Batch Invoice Filter Criteria Input

Input representation of the filter criteria for an invoice batch run.

JSON example

```

"filterCriteria": [
  {
    "operation": "InList",
    "value": "Batch 2, Batch 3, Batch 4",
    "criteriaSequence": 1,
    "objectName": "BillingSchedule",
    "fieldName": "InvoiceRunMatchingValue"
  },
  {
    "operation": "Equals",
    "value": "001xx000003GZG5AAO",
    "criteriaSequence": 2,
    "objectName": "BillingSchedule",
    "fieldName": "BillingAccount"
  },
  {
    "operation": "Equals",

```

```

    "value": "0fwxx000000001AAA",
    "criteriaSequence": 3,
    "objectName": "BillingScheduleGroup",
    "fieldName": "LegalEntity"
  },
  {
    "operation": "InList",
    "value": "OneTime,Recurring",
    "criteriaSequence": 4,
    "objectName": "BillingSchedule",
    "fieldName": "BillingTermUnit"
  },
  {
    "operation": "Equals",
    "value": "USD",
    "criteriaSequence": 5,
    "objectName": "BillingSchedule",
    "fieldName": "Currency_Iso_code"
  }
]

```

Properties

Name	Type	Description	Required or Optional	Available Version
fieldName	String	Name of the field that this filter is applicable for. Valid values are: <ul style="list-style-type: none"> • Currency_Iso_code—If multiple currencies are enabled for the org, then this value is required. • InvoiceRunMatchingValue • BillingAccount • LegalEntity • BillingTermUnit 	Required	62.0
objectName	Object	Name of the object that the filter is applicable for. Valid values are: <ul style="list-style-type: none"> • BillingSchedule • BillingScheduleGroup 	Required	62.0
operation	String	Operation to be performed for comparison. Valid values are: <ul style="list-style-type: none"> • Equals • InList—This value supports only the InvoiceRunMatchingValue and BillingTermUnit fields with API version 62.0 and later. In addition, 	Required	62.0

Name	Type	Description	Required or Optional	Available Version
		<p>this value supports the CurrencyIsoCode field with API version 63.0 and later.</p> <ul style="list-style-type: none"> NotEquals 		
value	String	Value for the filter criteria.	Required	62.0

Batch Invoice Scheduler Input

Input representation of the details of the request to create an invoice scheduler.

JSON example

This example shows a sample request to create an invoice scheduler that generates invoices once.

```
{
  "schedulerName": "InvoiceScheduler",
  "startDate": "2024-05-06",
  "invoiceStatus": "POSTED",
  "preferredTime": "00:45",
  "targetDate": "2024-05-22",
  "invoiceDate": "2024-05-22",
  "frequencyCadence": "Once",
  "frequencyCadenceOptions": {},
  "timezone": "Asia/Kolkata",
  "status": "Active",
  "filterCriteria": [
    {
      "operation": "InList",
      "value": "Batch 2, Batch 3, Batch 4",
      "criteriaSequence": 1,
      "objectName": "BillingSchedule",
      "fieldName": "InvoiceRunMatchingValue"
    },
    {
      "operation": "Equals",
      "value": "001xx000003GZG5AAO",
      "criteriaSequence": 2,
      "objectName": "BillingSchedule",
      "fieldName": "BillingAccount"
    },
    {
      "operation": "Equals",
      "value": "0fwxx0000000001AAA",
      "criteriaSequence": 3,
      "objectName": "BillingScheduleGroup",
      "fieldName": "LegalEntity"
    },
    {
      "operation": "InList",
      "value": "OneTime, Recurring",

```

```

        "criteriaSequence": 4,
        "objectName": "BillingSchedule",
        "fieldName": "BillingTermUnit"
    },
    {
        "operation": "Equals",
        "value": "USD",
        "criteriaSequence": 5,
        "objectName": "BillingSchedule",
        "fieldName": "Currency_Iso_code"
    }
]
}

```

This example shows a sample request to create an invoice scheduler that generates invoices daily.

```

{
  "schedulerName": "InvoiceScheduler",
  "startDate": "2024-05-06",
  "endDate": "2026-05-06",
  "invoiceStatus": "POSTED",
  "preferredTime": "00:45",
  "targetDateOffset": 0,
  "invoiceDateOffset": 0,
  "isInvoiceDateFromRunDate": true,
  "frequencyCadence": "Daily",
  "frequencyCadenceOptions": {},
  "timezone": "Asia/Kolkata",
  "status": "Active",
  "filterCriteria": [
    {
      "operation": "InList",
      "value": "Batch 2, Batch 3, Batch 4",
      "criteriaSequence": 1,
      "objectName": "BillingSchedule",
      "fieldName": "InvoiceRunMatchingValue"
    },
    {
      "operation": "Equals",
      "value": "001xx000003GZG5AAO",
      "criteriaSequence": 2,
      "objectName": "BillingSchedule",
      "fieldName": "BillingAccount"
    },
    {
      "operation": "Equals",
      "value": "0fwxx0000000001AAA",
      "criteriaSequence": 3,
      "objectName": "BillingScheduleGroup",
      "fieldName": "LegalEntity"
    },
    {
      "operation": "InList",
      "value": "OneTime, Recurring",
      "criteriaSequence": 4,

```

```

    "objectName": "BillingSchedule",
    "fieldName": "BillingTermUnit"
  },
  {
    "operation": "InList",
    "value": "USD",
    "criteriaSequence": 5,
    "objectName": "BillingSchedule",
    "fieldName": "Currency_Iso_code"
  }
]
}

```

This example shows a sample request to create an invoice scheduler that generates invoices weekly.

```

{
  "schedulerName": "InvoiceScheduler",
  "startDate": "2024-05-06",
  "endDate": "2026-05-06",
  "invoiceStatus": "POSTED",
  "preferredTime": "00:45",
  "targetDateOffset": 0,
  "invoiceDateOffset": 0,
  "isInvoiceDateFromRunDate": false,
  "frequencyCadence": "Weekly",
  "frequencyCadenceOptions": {
    "recursOnDay": "Sunday"
  },
  "timezone": "Asia/Kolkata",
  "status": "Active",
  "filterCriteria": [
    {
      "operation": "InList",
      "value": "Batch 2, Batch 3, Batch 4",
      "criteriaSequence": 1,
      "objectName": "BillingSchedule",
      "fieldName": "InvoiceRunMatchingValue"
    },
    {
      "operation": "Equals",
      "value": "001xx000003GZG5AAO",
      "criteriaSequence": 2,
      "objectName": "BillingSchedule",
      "fieldName": "BillingAccount"
    },
    {
      "operation": "Equals",
      "value": "0fwxx0000000001AAA",
      "criteriaSequence": 3,
      "objectName": "BillingScheduleGroup",
      "fieldName": "LegalEntity"
    },
    {
      "operation": "InList",
      "value": "OneTime, Recurring",

```

```

        "criteriaSequence": 4,
        "objectName": "BillingSchedule",
        "fieldName": "BillingTermUnit"
    },
    {
        "operation": "Equals",
        "value": "USD",
        "criteriaSequence": 5,
        "objectName": "BillingSchedule",
        "fieldName": "Currency_Iso_code"
    }
]
}

```

This example shows a sample request to create an invoice scheduler that generates invoices monthly on a specific date.

```

{
  "schedulerName": "InvoiceScheduler",
  "startDate": "2024-05-06",
  "endDate": "2026-05-06",
  "invoiceStatus": "POSTED",
  "preferredTime": "00:45",
  "targetDateOffset": 0,
  "invoiceDateOffset": 0,
  "isInvoiceDateFromRunDate": false,
  "frequencyCadence": "Monthly",
  "frequencyCadenceOptions": {
    "recurringSubType": "SpecificDate",
    "recursOnDate": "L-1",
    "shouldExcludeWkendAndHldy": true
  },
  "timezone": "Asia/Kolkata",
  "status": "Active",
  "filterCriteria": [
    {
      "operation": "InList",
      "value": "Batch 2, Batch 3, Batch 4",
      "criteriaSequence": 1,
      "objectName": "BillingSchedule",
      "fieldName": "InvoiceRunMatchingValue"
    },
    {
      "operation": "Equals",
      "value": "001xx000003GZG5AAO",
      "criteriaSequence": 2,
      "objectName": "BillingSchedule",
      "fieldName": "BillingAccount"
    },
    {
      "operation": "Equals",
      "value": "0fwxx0000000001AAA",
      "criteriaSequence": 3,
      "objectName": "BillingScheduleGroup",
      "fieldName": "LegalEntity"
    }
  ],
}

```

```

{
  "operation": "InList",
  "value": "OneTime,Recurring",
  "criteriaSequence": 4,
  "objectName": "BillingSchedule",
  "fieldName": "BillingTermUnit"
},
{
  "operation": "Equals",
  "value": "USD",
  "criteriaSequence": 5,
  "objectName": "BillingSchedule",
  "fieldName": "Currency_Iso_code"
}
]
}

```

This example shows a sample request to create an invoice scheduler that runs immediately.

```

{
  "schedulerName": "InvoiceScheduler",
  "status": "Draft",
  "invoiceStatus": "Posted",
  "frequencyCadenceOptions": {
    "shouldStartRunImmediately": true
  },
  "frequencyCadence": "Once",
  "targetDate": "2024-08-28",
  "invoiceDate": "2024-08-28",
  "filterCriteria": [
    {
      "operation": "InList",
      "value": "Batch 2,Batch 3,Batch 4",
      "criteriaSequence": 1,
      "objectName": "BillingSchedule",
      "fieldName": "InvoiceRunMatchingValue"
    },
    {
      "operation": "Equals",
      "value": "001xx000003GZG5AAO",
      "criteriaSequence": 2,
      "objectName": "BillingSchedule",
      "fieldName": "BillingAccount"
    },
    {
      "operation": "Equals",
      "value": "0fwxx0000000001AAA",
      "criteriaSequence": 3,
      "objectName": "BillingScheduleGroup",
      "fieldName": "LegalEntity"
    },
    {
      "operation": "InList",
      "value": "OneTime,Recurring",
      "criteriaSequence": 4,

```



```

        "objectName": "BillingSchedule",
        "fieldName": "BillingTermUnit"
    },
    {
        "operation": "Equals",
        "value": "USD",
        "criteriaSequence": 5,
        "objectName": "BillingSchedule",
        "fieldName": "Currency_Iso_code"
    }
]
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
endDate	String	End date of the invoice scheduler.	Optional	63.0
filter Criteria	Batch Invoice Filter Criteria Input[]	List of line items of the filter criteria.	Optional	62.0
frequency Cadence	String	Frequency to run the invoice scheduler. Valid values are: <ul style="list-style-type: none"> Once Daily Weekly Monthly 	Required	62.0
frequency Cadence Options	Frequency Cadence Options	Frequency cadence options for the invoice scheduler.	Required	62.0
invoiceDate	String	Date shown on the invoice. This date is also used for tax calculations.	Required if the <code>frequency Cadence</code> property is set to <code>Once</code> .	62.0
invoiceDate Offset	Integer	Offset applied to the target date, which is the number of days added to or subtracted from the invoice date, to calculate the updated invoice date.	Required if the <code>frequency Cadence</code> property is set to <code>Daily</code> , <code>Weekly</code> , or <code>Monthly</code> .	62.0
invoiceStatus	String	Status of the invoice that specifies the expected invoice status from an invoice batch run. Valid values are: <ul style="list-style-type: none"> Draft 	Required	62.0

Name	Type	Description	Required or Optional	Available Version
		<ul style="list-style-type: none"> Posted 		
isInvoiceDateFromRunDate	Boolean	Indicates whether the invoice date is applicable from the date when the invoice scheduler is run (<code>true</code>) or not (<code>false</code>).	Optional	63.0
preferredTime	String	Preferred time for the invoice batch run.	Required	62.0
schedulerName	String	Name of the invoice scheduler, which must be unique in your org.	Required	62.0
startDate	String	Start date of the invoice scheduler.	Required	62.0
status	String	Status of the invoice scheduler. Valid values are: <ul style="list-style-type: none"> Draft Active Inactive 	Required	62.0
targetDate	String	Target date of the invoice batch run. Billing schedules having the next billing date before this date are picked up for invoicing. The target date must be less than or equal to the maximum allowed target date for the org.	Required if the <code>frequencyCadence</code> property is set to <code>Once</code> .	62.0
targetDateOffset	Integer	Target date offset applied to the next invoice run date to calculate the target date. The offset is the number of days added to or subtracted from the next billing date.	Required if the <code>frequencyCadence</code> property is set to <code>Daily</code> , <code>Weekly</code> , or <code>Monthly</code> .	62.0
timezone	String	Time zone that's applicable for the invoice scheduler.	Optional	62.0

Billing Schedule Recovery Input

Input representation of the details of the billing schedules to recover the associated invoice.

JSON example

```
{
  "billingScheduleIds": ["44bDU000000000XXYAY"]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
billingScheduleIds	String[]	IDs of the billing schedules to recover the invoice for. You can recover one billing schedule per API request.	Required	62.0

Context-Aware Billing Schedule

Input representation of the billing transaction details.

JSON example

```
{
  "billingTransactionIds": [ "801xx000003H1H9AAK" ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
billingTransactionIds	String[]	<p>ID of the billing transaction. This property value is the ID of the order if the source of the billing request is for the Order object.</p> <p>If the order product associated with the specified order ID doesn't have an associated billing treatment ID, the API considers the default billing treatment ID. The generated billing schedule group has the default billing treatment ID.</p> <p>The API supports only one billing transaction ID in the input.</p>	Required	62.0

Context-Aware Standalone Billing Schedule Input

Input representation of the request to create a billing schedule based on transaction details. This representation includes the transaction and context service details.

The Create Standalone Billing Schedules (POST) API uses the StandaloneBillingContext context definition to hydrate the context of the transaction. The context definition includes these mappings.

- The TransactionMapping maps the fields of the transaction to the attributes of the Transaction node.
- The BSGEntitiesMapping maps the attributes of the Billing Schedule node, the Billing Schedule Group node, and Billing Schedule Group Relationship node to the fields of the corresponding Salesforce objects.

For the StandaloneBillingContext context definition to hydrate all the required data, transaction data for the mandatory context tags are required. Here are the topics that mention the mandatory and optional tags, sample transaction details, and sample payloads for various types of transactions.

- [One-Time New Sale Transaction](#) on page 1913
- [Term-Defined New Sale Transaction](#) on page 1920
- [Evergreen New Sale Transaction](#) on page 1927
- [New Sale Transaction With Bundled Products](#) on page 1934
- [New Sale Transaction With Ramped Products](#) on page 1943
- [New Sale Transaction With Usage Products](#) on page 1950
- [Amended Transaction](#) on page 1957
- [Renewal Transaction](#) on page 1964
- [Early Renewal Transaction](#) on page 1971
- [Canceled Transaction](#) on page 1979

JSON example

```
{
  "transactionDetails": "{ \"nodeName\": [{ \"id\": \"001SG000004Fv1GYAS\" ,
  \"businessSubjectType\": \"Account\" , \"Quantity\": \"4\" , \"Name\": \"TestAccount\" } ] }",
  "transactionContextDetails": {
    "contextDefinitionName": "StandaloneBillingContext",
    "intraContextCustomMappingName": "CustomContextMapping",
    "readContextMappingName": "OrderTransactionMapping",
    "saveContextMappingName": "BSGEntitiesMapping"
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
transactionContextDetails	Context-Aware Standalone Billing Schedule Metadata Input[]	<p>Details of the context definition and its mappings that are used to hydrate the transaction data and save it in the appropriate Billing fields.</p> <p>The API request supports a single mapping ID. You can send separate requests for line items and line details by using their respective mapping IDs. However, this approach can result in duplicate billing schedules for the same line items and line details.</p>	Required	64.0
transactionDetails	String	Input JSON data that includes the ID of the transaction record for which the billing schedule must be created and other additional transaction details.	Required	64.0

[One-Time New Sale Transaction](#)

Understand the required values and key considerations before you create a billing schedule for a new sale transaction with the OneTime selling model type.

[Term-Defined New Sale Transaction](#)

Understand the required values and key considerations before you create a billing schedule for a new sale transaction with the TermDefined selling model type.

[Evergreen New Sale Transaction](#)

Understand the required values and key considerations before you create a billing schedule for a new sale transaction with the Evergreen selling model type.

[New Sale Transaction With Bundled Products](#)

Understand the required values and key considerations before you create a billing schedule for a new sale transaction with bundled products.

[New Sale Transaction With Ramped Products](#)

Understand the required values and key considerations before you create a billing schedule for a new sale transaction with ramped products.

[New Sale Transaction With Usage Products](#)

Understand the required values and key considerations before you create a billing schedule for a new sale transaction with usage-based products.

[Amended Transaction](#)

Understand the required values and key considerations before you create a billing schedule for an amended transaction.

[Renewal Transaction](#)

Understand the required values and key considerations before you create a billing schedule for a renewal transaction.

[Early Renewal Transaction](#)

Understand the required values and key considerations before you create a billing schedule for an early renewal transaction.

[Canceled Transaction](#)

Understand the required values and key considerations before you create a billing schedule for a canceled transaction.

One-Time New Sale Transaction

Understand the required values and key considerations before you create a billing schedule for a new sale transaction with the OneTime selling model type.

When you're creating a billing schedule for a new sale transaction with the OneTime selling model type, make sure that you specify the required values in the `transactionDetails` property value.

Context Tag in the Transaction Node of the StandaloneBillingContext Context Definition	Description	Mapped Field	Required or Optional
<code>BillToContactId__std</code>	The ID of the Contact record that's related to the transaction.	BillToContactId field on the BillingScheduleGroup object	Required
<code>ParentTransactionId__std</code>	The ID of the parent transaction record. For example, if the transaction is at a level similar to that of an	If the transaction is a child Order or Quote record,	Optional

Context Tag in the Transaction Node of the StandaloneBillingContext Context Definition	Description	Mapped Field	Required or Optional
	Order Item record, the parent transaction will be at a level similar to that of an Order record.	the ReferenceEntityId field on the BillingScheduleobject is populated. For other sObject records or external records, the Reference field on the BillingSchedule object is populated.	
AccountId__std	The ID of the Account record that's related to the transaction.	BillingAccountId field on the BillingScheduleGroup object	Required
BillingProfileId__std	The ID of the billing profile (Billing Account record) that's related to the transaction. See Billing Profile requirements.	BillingAccountId field on the BillingSchedule object	Optional
BillingState__std	The state in the billing address of the transaction.	BillingState field on the BillingScheduleGroup object	Any one of the billing address fields is required.
BillingCity__std	The city in the billing address of the transaction.	BillingCity field on the BillingScheduleGroup object	Any one of the billing address fields is required.
BillingStreet__std	The street in the billing address of the transaction.	BillingStreet field on the BillingScheduleGroup object	Any one of the billing address fields is required.
BillingPostalCode__std	The postal code in the billing address of the transaction.	BillingPostalCode field on the BillingScheduleGroup object	Any one of the billing address fields is required.
BillingCountry__std	The country in the billing address of the transaction.	BillingCountry field on the BillingScheduleGroup object	Any one of the billing address fields is required.
ShippingCity__std	The city in the shipping address of the transaction.	ShippingCity field on the BillingScheduleGroup object	Any one of the shipping address fields is required.
ShippingStreet__std	The street in the shipping address of the transaction.	ShippingStreet field on the BillingScheduleGroup object	Any one of the shipping address fields is required.

Context Tag in the Transaction Node of the StandaloneBillingContext Context Definition	Description	Mapped Field	Required or Optional
ShippingCountry__std	The country in the shipping address of the transaction.	ShippingCountry field on the BillingScheduleGroup object	Any one of the shipping address fields is required.
ShippingState__std	The state in the shipping address of the transaction.	ShippingState field on the BillingScheduleGroup object	Any one of the shipping address fields is required.
ShippingPostalCode__std	The postal code in the shipping address of the transaction.	ShippingPostalCode field on the BillingScheduleGroup object	Any one of the shipping address fields is required.
SavedPaymentMethodId__std	The ID of the Saved Payment Method record that's used to pay for the invoice that's generated for the transaction.	SavedPaymentMethodId field on the BillingScheduleGroup object	Optional
PaymentTermId__std	The ID of the Payment Term record that's related to the transaction.	PaymentTermId field on the BillingScheduleGroup object	Optional
SellingModelType__std	The selling model type indicates whether the transaction is for a one-time product, a term-defined product, or an evergreen product. Specify <code>OneTime</code> as the SellingModelType for the transaction that's related to a product that's sold once.	BillingMethod on the BillingSchedule object is populated as OrderAmount.	Required
TransactionId__std	The ID of the transaction that you want to create a billing schedule for.	If the transaction is an OrderItem, OrderItemAdjustmentLineItem, OrderItemDetail, QuoteLineDetail, or QuoteLineItem record, the ReferenceEntityItemId field on the BillingSchedule object is populated. For other sObject records or external records, the ReferenceItem field on the BillingSchedule object is populated.	Required

Context Tag in the Transaction Node of the StandaloneBillingContext Context Definition	Description	Mapped Field	Required or Optional
ProductName__std	The name of the product that's related to the transaction that you want to create a billing schedule for.	ProductName field on the BillingScheduleGroup object	Either the ProductName or the ProductId is required
ProductId__std	The ID of the product that's related to the transaction that you want to create a billing schedule for.	Product2Id field on the BillingScheduleGroup object	Either the ProductName or the ProductId is required
LegalEntityId__std	The legal entity of your company that the transaction comes under. If you don't specify a LegalEntityId, the org-default LegalEntityId is considered.	LegalEntityId field on the BillingScheduleGroup object	Required
PeriodBoundary__std	The period boundary determines the start and end date of the billing period. Valid values are: <ul style="list-style-type: none"> AlignToCalendar Anniversary DayOfPeriod LastDayOfPeriod 	PeriodBoundary field on the BillingScheduleGroup object	Optional
BillingDayOfMonth__std	The day of the month on which a recurring billing process is scheduled to occur for the transaction.	BillDayOfMonth field on the BillingScheduleGroup object	Optional
BillingStartMonth__std	The month when billing begins for an annual subscription. This value can be any number from 1 through 12. For example, if billing starts in January, the value is 1. If billing starts in June, the value is 6.	BillingStartMonth field on the BillingScheduleGroup object	Optional
UnitOfMeasureId__std	The ID of the Unit of Measure record that's used to define the unit for the quantity of the transaction.	UnitOfMeasureId field on the BillingSchedule object	Optional
EndDate__std	The end date of the transaction.	BillingScheduleEndDate field on the BillingSchedule object	Optional
StartDate__std	The start date of the transaction.	BillingScheduleStartDate field on the BillingSchedule object	Required
Quantity__std	The quantity of the transaction.	Quantity field on the BillingSchedule object	Required

Context Tag in the Transaction Node of the StandaloneBillingContext Context Definition	Description	Mapped Field	Required or Optional
TaxTreatmentId__std	The ID of the tax treatment that's used to calculate tax for the transaction. If you don't specify a TaxTreatmentId, the org-default TaxTreatmentId is considered.	TaxTreatmentId field on the BillingScheduleGroup object	Required
BillingTermUnit__std	The unit of measurement of the billing term. Valid values are: <ul style="list-style-type: none"> • Month • Quarter • Semi-Annual • Year 	BillingTermUnit field on the BillingSchedule object	Optional
BillingTreatmentId__std	The ID of the billing treatment that's used to create the billing schedule for the transaction. If you don't specify a BillingTreatmentId, the org-default BillingTreatmentId is considered.	BillingTreatmentId field on the BillingScheduleGroup object	Required
CurrencyIsoCode__std	The currency code of the transaction amount if your Salesforce org has multi-currency enabled.	CurrencyIsoCode field on the BillingScheduleGroup object	Required for Salesforce orgs with multiple currencies enabled
RelatedTransactionId__std	The ID of the transaction that's related to the original transaction. This value isn't required for new sale transactions.	This value isn't populated on any BillingSchedule or BillingScheduleGroup field.	Optional
RampIdentifier__std	When the transaction is part of a ramp deal, the RampIdentifier value is a unique identifier for that ramp. All the transactions with the same RampIdentifier value are grouped to have billing schedules for the same billing schedule group.	This value isn't populated on any BillingSchedule or BillingScheduleGroup field.	Optional
ProrationPolicy__std	The ID of the Proration Policy record that's related to the Product Selling Model Option record of the transaction.	ProrationPolicyId field on the BillingScheduleGroup object	Optional
BillingActionType__std	The action that you want to perform for the transaction. Valid value is Add.	Category field on the BillingSchedule object is populated as Original.	Required
UnitPrice__std	The unit price of the transaction.	UnitPrice field on the BillingSchedule object	Required
TotalPrice__std	The total price of the transaction.	TotalAmount field on the BillingSchedule object	Required

Context Tag in the Transaction Node of the StandaloneBillingContext Context Definition	Description	Mapped Field	Required or Optional
<code>ProductUsageModelType_std</code>	The type of usage model for the transaction product or service. Valid values are: <ul style="list-style-type: none"> <code>Anchor</code>—Anchor is the main subscription product or service. <code>Pack</code>—Pack is the add-on product or service that grants additional usage resources for consumption. 	BillingMethod value field on the BillingSchedule object is populated as OrderAmount.	Optional
<code>NetUnitPrice_std</code>	The net unit price of the transaction.	NetUnitPrice field on the BillingSchedule object	Optional
<code>BindingInstance_std</code>	The ID of the Asset record or custom object record that's related to the transaction.	BindingInstanceId on the BillingScheduleGroup object	Optional
<code>InvoiceRunMatchingValue_std</code>	The batch value that's used to group the billing schedule that's created for the transaction with other billing schedules with the same value. This way, the same invoice run can process these schedules. During an invoice run, billing schedules with the same batch value, including null, are grouped to be processed by the same invoice run.	InvoiceRunMatchingValue field on the BillingSchedule object	Optional
<code>ReferenceRecordId_std</code>	The ID of the Asset record that's related to the transaction.	ReferenceRecordId field on the BillingScheduleGroup object	Optional
<code>CustomInvoiceGroupKey_std</code>	When you want to generate a consolidated invoice for multiple transactions, specify the same CustomInvoiceGroupKey for all these transactions. This key is used to group these transactions together and generate a consolidated invoice for all of them.	CustomInvoiceGroupKey field on the BillingScheduleGroup object	Optional
<code>MainTransactionId_std</code>	When your transaction is part of a bundle, this value is the ID of the main transaction record for all the child transactions.	MainBsgId field on the BsgRelationship object	Optional
<code>AssociatedTransactionId_std</code>	When your transaction is part of a bundle, this value is the ID of the child transaction record.	AssociatedBsgId field on the BsgRelationship object	Optional
<code>MainTransactionRole_std</code>	When your transaction is part of a bundle, this value is the role of the primary transaction in the bundle relationship. Valid values are:	MainBsgRole field on the BsgRelationship object	Optional

Context Tag in the Transaction Node of the StandaloneBillingContext Context Definition	Description	Mapped Field	Required or Optional
	<ul style="list-style-type: none"> AddOn Bundle Set 		
<code>AssociatedTransactionRole__std</code>	When your transaction is part of a bundle, this value is the role of the child transaction in the bundle relationship. Valid values are: <ul style="list-style-type: none"> BundleComponent ClassificationComponent 	AssociatedBsgRole field on the BsgRelationship object	Optional
<code>AssociatedTransactionPricing__std</code>	When your transaction is part of a bundle, this value describes how the child transaction is priced in relation to the primary transaction. Valid values are: <ul style="list-style-type: none"> IncludedInBundlePrice NotIncludedInBundlePrice 	AssociatedBsgPricing field on the BsgRelationship object	Optional
<code>ProductRelationshipTypeId__std</code>	The ID of the Product Relationship Type record that defines the relationship between the primary and child transactions.	ProductRelationshipTypeId field on the BsgRelationship object	Optional

Considerations

Keep these important considerations in mind when you provide the details for new sale transactions with the OneTime selling model type.

- The `BillingActionType__std` value for any new sale transaction must be `Add`.
- When a new sale transaction is for the OneTime selling model type, the `SellingModelType` value must be `OneTime`.
- If you don't provide the `TaxTreatmentId__std` value, the `BillingTreatmentId__std` value, or the `LegalEntityId__std` value, the default `TaxTreatmentId` for the transaction, `BillingTreatmentId`, and `LegalEntityId` of your Salesforce org is considered. If your org doesn't have any default values, an error occurs.
- If your transaction is for an sObject record, only specify the record ID as the `id` value in the `transactionDetails` property value. All the other transaction details are automatically fetched from the sObject record if those details are mapped in the context definition.

JSON example

This example includes the transaction data for a new sale transaction with the OneTime selling model type.

```
{
  "Transaction": [
    {
      "id": "ot1",
      "SellingModelType__std": "OneTime",

```

```

    "ParentTransactionId__std": "sample",
    "TransactionId__std": "ot1",
    "ProductName__std": "OneTimeProduct",
    "StartDate__std": "2025-02-20",
    "UnitPrice__std": 10,
    "Quantity__std": 5,
    "TotalPrice__std": 50,
    "TaxTreatmentId__std": "1ttLT000000EV7DYAW",
    "BillingTreatmentId__std": "1BTLT00000008yT4AQ",
    "AccountId__std": "001LT00000dPVr1YAG",
    "BillingProfileId__std": "001LT00000dPVr1YAG",
    "BillingCity__std": "HYD",
    "ShippingCity__std": "VSKP",
    "BillingActionType__std": "Add",
    "CurrencyIsoCode__std": "USD",
    "Transaction_Make__c": "3001",
    "Transaction_Color__c": "Blue"
  }
]
}

```

This example shows the request payload to create a billing schedule for a new sale transaction with the OneTime selling model type.

```

{
  "transactionDetails":
  "ParentTransactionId__std": "sample",
  "TransactionId__std": "ot1",
  "ProductName__std": "OneTimeProduct",
  "StartDate__std": "2025-02-20",
  "UnitPrice__std": 10,
  "Quantity__std": 5,
  "TotalPrice__std": 50,
  "TaxTreatmentId__std": "1ttLT000000EV7DYAW",
  "BillingTreatmentId__std": "1BTLT00000008yT4AQ",
  "AccountId__std": "001LT00000dPVr1YAG",
  "BillingProfileId__std": "001LT00000dPVr1YAG",
  "BillingCity__std": "HYD",
  "ShippingCity__std": "VSKP",
  "BillingActionType__std": "Add",
  "CurrencyIsoCode__std": "USD",
  "Transaction_Make__c": "3001",
  "Transaction_Color__c": "Blue"
  "transactionContextDetails": {
    "contextDefinitionName": "StandaloneBillingContext__stdctx",
    "intraContextCustomMappingName": "CustomContextMapping",
    "readContextMappingName": "TransactionMapping",
    "saveContextMappingName": "BSGEntitiesMapping"
  }
}

```

SEE ALSO:

[BillingSchedule](#)

[BillingScheduleGroup](#)

[BsgRelationship](#)

Term-Defined New Sale Transaction

Understand the required values and key considerations before you create a billing schedule for a new sale transaction with the TermDefined selling model type.

When you're creating a billing schedule for a new sale transaction with the TermDefined selling model type, make sure that you specify the mandatory values in the `transactionDetails` property value.

Context Tag in the Transaction Node of the StandaloneBillingContext Context Definition	Description	Mapped Field	Required or Optional
BillToContactId__std	The ID of the Contact record that's related to the transaction.	BillToContactId field on the BillingScheduleGroup object	Required
ParentTransactionId__std	The ID of the parent transaction record. For example, if the transaction is at a level similar to that of an Order Item record, the parent transaction will be at a level similar to that of an Order record.	If the transaction is a child Order or Quote record, the ReferenceEntityId field on the BillingScheduleobject is populated. For other sObject records or external records, the Reference field on the BillingSchedule object is populated.	Required
AccountId__std	The ID of the Account record that's related to the transaction.	BillingAccountId field on the BillingScheduleGroup object	Required
BillingProfileId__std	The ID of the billing profile (Billing Account record) that's related to the transaction. See Billing Profile requirements.	BillingAccountId field on the BillingSchedule object	Optional
BillingState__std	The state in the billing address of the transaction.	BillingState field on the BillingScheduleGroup object	Any one of the billing address fields is required.
BillingCity__std	The city in the billing address of the transaction.	BillingCity field on the BillingScheduleGroup object	Any one of the billing address fields is required.
BillingStreet__std	The street in the billing address of the transaction.	BillingStreet field on the BillingScheduleGroup object	Any one of the billing address fields is required.
BillingPostalCode__std	The postal code in the billing address of the transaction.	BillingPostalCode field on the BillingScheduleGroup object	Any one of the billing address fields is required.
BillingCountry__std	The country in the billing address of the transaction.	BillingCountry field on the BillingScheduleGroup object	Any one of the billing address fields is required.
ShippingCity__std	The city in the shipping address of the transaction.	ShippingCity field on the BillingScheduleGroup object	Any one of the shipping address fields is required.

Context Tag in the Transaction Node of the StandaloneBillingContext Context Definition	Description	Mapped Field	Required or Optional
ShippingStreet__std	The street in the shipping address of the transaction.	ShippingStreet field on the BillingScheduleGroup object	Any one of the shipping address fields is required.
ShippingCountry__std	The country in the shipping address of the transaction.	ShippingCountry field on the BillingScheduleGroup object	Any one of the shipping address fields is required.
ShippingState__std	The state in the shipping address of the transaction.	ShippingState field on the BillingScheduleGroup object	Any one of the shipping address fields is required.
ShippingPostalCode__std	The postal code in the shipping address of the transaction.	ShippingPostalCode field on the BillingScheduleGroup object	Any one of the shipping address fields is required.
SavedPaymentMethodId__std	The ID of the Saved Payment Method record that's used to pay for the invoice that's generated for the transaction.	SavedPaymentMethodId field on the BillingScheduleGroup object	Optional
PaymentTermId__std	The ID of the Payment Term record that's related to the transaction.	PaymentTermId field on the BillingScheduleGroup object	Optional
SellingModelType__std	The selling model type indicates whether the transaction is for a one-time product, a term-defined product, or an evergreen product. Specify <code>TermDefined</code> as the <code>SellingModelType</code> for the transaction that's related to a product that's sold for a specific term.	BillingMethod on the BillingSchedule object is populated as <code>OrderAmount</code> .	Required
TransactionId__std	The ID of the transaction that you want to create a billing schedule for.	If the transaction is an <code>OrderItem</code> , <code>OrderItemAdjustmentLineItem</code> , <code>OrderItemDetail</code> , <code>QuoteLineDetail</code> , or <code>QuoteLineItem</code> record, the <code>ReferenceEntityItem</code> field on the <code>BillingSchedule</code> object is populated. For other <code>sObject</code> records or external records, the <code>ReferenceItem</code> field on	Required

Context Tag in the Transaction Node of the StandaloneBillingContext Context Definition	Description	Mapped Field	Required or Optional
		the BillingSchedule object is populated.	
ProductName__std	The name of the product that's related to the transaction that you want to create a billing schedule for.	ProductName field on the BillingScheduleGroup object	Either the ProductName or the ProductId is required
ProductId__std	The ID of the product that's related to the transaction that you want to create a billing schedule for.	Product2Id field on the BillingScheduleGroup object	Either the ProductName or the ProductId is required
LegalEntityId__std	The legal entity of your company that the transaction comes under. If you don't specify a LegalEntityId, the org-default LegalEntityId is considered.	LegalEntityId field on the BillingScheduleGroup object	Optional
PeriodBoundary__std	The period boundary determines the start and end date of the billing period. Valid values are: <ul style="list-style-type: none"> AlignToCalendar Anniversary DayOfPeriod LastDayOfPeriod 	PeriodBoundary field on the BillingScheduleGroup object	Required
BillingDayOfMonth__std	The day of the month on which a recurring billing process is scheduled to occur for the transaction.	BillDayOfMonth field on the BillingScheduleGroup object	Required
BillingStartMonth__std	The month when billing begins for an annual subscription. This value can be any number from 1 through 12. For example, if billing starts in January, the value is 1. If billing starts in June, the value is 6.	BillingStartMonth field on the BillingScheduleGroup object	Optional
UnitOfMeasureId__std	The ID of the Unit of Measure record that's used to define the unit for the quantity of the transaction.	UnitOfMeasureId field on the BillingSchedule object	Optional
EndDate__std	The end date of the transaction.	BillingScheduleEndDate field on the BillingSchedule object	Required
StartDate__std	The start date of the transaction.	BillingScheduleStartDate field on the BillingSchedule object	Required
Quantity__std	The quantity of the transaction.	Quantity field on the BillingSchedule object	Required

Context Tag in the Transaction Node of the StandaloneBillingContext Context Definition	Description	Mapped Field	Required or Optional
TaxTreatmentId__std	The ID of the tax treatment that's used to calculate tax for the transaction. If you don't specify a TaxTreatmentId, the org-default TaxTreatmentId is considered.	TaxTreatmentId field on the BillingScheduleGroup object	Required
BillingTermUnit__std	The unit of measurement of the billing term. Valid values are: <ul style="list-style-type: none"> • Month • Quarter • Semi-Annual • Year 	BillingTermUnit field on the BillingSchedule object	Required
BillingTreatmentId__std	The ID of the billing treatment that's used to create the billing schedule for the transaction. If you don't specify a BillingTreatmentId, the org-default BillingTreatmentId is considered.	BillingTreatmentId field on the BillingScheduleGroup object	Required
CurrencyIsoCode__std	The currency code of the transaction amount if your Salesforce org has multi-currency enabled.	CurrencyIsoCode field on the BillingScheduleGroup object	Required for Salesforce orgs with multiple currencies enabled
RelatedTransactionId__std	The ID of the transaction that's related to the original transaction. This value isn't required for new sale transactions.	This value isn't populated on any BillingSchedule or BillingScheduleGroup field.	Optional
RampIdentifier__std	When the transaction is part of a ramp deal, the RampIdentifier value is a unique identifier for that ramp. All the transactions with the same RampIdentifier value are grouped to have billing schedules for the same billing schedule group.	This value isn't populated on any BillingSchedule or BillingScheduleGroup field.	Optional
ProrationPolicy__std	The ID of the Proration Policy record that's related to the Product Selling Model Option record of the transaction.	ProrationPolicyId field on the BillingScheduleGroup object	Optional
BillingActionType__std	The action that you want to perform for the transaction. Valid value is Add.	Category field on the BillingSchedule object is populated as Original.	Required
UnitPrice__std	The unit price of the transaction.	UnitPrice field on the BillingSchedule object	Required
TotalPrice__std	The total cost to the customer for the transaction, from the start date to the end date.	TotalAmount field on the BillingSchedule object	Required

Context Tag in the Transaction Node of the StandaloneBillingContext Definition	Description	Mapped Field	Required or Optional
<code>ProductUsageModelType_std</code>	The type of usage model for the transaction product or service. Valid values are: <ul style="list-style-type: none"> <code>Anchor</code>—Anchor is the main subscription product or service. <code>Pack</code>—Pack is the add-on product or service that grants additional usage resources for consumption. 	BillingMethod value field on the BillingSchedule object is populated as OrderAmount.	Optional
<code>NetUnitPrice_std</code>	The net unit price of the transaction.	NetUnitPrice field on the BillingSchedule object	Optional
<code>BindingInstance_std</code>	The ID of the Asset record or custom object record that's related to the transaction.	BindingInstanceId on the BillingScheduleGroup object	Optional
<code>InvoiceRunMatchingValue_std</code>	The batch value that's used to group the billing schedule that's created for the transaction with other billing schedules with the same value. This way, the same invoice run can process these schedules. During an invoice run, billing schedules with the same batch value, including null, are grouped to be processed by the same invoice run.	InvoiceRunMatchingValue field on the BillingSchedule object	Optional
<code>ReferenceRecordId_std</code>	The ID of the Asset record that's related to the transaction.	ReferenceRecordId field on the BillingScheduleGroup object	Optional
<code>CustomInvoiceGroupKey_std</code>	When you want to generate a consolidated invoice for multiple transactions, specify the same CustomInvoiceGroupKey for all these transactions. This key is used to group these transactions together and generate a consolidated invoice for all of them.	CustomInvoiceGroupKey field on the BillingScheduleGroup object	Optional
<code>MainTransactionId_std</code>	When your transaction is part of a bundle, this value is the ID of the main transaction record for all the child transactions.	MainBsgId field on the BsgRelationship object	Optional
<code>AssociatedTransactionId_std</code>	When your transaction is part of a bundle, this value is the ID of the child transaction record.	AssociatedBsgId field on the BsgRelationship object	Optional
<code>MainTransactionRole_std</code>	When your transaction is part of a bundle, this value is the role of the primary transaction in the bundle relationship. Valid values are:	MainBsgRole field on the BsgRelationship object	Optional

Context Tag in the Transaction Node of the StandaloneBillingContext Context Definition	Description	Mapped Field	Required or Optional
	<ul style="list-style-type: none"> AddOn Bundle Set 		
<code>AssociatedTransactionRole__std</code>	When your transaction is part of a bundle, this value is the role of the child transaction in the bundle relationship. Valid values are: <ul style="list-style-type: none"> BundleComponent ClassificationComponent 	AssociatedBsgRole field on the BsgRelationship object	Optional
<code>AssociatedTransactionPricing__std</code>	When your transaction is part of a bundle, this value describes how the child transaction is priced in relation to the primary transaction. Valid values are: <ul style="list-style-type: none"> IncludedInBundlePrice NotIncludedInBundlePrice 	AssociatedBsgPricing field on the BsgRelationship object	Optional
<code>ProductRelationshipTypeId__std</code>	The ID of the Product Relationship Type record that defines the relationship between the primary and child transactions.	ProductRelationshipTypeId field on the BsgRelationship object	Optional

Considerations

Keep these important considerations in mind when you provide the details for new sale transactions with the TermDefined selling model type.

- The `BillingActionType__std` value for any new sale transaction must be `Add`.
- When a new sale transaction is for the TermDefined selling model type, the `SellingModelType` value must be `TermDefined`.
- When a new sale transaction is for the TermDefined selling model type, the `BillingTermUnit__std` and `PeriodBoundary__std` values are required.
- If you don't provide the `TaxTreatmentId__std` value, the `BillingTreatmentId__std` value, or the `LegalEntityId__std` value for the transaction, the default `TaxTreatmentId`, `BillingTreatmentId`, and `LegalEntityId` of your Salesforce org is considered. If your org doesn't have any default values, an error occurs.
- If your transaction is for an sObject record, only specify the record ID as the `id` value in the `transactionDetails` property value. All the other transaction details are automatically fetched from the sObject record if those details are mapped in the context definition.

JSON example

This example includes the transaction data for a new sale transaction with the TermDefined selling model type.

```
{
  "Transaction": [
    {
      "id": "ter1",
```


Context Tag in the Transaction Node of the StandaloneBillingContext Context Definition	Description	Mapped Field	Required or Optional
BillToContactId__std	The ID of the Contact record that's related to the transaction.	BillToContactId field on the BillingScheduleGroup object	Required
ParentTransactionId__std	The ID of the parent transaction record. For example, if the transaction is at a level similar to that of an Order Item record, the parent transaction will be at a level similar to that of an Order record.	If the transaction is a child Order or Quote record, the ReferenceEntityId field on the BillingScheduleobject is populated. For other sObject records or external records, the Reference field on the BillingSchedule object is populated.	Optional
AccountId__std	The ID of the Account record that's related to the transaction.	BillingAccountId field on the BillingScheduleGroup object	Required
BillingProfileId__std	The ID of the billing profile (Billing Account record) that's related to the transaction. See Billing Profile requirements.	BillingAccountId field on the BillingSchedule object	Optional
BillingState__std	The state in the billing address of the transaction.	BillingState field on the BillingScheduleGroup object	Any one of the billing address fields is required.
BillingCity__std	The city in the billing address of the transaction.	BillingCity field on the BillingScheduleGroup object	Any one of the billing address fields is required.
BillingStreet__std	The street in the billing address of the transaction.	BillingStreet field on the BillingScheduleGroup object	Any one of the billing address fields is required.
BillingPostalCode__std	The postal code in the billing address of the transaction.	BillingPostalCode field on the BillingScheduleGroup object	Any one of the billing address fields is required.
BillingCountry__std	The country in the billing address of the transaction.	BillingCountry field on the BillingScheduleGroup object	Any one of the billing address fields is required.
ShippingCity__std	The city in the shipping address of the transaction.	ShippingCity field on the BillingScheduleGroup object	Any one of the shipping address fields is required.

Context Tag in the Transaction Node of the StandaloneBillingContext Context Definition	Description	Mapped Field	Required or Optional
ShippingStreet__std	The street in the shipping address of the transaction.	ShippingStreet field on the BillingScheduleGroup object	Any one of the shipping address fields is required.
ShippingCountry__std	The country in the shipping address of the transaction.	ShippingCountry field on the BillingScheduleGroup object	Any one of the shipping address fields is required.
ShippingState__std	The state in the shipping address of the transaction.	ShippingState field on the BillingScheduleGroup object	Any one of the shipping address fields is required.
ShippingPostalCode__std	The postal code in the shipping address of the transaction.	ShippingPostalCode field on the BillingScheduleGroup object	Any one of the shipping address fields is required.
SavedPaymentMethodId	The ID of the Saved Payment Method record that's used to pay for the invoice that's generated for the transaction.	SavedPaymentMethodId field on the BillingScheduleGroup object	Optional
PaymentTermId__std	The ID of the Payment Term record that's related to the transaction.	PaymentTermId field on the BillingScheduleGroup object	Optional
SellingModelType__std	The selling model type indicates whether the transaction is for a one-time product, a term-defined product, or an evergreen product. Specify Evergreen as the SellingModelType for the transaction that's related to a product that's sold for an indefinite term.	BillingMethod on the BillingSchedule object is populated as OrderAmount.	Required
TransactionId__std	The ID of the transaction that you want to create a billing schedule for.	If the transaction is an OrderItem, OrderItemAdjustmentLineItem, OrderItemDetail, QuoteLineDetail, or QuoteLineItem record, the ReferenceEntityItemId field on the BillingSchedule object is populated. For other sObject records or external records, the ReferenceItem field on	Required

Context Tag in the Transaction Node of the StandaloneBillingContext Context Definition	Description	Mapped Field	Required or Optional
		the BillingSchedule object is populated.	
ProductName__std	The name of the product that's related to the transaction that you want to create a billing schedule for.	ProductName field on the BillingScheduleGroup object	Either the ProductName or the ProductId is required
ProductId__std	The ID of the product that's related to the transaction that you want to create a billing schedule for.	Product2Id field on the BillingScheduleGroup object	Either the ProductName or the ProductId is required
LegalEntityId__std	The legal entity of your company that the transaction comes under. If you don't specify a LegalEntityId, the org-default LegalEntityId is considered.	LegalEntityId field on the BillingScheduleGroup object	Required
PeriodBoundary__std	The period boundary determines the start and end date of the billing period. Valid values are: <ul style="list-style-type: none"> AlignToCalendar Anniversary DayOfPeriod LastDayOfPeriod 	PeriodBoundary field on the BillingScheduleGroup object	Required
BillingDayOfMonth__std	The day of the month on which a recurring billing process is scheduled to occur for the transaction.	BillDayOfMonth field on the BillingScheduleGroup object	Required
BillingStartMonth__std	The month when billing begins for an annual subscription. This value can be any number from 1 through 12. For example, if billing starts in January, the value is 1. If billing starts in June, the value is 6.	BillingStartMonth field on the BillingScheduleGroup object	Required
UnitOfMeasureId__std	The ID of the Unit of Measure record that's used to define the unit for the quantity of the transaction.	UnitOfMeasureId field on the BillingSchedule object	Optional
EndDate__std	The end date of the transaction.	BillingScheduleEndDate field on the BillingSchedule object	Optional
StartDate__std	The start date of the transaction.	BillingScheduleStartDate field on the BillingSchedule object	Required
Quantity__std	The quantity of the transaction.	Quantity field on the BillingSchedule object	Required

Context Tag in the Transaction Node of the StandaloneBillingContext Context Definition	Description	Mapped Field	Required or Optional
TaxTreatmentId__std	The ID of the tax treatment that's used to calculate tax for the transaction. If you don't specify a TaxTreatmentId, the org-default TaxTreatmentId is considered.	TaxTreatmentId field on the BillingScheduleGroup object	Required
BillingTermUnit__std	The unit of measurement of the billing term. Valid values are: <ul style="list-style-type: none"> • Month • Quarter • Semi-Annual • Year 	BillingTermUnit field on the BillingSchedule object	Required
BillingTreatmentId__std	The ID of the billing treatment that's used to create the billing schedule for the transaction. If you don't specify a BillingTreatmentId, the org-default BillingTreatmentId is considered.	BillingTreatmentId field on the BillingScheduleGroup object	Required
CurrencyIsoCode__std	The currency code of the transaction amount if your Salesforce org has multi-currency enabled.	CurrencyIsoCode field on the BillingScheduleGroup object	Required for Salesforce orgs with multiple currencies enabled
RelatedTransactionId__std	The ID of the transaction that's related to the original transaction. This value isn't required for new sale transactions.	This value isn't populated on any BillingSchedule or BillingScheduleGroup field.	Optional
RampIdentifier__std	When the transaction is part of a ramp deal, the RampIdentifier value is a unique identifier for that ramp. All the transactions with the same RampIdentifier value are grouped to have billing schedules for the same billing schedule group.	This value isn't populated on any BillingSchedule or BillingScheduleGroup field.	Optional
ProrationPolicy__std	The ID of the Proration Policy record that's related to the Product Selling Model Option record of the transaction.	ProrationPolicyId field on the BillingScheduleGroup object	Optional
BillingActionType__std	The action that you want to perform for the transaction. Valid value is Add.	Category field on the BillingSchedule object is populated as Original.	Required
UnitPrice__std	The unit price of the transaction.	UnitPrice field on the BillingSchedule object	Required
TotalPrice__std	The total cost to the customer for the transaction for each billing period, such as month, quarter, or year, based on the billing frequency.	TotalAmount field on the BillingSchedule object	Required

Context Tag in the Transaction Node of the StandaloneBillingContext Definition	Description	Mapped Field	Required or Optional
<code>ProductUsageModelType_std</code>	The type of usage model for the transaction product or service. Valid values are: <ul style="list-style-type: none"> <code>Anchor</code>—Anchor is the main subscription product or service. <code>Pack</code>—Pack is the add-on product or service that grants additional usage resources for consumption. 	BillingMethod value field on the BillingSchedule object is populated as OrderAmount.	Optional
<code>NetUnitPrice_std</code>	The net unit price of the transaction.	NetUnitPrice field on the BillingSchedule object	Optional
<code>BindingInstance_std</code>	The ID of the Asset record or custom object record that's related to the transaction.	BindingInstanceid on the BillingScheduleGroup object	Optional
<code>InvoiceRunMatchingValue_std</code>	The batch value that's used to group the billing schedule that's created for the transaction with other billing schedules with the same value. This way, the same invoice run can process these schedules. During an invoice run, billing schedules with the same batch value, including null, are grouped to be processed by the same invoice run.	InvoiceRunMatchingValue field on the BillingSchedule object	Optional
<code>ReferenceRecordId_std</code>	The ID of the Asset record that's related to the transaction.	ReferenceRecordId field on the BillingScheduleGroup object	Optional
<code>CustomInvoiceGroupKey_std</code>	When you want to generate a consolidated invoice for multiple transactions, specify the same CustomInvoiceGroupKey for all these transactions. This key is used to group these transactions together and generate a consolidated invoice for all of them.	CustomInvoiceGroupKey field on the BillingScheduleGroup object	Optional
<code>MainTransactionId_std</code>	When your transaction is part of a bundle, this value is the ID of the main transaction record for all the child transactions.	MainBsgId field on the BsgRelationship object	Optional
<code>AssociatedTransactionId_std</code>	When your transaction is part of a bundle, this value is the ID of the child transaction record.	AssociatedBsgId field on the BsgRelationship object	Optional
<code>MainTransactionRole_std</code>	When your transaction is part of a bundle, this value is the role of the primary transaction in the bundle relationship. Valid values are:	MainBsgRole field on the BsgRelationship object	Optional

Context Tag in the Transaction Node of the StandaloneBillingContext Context Definition	Description	Mapped Field	Required or Optional
	<ul style="list-style-type: none"> AddOn Bundle Set 		
<code>AssociatedTransactionRole__std</code>	When your transaction is part of a bundle, this value is the role of the child transaction in the bundle relationship. Valid values are: <ul style="list-style-type: none"> BundleComponent ClassificationComponent 	AssociatedBsgRole field on the BsgRelationship object	Optional
<code>AssociatedTransactionPricing__std</code>	When your transaction is part of a bundle, this value describes how the child transaction is priced in relation to the primary transaction. Valid values are: <ul style="list-style-type: none"> IncludedInBundlePrice NotIncludedInBundlePrice 	AssociatedBsgPricing field on the BsgRelationship object	Optional
<code>ProductRelationshipTypeId__std</code>	The ID of the Product Relationship Type record that defines the relationship between the primary and child transactions.	ProductRelationshipTypeId field on the BsgRelationship object	Optional

Considerations

Keep these important considerations in mind when you provide the details for new sale transactions with the Evergreen selling model type.

- The `BillingActionType__std` value for any new sale transaction must be `Add`.
- When a new sale transaction is for the Evergreen selling model type, the `SellingModelType` value must be `Evergreen`.
- When a new sale transaction is for the Evergreen selling model type, the `BillingTermUnit` and `PeriodBoundary` values are required.
- If you don't provide the `TaxTreatmentId__std` value, the `BillingTreatmentId__std` value, or the `LegalEntityId__std` value for the transaction, the default `TaxTreatmentId`, `BillingTreatmentId`, and `LegalEntityId` of your Salesforce org is considered. If your org doesn't have any default values, an error occurs.
- If your transaction is for an sObject record, only specify the record ID as the `id` value in the `transactionDetails` property value. All the other transaction details are automatically fetched from the sObject record if those details are mapped in the context definition.

JSON example

This example includes the transaction data for a new sale transaction with the Evergreen selling model type.

```
{
  "Transaction": [
    {
      "id": "evg1",
      "SellingModelType__std": "Evergreen",

```

```

    "ParentTransactionId__std": "sample",
    "TransactionId__std": "evgl",
    "ProductName__std": "EvergreenSemiAnnualProduct",
    "StartDate__std": "2025-01-01",
    "PeriodBoundary__std": "DayOfPeriod",
    "BillingDayOfMonth__std": 1,
    "BillingStartMonth__std": 3,
    "UnitPrice__std": 10,
    "Quantity__std": 1,
    "TotalPrice__std": 10,
    "TaxTreatmentId__std": "1ttLT000000EV7DYAW",
    "BillingTreatmentId__std": "1BTLT00000008yT4AQ",
    "AccountId__std": "001LT00000dPVrlyAG",
    "BillingProfileId__std": "001LT00000dPVrlyAG",
    "BillingCity__std": "HYD",
    "ShippingCity__std": "VSKP",
    "BillingTermUnit__std": "Semi-Annual",
    "BillingActionType__std": "Add",
    "CurrencyIsoCode__std": "USD",
    "Transaction_Make__c": "3001",
    "Transaction_Color__c": "Blue"
  }
]
}

```

This example shows the request payload to create a billing schedule for a new sale transaction with the Evergreen selling model type.

```

{
  "transactionDetails":
  "transactionContextDetails": {
    "transactionContextDetails": {
      "contextDefinitionName": "StandaloneBillingContext__stdctx",
      "intraContextCustomMappingName": "CustomContextMapping",
      "readContextMappingName": "TransactionMapping",
      "saveContextMappingName": "BSGEntitiesMapping"
    }
  }
}

```

SEE ALSO:

[BillingSchedule](#)

[BillingScheduleGroup](#)

[BsgRelationship](#)

New Sale Transaction With Bundled Products

Understand the required values and key considerations before you create a billing schedule for a new sale transaction with bundled products.

When you're creating a billing schedule for a new sale transaction with bundled products, make sure that you specify the mandatory values in the `transactionDetails` property value.

Context Tag in the Transaction Node of the StandaloneBillingContext Context Definition	Description	Mapped Field	Required or Optional
BillToContactId__std	The ID of the Contact record that's related to the transaction.	BillToContactId field on the BillingScheduleGroup object	Required
ParentTransactionId__std	The ID of the parent transaction record. For example, if the transaction is at a level similar to that of an Order Item record, the parent transaction will be at a level similar to that of an Order record.	If the transaction is a child Order or Quote record, the ReferenceEntityId field on the BillingScheduleobject is populated. For other sObject records or external records, the Reference field on the BillingSchedule object is populated.	Optional
AccountId__std	The ID of the Account record that's related to the transaction.	BillingAccountId field on the BillingScheduleGroup object	Required
BillingProfileId__std	The ID of the billing profile (Billing Account record) that's related to the transaction. See Billing Profile requirements.	BillingAccountId field on the BillingSchedule object	Optional
BillingState__std	The state in the billing address of the transaction.	BillingState field on the BillingScheduleGroup object	Any one of the billing address fields is required.
BillingCity__std	The city in the billing address of the transaction.	BillingCity field on the BillingScheduleGroup object	Any one of the billing address fields is required.
BillingStreet__std	The street in the billing address of the transaction.	BillingStreet field on the BillingScheduleGroup object	Any one of the billing address fields is required.
BillingPostalCode__std	The postal code in the billing address of the transaction.	BillingPostalCode field on the BillingScheduleGroup object	Any one of the billing address fields is required.
BillingCountry__std	The country in the billing address of the transaction.	BillingCountry field on the BillingScheduleGroup object	Any one of the billing address fields is required.
ShippingCity__std	The city in the shipping address of the transaction.	ShippingCity field on the BillingScheduleGroup object	Any one of the shipping address fields is required.

Context Tag in the Transaction Node of the StandaloneBillingContext Context Definition	Description	Mapped Field	Required or Optional
ShippingStreet__std	The street in the shipping address of the transaction.	ShippingStreet field on the BillingScheduleGroup object	Any one of the shipping address fields is required.
ShippingCountry__std	The country in the shipping address of the transaction.	ShippingCountry field on the BillingScheduleGroup object	Any one of the shipping address fields is required.
ShippingState__std	The state in the shipping address of the transaction.	ShippingState field on the BillingScheduleGroup object	Any one of the shipping address fields is required.
ShippingPostalCode__std	The postal code in the shipping address of the transaction.	ShippingPostalCode field on the BillingScheduleGroup object	Any one of the shipping address fields is required.
SavedPaymentMethodId__std	The ID of the Saved Payment Method record that's used to pay for the invoice that's generated for the transaction.	SavedPaymentMethodId field on the BillingScheduleGroup object	Optional
PaymentTermId__std	The ID of the Payment Term record that's related to the transaction.	PaymentTermId field on the BillingScheduleGroup object	Optional
SellingModelType__std	The selling model type indicates whether the transaction is for a one-time product, a term-defined product, or an evergreen product. Specify <code>OneTime</code> as the <code>SellingModelType</code> for the transaction that's related to a product that's sold once.	BillingMethod on the BillingSchedule object is populated as <code>OrderAmount</code> .	Required
TransactionId__std	The ID of the transaction that you want to create a billing schedule for.	If the transaction is an <code>OrderItem</code> , <code>OrderItemAdjustmentLineItem</code> , <code>OrderItemDetail</code> , <code>QuoteLineDetail</code> , or <code>QuoteLineItem</code> record, the <code>ReferenceEntityItemId</code> field on the <code>BillingSchedule</code> object is populated. For other <code>sObject</code> records or external records, the <code>ReferenceItem</code> field on	Required

Context Tag in the Transaction Node of the StandaloneBillingContext Context Definition	Description	Mapped Field	Required or Optional
		the BillingSchedule object is populated.	
ProductName__std	The name of the product that's related to the transaction that you want to create a billing schedule for.	ProductName field on the BillingScheduleGroup object	Either the ProductName or the ProductId is required
ProductId__std	The ID of the product that's related to the transaction that you want to create a billing schedule for.	Product2Id field on the BillingScheduleGroup object	Either the ProductName or the ProductId is required
LegalEntityId__std	The legal entity of your company that the transaction comes under. If you don't specify a LegalEntityId, the org-default LegalEntityId is considered.	LegalEntityId field on the BillingScheduleGroup object	Required
PeriodBoundary__std	The period boundary determines the start and end date of the billing period. Valid values are: <ul style="list-style-type: none"> AlignToCalendar Anniversary DayOfPeriod LastDayOfPeriod 	PeriodBoundary field on the BillingScheduleGroup object	Required for child products with the TermDefined or Evergreen selling model types.
BillingDayOfMonth__std	The day of the month on which a recurring billing process is scheduled to occur for the transaction.	BillDayOfMonth field on the BillingScheduleGroup object	Required for child products with the TermDefined or Evergreen selling model types.
BillingStartMonth__std	The month when billing begins for an annual subscription. This value can be any number from 1 through 12. For example, if billing starts in January, the value is 1. If billing starts in June, the value is 6.	BillingStartMonth field on the BillingScheduleGroup object	Required for child products with the Evergreen selling model type.
UnitOfMeasureId__std	The ID of the Unit of Measure record that's used to define the unit for the quantity of the transaction.	UnitOfMeasureId field on the BillingSchedule object	Optional
EndDate__std	The end date of the transaction.	BillingScheduleEndDate field on the BillingSchedule object	Required for child products with the TermDefined selling model type.
StartDate__std	The start date of the transaction.	BillingScheduleStartDate field on the BillingSchedule object	Required

Context Tag in the Transaction Node of the StandaloneBillingContext Context Definition	Description	Mapped Field	Required or Optional
Quantity__std	The quantity of the transaction.	Quantity field on the BillingSchedule object	Required
TaxTreatmentId__std	The ID of the tax treatment that's used to calculate tax for the transaction. If you don't specify a TaxTreatmentId, the org-default TaxTreatmentId is considered.	TaxTreatmentId field on the BillingScheduleGroup object	Required
BillingTermUnit__std	The unit of measurement of the billing term. Valid values are: <ul style="list-style-type: none"> • Month • Quarter • Semi-Annual • Year 	BillingTermUnit field on the BillingSchedule object	Required for child products with the TermDefined or Evergreen selling model types.
BillingTreatmentId__std	The ID of the billing treatment that's used to create the billing schedule for the transaction. If you don't specify a BillingTreatmentId, the org-default BillingTreatmentId is considered.	BillingTreatmentId field on the BillingScheduleGroup object	Required
CurrencyIsoCode__std	The currency code of the transaction amount if your Salesforce org has multi-currency enabled.	CurrencyIsoCode field on the BillingScheduleGroup object	Required for Salesforce orgs with multiple currencies enabled .
RelatedTransactionId__std	The ID of the transaction that's related to the original transaction. This value isn't required for new sale transactions.	This value isn't populated on any BillingSchedule or BillingScheduleGroup field.	Optional
RampIdentifier__std	When the transaction is part of a ramp deal, the RampIdentifier value is a unique identifier for that ramp. All the transactions with the same RampIdentifier value are grouped to have billing schedules for the same billing schedule group.	This value isn't populated on any BillingSchedule or BillingScheduleGroup field.	Optional
ProrationPolicy__std	The ID of the Proration Policy record that's related to the Product Selling Model Option record of the transaction.	ProrationPolicyId field on the BillingScheduleGroup object	Optional
BillingActionType__std	The action that you want to perform for the transaction. Valid value is Add.	Category field on the BillingSchedule object is populated as Original.	Required
UnitPrice__std	The unit price of the transaction.	UnitPrice field on the BillingSchedule object	Required

Context Tag in the Transaction Node of the StandaloneBillingContext Context Definition	Description	Mapped Field	Required or Optional
TotalPrice__std	The total price of the transaction.	TotalAmount field on the BillingSchedule object	Required
ProductUsageModelType__std	The type of usage model for the transaction product or service. Valid values are: <ul style="list-style-type: none"> Anchor—Anchor is the main subscription product or service. Pack—Pack is the add-on product or service that grants additional usage resources for consumption. 	BillingMethod value field on the BillingSchedule object is populated as OrderAmount.	Optional
NetUnitPrice__std	The net unit price of the transaction.	NetUnitPrice field on the BillingSchedule object	Optional
BindingInstance__std	The ID of the Asset record or custom object record that's related to the transaction.	BindingInstanceId on the BillingScheduleGroup object	Optional
InvoiceRunMatchingValue__std	The batch value that's used to group the billing schedule that's created for the transaction with other billing schedules with the same value. This way, the same invoice run can process these schedules. During an invoice run, billing schedules with the same batch value, including null, are grouped to be processed by the same invoice run.	InvoiceRunMatchingValue field on the BillingSchedule object	Optional
ReferenceRecordId__std	The ID of the Asset record that's related to the transaction.	ReferenceRecordId field on the BillingScheduleGroup object	Optional
CustomInvoiceGroupKey__std	When you want to generate a consolidated invoice for multiple transactions, specify the same CustomInvoiceGroupKey for all these transactions. This key is used to group these transactions together and generate a consolidated invoice for all of them.	CustomInvoiceGroupKey field on the BillingScheduleGroup object	Optional
MainTransactionId__std	When your transaction is part of a bundle, this value is the ID of the main transaction record for all the child transactions.	MainBsgId field on the BsgRelationship object	Required for all the child products.
AssociatedTransactionId__std	When your transaction is part of a bundle, this value is the ID of the child transaction record.	AssociatedBsgId field on the BsgRelationship object	Optional

Context Tag in the Transaction Node of the StandaloneBillingContext Context Definition	Description	Mapped Field	Required or Optional
<code>MainTransactionRole__std</code>	When your transaction is part of a bundle, this value is the role of the primary transaction in the bundle relationship. Valid values are: <ul style="list-style-type: none"> • AddOn • Bundle • Set 	MainBsgRole field on the BsgRelationship object	Required for all the child products.
<code>AssociatedTransactionRole__std</code>	When your transaction is part of a bundle, this value is the role of the child transaction in the bundle relationship. Valid values are: <ul style="list-style-type: none"> • • BundleComponent • ClassificationComponent 	AssociatedBsgRole field on the BsgRelationship object	Required for all the child products.
<code>AssociatedTransactionPricing__std</code>	When your transaction is part of a bundle, this value describes how the child transaction is priced in relation to the primary transaction. Valid values are: <ul style="list-style-type: none"> • IncludedInBundlePrice • NotIncludedInBundlePrice 	AssociatedBsgPricing field on the BsgRelationship object	Required for all the child products.
<code>ProductRelationshipTypeId__std</code>	The ID of the Product Relationship Type record that defines the relationship between the primary and child transactions.	ProductRelationshipTypeId field on the the BsgRelationship object	Optional

Considerations

Keep these important considerations in mind when you provide the details for new sale transactions with bundled products.

- The `BillingActionType__std` value for any new sale transaction must be `Add`.
- For new sale transactions with bundled products, the `MainTransactionId__std` value is required for all the child transactions.
- If you don't provide the `TaxTreatmentId__std` value, the `BillingTreatmentId__std` value, or the `LegalEntityId__std` value for the transaction, the default `TaxTreatmentId`, `BillingTreatmentId`, and `LegalEntityId` of your Salesforce org is considered. If your org doesn't have any default values, an error occurs.
- If your transaction is for an sObject record, only specify the record ID as the `id` value in the `transactionDetails` property value. All the other transaction details are automatically fetched from the sObject record if those details are mapped in the context definition.
- To understand the requirements for the various selling model types, see these resources.
 - [One-Time New Sale Transaction](#) on page 1913
 - [Term-Defined New Sale Transaction](#) on page 1920
 - [Evergreen New Sale Transaction](#) on page 1927

JSON example

This sample is for a new sale transaction for bundled products with two levels of nesting and with these selling model types.

- The main root product's selling model type is `OneTime`.
- The second root product's selling model type is `OneTime`.
- The child products' selling model types are `TermDefined` and `Evergreen`.

```
{
  "Transaction": [
    {
      "id": "sample1",
      "SellingModelType__std": "OneTime",
      "ParentTransactionId__std": "sample",
      "TransactionId__std": "sample1",
      "ProductName__std": "OneTimeProduct",
      "StartDate__std": "2025-02-20",
      "UnitPrice__std": 10,
      "Quantity__std": 1,
      "TotalPrice__std": 10,
      "TaxTreatmentId__std": "1ttLT000000EV7DYAW",
      "BillingTreatmentId__std": "1BTLT00000008yT4AQ",
      "AccountId__std": "001LT00000dPVrlyAG",
      "BillToContactId__std": "003LT0000038bALYAY",
      "BillingCity__std": "HYD",
      "ShippingCity__std": "VSKP",
      "BillingActionType__std": "Add",
      "CurrencyIsoCode__std": "USD",
      "Transaction_Make__c": "3001",
      "Transaction_Color__c": "Blue"
    },
    {
      "id": "sample2",
      "SellingModelType__std": "OneTime",
      "ParentTransactionId__std": "abc",
      "TransactionId__std": "sample2",
      "ProductName__std": "OneTimeProduct",
      "StartDate__std": "2025-02-20",
      "UnitPrice__std": 10,
      "Quantity__std": 1,
      "TotalPrice__std": 10,
      "TaxTreatmentId__std": "1ttLT000000EV7DYAW",
      "BillingTreatmentId__std": "1BTLT00000008yT4AQ",
      "AccountId__std": "001LT00000dPVrlyAG",
      "BillToContactId__std": "003LT0000038bALYAY",
      "BillingActionType__std": "Add",
      "CurrencyIsoCode__std": "USD",
      "BillingCity__std": "HYD",
      "ShippingCity__std": "VSKP",
      "AssociatedTransactionPricing__std": "IncludedInBundlePrice",
      "MainTransactionRole__std": "Bundle",
      "AssociatedTransactionRole__std": "BundleComponent",
      "MainTransactionId__std": "sample1"
    }
  ]
}
```

```

    "id": "sample3",
    "SellingModelType__std": "TermDefined",
    "ParentTransactionId__std": "sample",
    "TransactionId__std": "sample3",
    "ProductName__std": "TermedQuarterlyProduct",
    "StartDate__std": "2025-01-01",
    "EndDate__std": "2025-12-31",
    "PeriodBoundary__std": "DayOfPeriod",
    "BillingDayOfMonth__std": 1,
    "BillingStartMonth__std": 2,
    "UnitPrice__std": 10,
    "Quantity__std": 1,
    "TotalPrice__std": 120,
    "TaxTreatmentId__std": "1ttLT000000EV7DYAW",
    "BillingTreatmentId__std": "1BTLT00000008yT4AQ",
    "AccountId__std": "001LT00000dPVrLYAG",
    "BillToContactId__std": "003LT0000038bALYAY",
    "BillingTermUnit__std": "Quarter",
    "BillingActionType__std": "Add",
    "CurrencyIsoCode__std": "USD",
    "BillingCity__std": "HYD",
    "ShippingCity__std": "VSKP",
    "AssociatedTransactionPricing__std": "IncludedInBundlePrice",
    "MainTransactionRole__std": "Bundle",
    "AssociatedTransactionRole__std": "BundleComponent",
    "MainTransactionId__std": "sample2"
  },
  {
    "id": "sample4",
    "SellingModelType__std": "Evergreen",
    "ParentTransactionId__std": "sample",
    "TransactionId__std": "sample4",
    "ProductName__std": "EvergreenSemiAnnualProduct",
    "StartDate__std": "2025-01-01",
    "PeriodBoundary__std": "DayOfPeriod",
    "BillingDayOfMonth__std": 1,
    "BillingStartMonth__std": 3,
    "UnitPrice__std": 10,
    "Quantity__std": 1,
    "TotalPrice__std": 10,
    "TaxTreatmentId__std": "1ttLT000000EV7DYAW",
    "BillingTreatmentId__std": "1BTLT00000008yT4AQ",
    "AccountId__std": "001LT00000dPVrLYAG",
    "BillToContactId__std": "003LT0000038bALYAY",
    "BillingTermUnit__std": "Semi-Annual",
    "BillingActionType__std": "Add",
    "BillingPostalCode__std": "94105",
    "CurrencyIsoCode__std": "USD",
    "BillingCity__std": "HYD",
    "ShippingCity__std": "VSKP",
    "AssociatedTransactionPricing__std": "IncludedInBundlePrice",
    "MainTransactionRole__std": "Bundle",
    "AssociatedTransactionRole__std": "BundleComponent",
    "MainTransactionId__std": "sample2"
  }

```


Name	Description	Mapped Field	Required or Optional
BillingProfileId__std	The ID of the billing profile (Billing Account record) that's related to the transaction. See Billing Profile requirements.	BillingAccountId field on the BillingSchedule object	Optional
BillingState__std	The state in the billing address of the transaction.	BillingState field on the BillingScheduleGroup object	Any one of the billing address fields is required.
BillingCity__std	The city in the billing address of the transaction.	BillingCity field on the BillingScheduleGroup object	Any one of the billing address fields is required.
BillingStreet__std	The street in the billing address of the transaction.	BillingStreet field on the BillingScheduleGroup object	Any one of the billing address fields is required.
BillingPostalCode__std	The postal code in the billing address of the transaction.	BillingPostalCode field on the BillingScheduleGroup object	Any one of the billing address fields is required.
BillingCountry__std	The country in the billing address of the transaction.	BillingCountry field on the BillingScheduleGroup object	Any one of the billing address fields is required.
ShippingCity__std	The city in the shipping address of the transaction.	ShippingCity field on the BillingScheduleGroup object	Any one of the shipping address fields is required.
ShippingStreet__std	The street in the shipping address of the transaction.	ShippingStreet field on the BillingScheduleGroup object	Any one of the shipping address fields is required.
ShippingCountry__std	The country in the shipping address of the transaction.	ShippingCountry field on the BillingScheduleGroup object	Any one of the shipping address fields is required.
ShippingState__std	The state in the shipping address of the transaction.	ShippingState field on the BillingScheduleGroup object	Any one of the shipping address fields is required.
ShippingPostalCode__std	The postal code in the shipping address of the transaction.	ShippingPostalCode field on the BillingScheduleGroup object	Any one of the shipping address fields is required.
SavedPaymentMethodId__std	The ID of the Saved Payment Method record that's used to pay for the invoice that's generated for the transaction.	SavedPaymentMethodId field on the BillingScheduleGroup object	Optional

Name	Description	Mapped Field	Required or Optional
PaymentTermId__std	The ID of the Payment Term record that's related to the transaction.	PaymentTermId field on the BillingScheduleGroup object	Optional
SellingModelType__std	The selling model type indicates whether the transaction is for a one-time product, a term-defined product, or an evergreen product. Specify <code>OneTime</code> as the SellingModelType for the transaction that's related to a product that's sold once.	BillingMethod on the BillingSchedule object is populated as OrderAmount.	Required
TransactionId__std	The ID of the transaction that you want to create a billing schedule for.	If the transaction is an OrderItem, OrderItemAdjustmentLineItem, OrderItemDetail, QuoteLineDetail, or QuoteLineItem record, the ReferenceEntityItemId field on the BillingSchedule object is populated. For other sObject records or external records, the ReferenceItem field on the BillingSchedule object is populated.	Required
ProductName__std	The name of the product that's related to the transaction that you want to create a billing schedule for.	ProductName field on the BillingScheduleGroup object	Either the ProductName or the ProductId is required
ProductId__std	The ID of the product that's related to the transaction that you want to create a billing schedule for.	Product2Id field on the BillingScheduleGroup object	Either the ProductName or the ProductId is required
LegalEntityId__std	The legal entity of your company that the transaction comes under. If you don't specify a LegalEntityId, the org-default LegalEntityId is considered.	LegalEntityId field on the BillingScheduleGroup object	Required
PeriodBoundary__std	The period boundary determines the start and end date of the billing period. Valid values are: <ul style="list-style-type: none"> • AlignToCalendar • Anniversary • DayOfPeriod • LastDayOfPeriod 	PeriodBoundary field on the BillingScheduleGroup object	Required for products with the TermDefined or Evergreen selling model types.
BillingDayOfMonth__std	The day of the month on which a recurring billing process is scheduled to occur for the transaction.	BillDayOfMonth field on the BillingScheduleGroup object	Required for products with the TermDefined or

Name	Description	Mapped Field	Required or Optional
			Evergreen selling model types.
BillingStartMonth__std	The month when billing begins for an annual subscription. This value can be any number from 1 through 12. For example, if billing starts in January, the value is 1. If billing starts in June, the value is 6.	BillingStartMonth field on the BillingScheduleGroup object	Required for products with the Evergreen selling model type.
UnitOfMeasureId__std	The ID of the Unit of Measure record that's used to define the unit for the quantity of the transaction.	UnitOfMeasureId field on the BillingSchedule object	Optional
EndDate__std	The end date of the transaction.	BillingScheduleEndDate field on the BillingSchedule object	Required for products with the TermDefined selling model type.
StartDate__std	The start date of the transaction.	BillingScheduleStartDate field on the BillingSchedule object	Required
Quantity__std	The quantity of the transaction.	Quantity field on the BillingSchedule object	Required
TaxTreatmentId__std	The ID of the tax treatment that's used to calculate tax for the transaction. If you don't specify a TaxTreatmentId, the org-default TaxTreatmentId is considered.	TaxTreatmentId field on the BillingScheduleGroup object	Required
BillingTermUnit__std	The unit of measurement of the billing term. Valid values are: <ul style="list-style-type: none"> • Month • Quarter • Semi-Annual • Year 	BillingTermUnit field on the BillingSchedule object	Required for products with the TermDefined or Evergreen selling model types.
BillingTreatmentId__std	The ID of the billing treatment that's used to create the billing schedule for the transaction. If you don't specify a BillingTreatmentId, the org-default BillingTreatmentId is considered.	BillingTreatmentId field on the BillingScheduleGroup object	Required
CurrencyIsoCode__std	The currency code of the transaction amount if your Salesforce org has multi-currency enabled.	CurrencyIsoCode field on the BillingScheduleGroup object	Required for Salesforce orgs with multiple currencies enabled .
RelatedTransactionId__std	The ID of the transaction that's related to the original transaction. This value isn't required for new sale transactions.	This value isn't populated on any BillingSchedule or BillingScheduleGroup field.	Optional

Name	Description	Mapped Field	Required or Optional
RampIdentifier__std	When the transaction is part of a ramp deal, the RampIdentifier value is a unique identifier for that ramp. All the transactions with the same RampIdentifier value are grouped to have billing schedules for the same billing schedule group.	This value isn't populated on any BillingSchedule or BillingScheduleGroup field.	Required
ProrationPolicy__std	The ID of the Proration Policy record that's related to the Product Selling Model Option record of the transaction.	ProrationPolicyId field on the BillingScheduleGroup object	Optional
BillingActionType__std	The action that you want to perform for the transaction. Valid value is Add.	Category field on the BillingSchedule object is populated as Original.	Required
UnitPrice__std	The unit price of the transaction.	UnitPrice field on the BillingSchedule object	Required
TotalPrice__std	The total price of the transaction.	TotalAmount field on the BillingSchedule object	Required
ProductUsageModelType__std	The type of usage model for the transaction product or service. Valid values are: <ul style="list-style-type: none"> Anchor—Anchor is the main subscription product or service. Pack—Pack is the add-on product or service that grants additional usage resources for consumption. 	BillingMethod value field on the BillingSchedule object is populated as OrderAmount.	Optional
NetUnitPrice__std	The net unit price of the transaction.	NetUnitPrice field on the BillingSchedule object	Optional
BindingInstance__std	The ID of the Asset record or custom object record that's related to the transaction.	BindingInstanceId on the BillingScheduleGroup object	Optional
InvoiceRunMatchingValue__std	The batch value that's used to group the billing schedule that's created for the transaction with other billing schedules with the same value. This way, the same invoice run can process these schedules. During an invoice run, billing schedules with the same batch value, including null, are grouped to be processed by the same invoice run.	InvoiceRunMatchingValue field on the BillingSchedule object	Optional
ReferenceRecordId__std	The ID of the Asset record that's related to the transaction.	ReferenceRecordId field on the BillingScheduleGroup object	Optional
CustomInvoiceGroupKey__std	When you want to generate a consolidated invoice for multiple transactions, specify the same	CustomInvoiceGroupKey field on the	Optional

Name	Description	Mapped Field	Required or Optional
	CustomInvoiceGroupKey for all these transactions. This key is used to group these transactions together and generate a consolidated invoice for all of them.	BillingScheduleGroup object	
MainTransactionId__std	When your transaction is part of a bundle, this value is the ID of the main transaction record for all the child transactions.	MainBsgId field on the BsgRelationship object	Optional
AssociatedTransactionId__std	When your transaction is part of a bundle, this value is the ID of the child transaction record.	AssociatedBsgId field on the BsgRelationship object	Optional
MainTransactionRole__std	When your transaction is part of a bundle, this value is the role of the primary transaction in the bundle relationship. Valid values are: <ul style="list-style-type: none"> AddOn Bundle Set 	MainBsgRole field on the BsgRelationship object	Optional
AssociatedTransactionRole__std	When your transaction is part of a bundle, this value is the role of the child transaction in the bundle relationship. Valid values are: <ul style="list-style-type: none"> BundleComponent ClassificationComponent 	AssociatedBsgRole field on the BsgRelationship object	Optional
AssociatedTransactionPricing__std	When your transaction is part of a bundle, this value describes how the child transaction is priced in relation to the primary transaction. Valid values are: <ul style="list-style-type: none"> IncludedInBundlePrice NotIncludedInBundlePrice 	AssociatedBsgPricing field on the BsgRelationship object	Optional
ProductRelationshipTypeId__std	The ID of the Product Relationship Type record that defines the relationship between the primary and child transactions.	ProductRelationshipTypeId field on the BsgRelationship object	Optional

Considerations

Keep these important considerations in mind when you provide the details for new sale transactions with ramped products.

- The `BillingActionType__std` value for any new sale transaction must be `Add`.
- For new sale transactions with a ramped product, the `RampIdentifier__std` value is required.
- If you don't provide the `TaxTreatmentId__std` value, the `BillingTreatmentId__std` value, or the `LegalEntityId__std` value for the transaction, the default `TaxTreatmentId`, `BillingTreatmentId`, and `LegalEntityId` of your Salesforce org is considered. If your org doesn't have any default values, an error occurs.
- The billing schedules for transactions with the same `RampIdentifier__std` value are created for the same billing schedule group.

- To understand the requirements for the various selling model types, see these resources.
 - [One-Time New Sale Transaction](#) on page 1913
 - [Term-Defined New Sale Transaction](#) on page 1920
 - [Evergreen New Sale Transaction](#) on page 1927

JSON example

This example includes the transaction data for a new sale transaction with ramped products and a `TermDefined` selling model.

```
{
  "Transaction": [
    {
      "id": "ter1",
      "SellingModelType__std": "TermDefined",
      "ParentTransactionId__std": "sample",
      "TransactionId__std": "ter1",
      "ProductName__std": "TermedQuarterlyProduct",
      "StartDate__std": "2025-01-01",
      "EndDate__std": "2025-12-31",
      "PeriodBoundary__std": "DayOfPeriod",
      "BillingDayOfMonth__std": 1,
      "UnitPrice__std": 10,
      "Quantity__std": 5,
      "TotalPrice__std": 120,
      "TaxTreatmentId__std": "1ttLT000000EV7DYAW",
      "BillingTreatmentId__std": "1BTLT00000008yT4AQ",
      "AccountId__std": "001LT00000dPVrlyAG",
      "BillingProfileId__std": "001LT00000dPVrlyAG",
      "BillingCity__std": "HYD",
      "ShippingCity__std": "VSKP",
      "BillingTermUnit__std": "Month",
      "BillingActionType__std": "Add",
      "CurrencyIsoCode__std": "USD",
      "RampIdentifier__std": "ramp1",
      "Transaction_Make__c": "3001",
      "Transaction_Color__c": "Blue"
    },
    {
      "id": "ter2",
      "SellingModelType__std": "TermDefined",
      "ParentTransactionId__std": "sample",
      "TransactionId__std": "ter2",
      "ProductName__std": "TermedQuarterlyProduct",
      "StartDate__std": "2025-01-01",
      "EndDate__std": "2025-12-31",
      "PeriodBoundary__std": "DayOfPeriod",
      "BillingDayOfMonth__std": 1,
      "UnitPrice__std": 10,
      "Quantity__std": 5,
      "TotalPrice__std": 120,
      "TaxTreatmentId__std": "1ttLT000000EV7DYAW",
      "BillingTreatmentId__std": "1BTLT00000008yT4AQ",
      "AccountId__std": "001LT00000dPVrlyAG",
      "BillingProfileId__std": "001LT00000dPVrlyAG",

```


Context Tag in the Transaction Node of the StandaloneBillingContext Context Definition	Description	Mapped Field	Required or Optional
		Reference field on the BillingSchedule object is populated.	
AccountId__std	The ID of the Account record that's related to the transaction.	BillingAccountId field on the BillingScheduleGroup object	Required
BillingProfileId__std	The ID of the billing profile (Billing Account record) that's related to the transaction. See Billing Profile requirements.	BillingAccountId field on the BillingSchedule object	Optional
BillingState__std	The state in the billing address of the transaction.	BillingState field on the BillingScheduleGroup object	Any one of the billing address fields is required.
BillingCity__std	The city in the billing address of the transaction.	BillingCity field on the BillingScheduleGroup object	Any one of the billing address fields is required.
BillingStreet__std	The street in the billing address of the transaction.	BillingStreet field on the BillingScheduleGroup object	Any one of the billing address fields is required.
BillingPostalCode__std	The postal code in the billing address of the transaction.	BillingPostalCode field on the BillingScheduleGroup object	Any one of the billing address fields is required.
BillingCountry__std	The country in the billing address of the transaction.	BillingCountry field on the BillingScheduleGroup object	Any one of the billing address fields is required.
ShippingCity__std	The city in the shipping address of the transaction.	ShippingCity field on the BillingScheduleGroup object	Any one of the shipping address fields is required.
ShippingStreet__std	The street in the shipping address of the transaction.	ShippingStreet field on the BillingScheduleGroup object	Any one of the shipping address fields is required.
ShippingCountry__std	The country in the shipping address of the transaction.	ShippingCountry field on the BillingScheduleGroup object	Any one of the shipping address fields is required.
ShippingState__std	The state in the shipping address of the transaction.	ShippingState field on the BillingScheduleGroup object	Any one of the shipping address fields is required.

Context Tag in the Transaction Node of the StandaloneBillingContext Context Definition	Description	Mapped Field	Required or Optional
ShippingPostalCode__std	The postal code in the shipping address of the transaction.	ShippingPostalCode field on the BillingScheduleGroup object	Any one of the shipping address fields is required.
SavedPaymentMethodId__std	The ID of the Saved Payment Method record that's used to pay for the invoice that's generated for the transaction.	SavedPaymentMethodId field on the BillingScheduleGroup object	Optional
PaymentTermId__std	The ID of the Payment Term record that's related to the transaction.	PaymentTermId field on the BillingScheduleGroup object	Optional
SellingModelType__std	The selling model type indicates whether the transaction is for a one-time product, a term-defined product, or an evergreen product. Specify <code>OneTime</code> as the <code>SellingModelType</code> for the transaction that's related to a product that's sold once.	BillingMethod on the BillingSchedule object is populated as <code>OrderAmount</code> .	Required
TransactionId__std	The ID of the transaction that you want to create a billing schedule for.	If the transaction is an <code>OrderItem</code> , <code>OrderItemAdjustmentLineItem</code> , <code>OrderItemDetail</code> , <code>QuoteLineDetail</code> , or <code>QuoteLineItem</code> record, the <code>ReferenceEntityItemId</code> field on the <code>BillingSchedule</code> object is populated. For other <code>sObject</code> records or external records, the <code>ReferenceItem</code> field on the <code>BillingSchedule</code> object is populated.	Required
ProductName__std	The name of the product that's related to the transaction that you want to create a billing schedule for.	ProductName field on the BillingScheduleGroup object	Either the ProductName or the ProductId is required
ProductId__std	The ID of the product that's related to the transaction that you want to create a billing schedule for.	Product2Id field on the BillingScheduleGroup object	Either the ProductName or the ProductId is required

Context Tag in the Transaction Node of the StandaloneBillingContext Context Definition	Description	Mapped Field	Required or Optional
LegalEntityId__std	The legal entity of your company that the transaction comes under. If you don't specify a LegalEntityId, the org-default LegalEntityId is considered.	LegalEntityId field on the BillingScheduleGroup object	Required
PeriodBoundary__std	The period boundary determines the start and end date of the billing period. Valid values are: <ul style="list-style-type: none"> AlignToCalendar Anniversary DayOfPeriod LastDayOfPeriod 	PeriodBoundary field on the BillingScheduleGroup object	Required for products with the TermDefined or Evergreen selling model types.
BillingDayOfMonth__std	The day of the month on which a recurring billing process is scheduled to occur for the transaction.	BillDayOfMonth field on the BillingScheduleGroup object	Required for products with the TermDefined or Evergreen selling model types.
BillingStartMonth__std	The month when billing begins for an annual subscription. This value can be any number from 1 through 12. For example, if billing starts in January, the value is 1. If billing starts in June, the value is 6.	BillingStartMonth field on the BillingScheduleGroup object	Required for products with the Evergreen selling model type.
UnitOfMeasureId__std	The ID of the Unit of Measure record that's used to define the unit for the quantity of the transaction.	UnitOfMeasureId field on the BillingSchedule object	Optional
EndDate__std	The end date of the transaction.	BillingScheduleEndDate field on the BillingSchedule object	Required for products with the TermDefined selling model type.
StartDate__std	The start date of the transaction.	BillingScheduleStartDate field on the BillingSchedule object	Required
Quantity__std	The quantity of the transaction.	Quantity field on the BillingSchedule object	Required
TaxTreatmentId__std	The ID of the tax treatment that's used to calculate tax for the transaction. If you don't specify a TaxTreatmentId, the org-default TaxTreatmentId is considered.	TaxTreatmentId field on the BillingScheduleGroup object	Required

Context Tag in the Transaction Node of the StandaloneBillingContext Context Definition	Description	Mapped Field	Required or Optional
BillingTermUnit__std	The unit of measurement of the billing term. Valid values are: <ul style="list-style-type: none"> • Month • Quarter • Semi-Annual • Year 	BillingTermUnit field on the BillingSchedule object	Required for products with the TermDefined or Evergreen selling model types.
BillingTreatmentId__std	The ID of the billing treatment that's used to create the billing schedule for the transaction. If you don't specify a BillingTreatmentId, the org-default BillingTreatmentId is considered.	BillingTreatmentId field on the BillingScheduleGroup object	Required
CurrencyIsoCode__std	The currency code of the transaction amount if your Salesforce org has multi-currency enabled.	CurrencyIsoCode field on the BillingScheduleGroup object	Required for Salesforce orgs with multiple currencies enabled .
RelatedTransactionId__std	The ID of the transaction that's related to the original transaction. This value isn't required for new sale transactions.	This value isn't populated on any BillingSchedule or BillingScheduleGroup field.	Optional
RampIdentifier__std	When the transaction is part of a ramp deal, the RampIdentifier value is a unique identifier for that ramp. All the transactions with the same RampIdentifier value are grouped to have billing schedules for the same billing schedule group.	This value isn't populated on any BillingSchedule or BillingScheduleGroup field.	Optional
ProrationPolicy__std	The ID of the Proration Policy record that's related to the Product Selling Model Option record of the transaction.	ProrationPolicyId field on the BillingScheduleGroup object	Optional
BillingActionType__std	The action that you want to perform for the transaction. Valid value is Add.	Category field on the BillingSchedule object is populated as Original.	Required
UnitPrice__std	The unit price of the transaction.	UnitPrice field on the BillingSchedule object	Required
TotalPrice__std	The total price of the transaction.	TotalAmount field on the BillingSchedule object	Required
ProductUsageModelType__std	The type of usage model for the transaction product or service. Valid values are: <ul style="list-style-type: none"> • Anchor—Anchor is the main subscription product or service. 	BillingMethod value field on the BillingSchedule object is populated as OrderAmount.	Required

Context Tag in the Transaction Node of the StandaloneBillingContext Context Definition	Description	Mapped Field	Required or Optional
	<ul style="list-style-type: none"> Pack—Pack is the add-on product or service that grants additional usage resources for consumption. 		
NetUnitPrice__std	The net unit price of the transaction.	NetUnitPrice field on the BillingSchedule object	Optional
BindingInstance__std	The ID of the Asset record or custom object record that's related to the transaction.	BindingInstanceId on the BillingScheduleGroup object	Required
InvoiceRunMatchingValue__std	The batch value that's used to group the billing schedule that's created for the transaction with other billing schedules with the same value. This way, the same invoice run can process these schedules. During an invoice run, billing schedules with the same batch value, including null, are grouped to be processed by the same invoice run.	InvoiceRunMatchingValue field on the BillingSchedule object	Optional
ReferenceRecordId__std	The ID of the Asset record that's related to the transaction.	ReferenceRecordId field on the BillingScheduleGroup object	Optional
CustomInvoiceGroupKey__std	When you want to generate a consolidated invoice for multiple transactions, specify the same CustomInvoiceGroupKey for all these transactions. This key is used to group these transactions together and generate a consolidated invoice for all of them.	CustomInvoiceGroupKey field on the BillingScheduleGroup object	Optional
MainTransactionId__std	When your transaction is part of a bundle, this value is the ID of the main transaction record for all the child transactions.	MainBsgId field on the BsgRelationship object	Optional
AssociatedTransactionId__std	When your transaction is part of a bundle, this value is the ID of the child transaction record.	AssociatedBsgId field on the BsgRelationship object	Optional
MainTransactionRole__std	When your transaction is part of a bundle, this value is the role of the primary transaction in the bundle relationship. Valid values are: <ul style="list-style-type: none"> AddOn Bundle Set 	MainBsgRole field on the BsgRelationship object	Optional

Context Tag in the Transaction Node of the StandaloneBillingContext Context Definition	Description	Mapped Field	Required or Optional
<code>AssociatedTransactionRole__std</code>	When your transaction is part of a bundle, this value is the role of the child transaction in the bundle relationship. Valid values are: <ul style="list-style-type: none"> • <code>BundleComponent</code> • <code>ClassificationComponent</code> 	<code>AssociatedBsgRole</code> field on the <code>BsgRelationship</code> object	Optional
<code>AssociatedTransactionPricing__std</code>	When your transaction is part of a bundle, this value describes how the child transaction is priced in relation to the primary transaction. Valid values are: <ul style="list-style-type: none"> • <code>IncludedInBundlePrice</code> • <code>NotIncludedInBundlePrice</code> 	<code>AssociatedBsgPricing</code> field on the <code>BsgRelationship</code> object	Optional
<code>ProductRelationshipTypeId__std</code>	The ID of the Product Relationship Type record that defines the relationship between the primary and child transactions.	<code>ProductRelationshipTypeId</code> field on the <code>BsgRelationship</code> object	Optional

Considerations

Keep these important considerations in mind when you provide the details for new sale transactions with a usage-based product.

- The `BillingActionType__std` value for any new sale transaction must be `Add`.
- For new sale transactions with a usage-based product, the `ProductUsageModelType__std` and `BindingInstance__std` values are required.
- If you don't provide the `TaxTreatmentId__std` value, the `BillingTreatmentId__std` value, or the `LegalEntityId__std` value for the transaction, the default `TaxTreatmentId`, `BillingTreatmentId`, and `LegalEntityId` of your Salesforce org is considered. If your org doesn't have any default values, an error occurs.
- To understand the requirements for the various selling model types, see these resources.
 - [One-Time New Sale Transaction](#) on page 1913
 - [Term-Defined New Sale Transaction](#) on page 1920
 - [Evergreen New Sale Transaction](#) on page 1927

JSON example

This sample is for a new sale transaction for a usage-based product with a `TermDefined` selling model.

```
{
  "Transaction": [
    {
      "id": "onetimeUsage2",
      "SellingModelType__std": "TermDefined",
      "ParentTransactionId__std": "sample",
      "TransactionId__std": "onetimeUsage2",
      "StartDate__std": "2025-01-01",

```



```

    "EndDate__std": "2025-12-31",
    "PeriodBoundary__std": "DayOfPeriod",
    "BillingDayOfMonth__std": 1,
    "BillingTermUnit__std": "Month",
    "UnitPrice__std": 10,
    "Quantity__std": 1,
    "TotalPrice__std": 120,
    "AccountId__std": "001xx000003GgEJAA0",
    "BillingProfileId__std": "001LT00000dPVrlyAG",
    "BillingActionType__std": "Add",
    "CurrencyIsoCode__std": "USD",
    "BillingCity__std": "Hyderabad",
    "ShippingCity__std": "SFO",
    "ProductUsageModelType__std": "Anchor",
    "BindingInstance__std": "001xx000003GgChAAK",
    "ProductId__std": "01txx0000006i3DAAQ",
    "Transaction_Make__c": "3001",
    "Transaction_Color__c": "Blue"
  }
]
}

```

This example shows the request payload to create a billing schedule for a new sale transaction for usage-based products with a TermDefined selling model.

```

{
  "transactionDetails":
  "transactionDetails": {
  "transactionContextDetails": {
    "contextDefinitionName": "StandaloneBillingContext__stdctx",
    "intraContextCustomMappingName": "CustomContextMapping",
    "readContextMappingName": "TransactionMapping",
    "saveContextMappingName": "BSGEntitiesMapping"
  }
}

```

Amended Transaction

Understand the required values and key considerations before you create a billing schedule for an amended transaction.

When you're creating a billing schedule for an amended transaction, make sure that you specify the mandatory values in the transactionDetails property value.

Context Tag in the Transaction Node of the StandaloneBillingContext Context Definition	Description	Mapped Field	Required or Optional
BillToContactId__std	The ID of the Contact record that's related to the transaction.	BillToContactId field on the BillingScheduleGroup object	Optional

Context Tag in the Transaction Node of the StandaloneBillingContext Context Definition	Description	Mapped Field	Required or Optional
ParentTransactionId__std	The ID of the parent transaction record. For example, if the transaction is at a level similar to that of an Order Item record, the parent transaction will be at a level similar to that of an Order record.	If the transaction is a child Order or Quote record, the ReferenceEntityId field on the BillingScheduleobject is populated. For other sObject records or external records, the Reference field on the BillingSchedule object is populated.	Optional
AccountId__std	The ID of the Account record that's related to the transaction.	BillingAccountId field on the BillingScheduleGroup object	Optional
BillingProfileId__std	The ID of the billing profile (Billing Account record) that's related to the transaction. See Billing Profile requirements.	BillingAccountId field on the BillingSchedule object	Optional
BillingState__std	The state in the billing address of the transaction.	BillingState field on the BillingScheduleGroup object	Optional
BillingCity__std	The city in the billing address of the transaction.	BillingCity field on the BillingScheduleGroup object	Optional
BillingStreet__std	The street in the billing address of the transaction.	BillingStreet field on the BillingScheduleGroup object	Optional
BillingPostalCode__std	The postal code in the billing address of the transaction.	BillingPostalCode field on the BillingScheduleGroup object	Optional
BillingCountry__std	The country in the billing address of the transaction.	BillingCountry field on the BillingScheduleGroup object	Optional
ShippingCity__std	The city in the shipping address of the transaction.	ShippingCity field on the BillingScheduleGroup object	Optional
ShippingStreet__std	The street in the shipping address of the transaction.	ShippingStreet field on the BillingScheduleGroup object	Optional

Context Tag in the Transaction Node of the StandaloneBillingContext Context Definition	Description	Mapped Field	Required or Optional
ShippingCountry__std	The country in the shipping address of the transaction.	ShippingCountry field on the BillingScheduleGroup object	Optional
ShippingState__std	The state in the shipping address of the transaction.	ShippingState field on the BillingScheduleGroup object	Optional
ShippingPostalCode__std	The postal code in the shipping address of the transaction.	ShippingPostalCode field on the BillingScheduleGroup object	Optional
SavedPaymentMethodId__std	The ID of the Saved Payment Method record that's used to pay for the invoice that's generated for the transaction.	SavedPaymentMethodId field on the BillingScheduleGroup object	Optional
PaymentTermId__std	The ID of the Payment Term record that's related to the transaction.	PaymentTermId field on the BillingScheduleGroup object	Optional
SellingModelType__std	The selling model type indicates whether the original transaction is for a one-time product, a term-defined product, or an evergreen product.	BillingMethod on the BillingSchedule object	Optional
TransactionId__std	The ID of the transaction that you want to create a billing schedule for.	If the transaction is an OrderItem, OrderItemAdjustmentLineItem, OrderItemDetail, QuoteLineDetail, or QuoteLineItem record, the ReferenceEntityItemId field on the BillingSchedule object is populated. For other sObject records or external records, the ReferenceItem field on the BillingSchedule object is populated.	Required
ProductName__std	The name of the product that's related to the transaction that you want to create a billing schedule for.	ProductName field on the BillingScheduleGroup object	Optional

Context Tag in the Transaction Node of the StandaloneBillingContext Context Definition	Description	Mapped Field	Required or Optional
ProductId__std	The ID of the product that's related to the transaction that you want to create a billing schedule for.	Product2Id field on the BillingScheduleGroup object	Optional
LegalEntityId__std	The legal entity of your company that the transaction comes under. The LegalEntityId of the RelatedTransactionId is considered.	LegalEntityId field on the BillingScheduleGroup object	Optional
PeriodBoundary__std	The period boundary determines the start and end date of the billing period. Valid values are: <ul style="list-style-type: none"> AlignToCalendar Anniversary DayOfPeriod LastDayOfPeriod 	PeriodBoundary field on the BillingScheduleGroup object	Optional
BillingDayOfMonth__std	The day of the month on which a recurring billing process is scheduled to occur for the transaction.	BillDayOfMonth field on the BillingScheduleGroup object	Optional
BillingStartMonth__std	The month when billing begins for an annual subscription. This value can be any number from 1 through 12. For example, if billing starts in January, the value is 1. If billing starts in June, the value is 6.	BillingStartMonth field on the BillingScheduleGroup object	Optional
UnitOfMeasureId__std	The ID of the Unit of Measure record that's used to define the unit for the quantity of the transaction.	UnitOfMeasureId field on the BillingSchedule object	Optional
EndDate__std	The end date of the transaction.	BillingScheduleEndDate field on the BillingSchedule object	Optional
StartDate__std	The start date of the transaction.	BillingScheduleStartDate field on the BillingSchedule object	Required
Quantity__std	The quantity of the transaction.	Quantity field on the BillingSchedule object	Required
TaxTreatmentId__std	The ID of the tax treatment that's used to calculate tax for the transaction. If you don't specify a TaxTreatmentId, the org-default TaxTreatmentId is considered.	TaxTreatmentId field on the BillingScheduleGroup object	Optional

Context Tag in the Transaction Node of the StandaloneBillingContext Context Definition	Description	Mapped Field	Required or Optional
BillingTermUnit__std	The unit of measurement of the billing term. Valid values are: <ul style="list-style-type: none"> • Month • Quarter • Semi-Annual • Year 	BillingTermUnit field on the BillingSchedule object	Optional
BillingTreatmentId__std	The ID of the billing treatment that's used to create the billing schedule for the transaction. The BillingTreatmentId of the RelatedTransactionId is considered.	BillingTreatmentId field on the BillingScheduleGroup object	Optional
CurrencyIsoCode__std	The currency code of the transaction amount if your Salesforce org has multi-currency enabled.	CurrencyIsoCode field on the BillingScheduleGroup object	Required for Salesforce orgs with multiple currencies enabled .
RelatedTransactionId__std	The ID of the transaction that's related to the original transaction.	This value isn't populated on any BillingSchedule or BillingScheduleGroup field.	Required
RampIdentifier__std	When the transaction is part of a ramp deal, the RampIdentifier value is a unique identifier for that ramp. All the transactions with the same RampIdentifier value are grouped to have billing schedules for the same billing schedule group.	This value isn't populated on any BillingSchedule or BillingScheduleGroup field.	Optional
ProrationPolicy__std	The ID of the Proration Policy record that's related to the Product Selling Model Option record of the transaction.	ProrationPolicyId field on the BillingScheduleGroup object	Optional
BillingActionType__std	The action that you want to perform for the transaction. Valid values are: <ul style="list-style-type: none"> • Add • Amend • Renew • Cancel Specify Amend as the BillingActionType for amended transactions.	Category field on the BillingSchedule object is populated as AmendQuantity.	Required
UnitPrice__std	The unit price of the transaction.	UnitPrice field on the BillingSchedule object	Required

Context Tag in the Transaction Node of the StandaloneBillingContext Context Definition	Description	Mapped Field	Required or Optional
TotalPrice__std	The total price of the transaction.	TotalAmount field on the BillingSchedule object	Required
ProductUsageModelType__std	The type of usage model for the transaction product or service. Valid values are: <ul style="list-style-type: none"> Anchor—Anchor is the main subscription product or service. Pack—Pack is the add-on product or service that grants additional usage resources for consumption. 	BillingMethod value field on the BillingSchedule object is populated as OrderAmount.	Optional
NetUnitPrice__std	The net unit price of the transaction.	NetUnitPrice field on the BillingSchedule object	Optional
BindingInstance__std	The ID of the Asset record or custom object record that's related to the transaction.	BindingInstanceId on the BillingScheduleGroup object	Optional
InvoiceRunMatchingValue__std	The batch value that's used to group the billing schedule that's created for the transaction with other billing schedules with the same value. This way, the same invoice run can process both schedules. During an invoice run, billing schedules with the same batch value, including null, are grouped to be processed by the same invoice run.	InvoiceRunMatchingValue field on the BillingSchedule object	Optional
ReferenceRecordId__std	The ID of the Asset record that's related to the transaction.	ReferenceRecordId field on the BillingScheduleGroup object	Optional
CustomInvoiceGroupKey__std	When you want to generate a consolidated invoice for multiple transactions, specify the same CustomInvoiceGroupKey for all these transactions. This key is used to group these transactions together and generate a consolidated invoice for all of them.	CustomInvoiceGroupKey field on the BillingScheduleGroup object	Optional
MainTransactionId__std	When your transaction is part of a bundle, this value is the ID of the child transaction record.	MainBsgId field on the BsgRelationship object	Optional
AssociatedTransactionId__std	When your transaction is part of a bundle, this value is the ID of the child transaction record.	AssociatedBsgId field on the BsgRelationship object	Optional

Context Tag in the Transaction Node of the StandaloneBillingContext Context Definition	Description	Mapped Field	Required or Optional
<code>MainTransactionRole__std</code>	When your transaction is part of a bundle, this value is the role of the primary transaction in the bundle relationship. Valid values are: <ul style="list-style-type: none"> • AddOn • Bundle • Set 	MainBsgRole field on the BsgRelationship object	Optional
<code>AssociatedTransactionRole__std</code>	When your transaction is part of a bundle, this value is the role of the child transaction in the bundle relationship. Valid values are: <ul style="list-style-type: none"> • BundleComponent • ClassificationComponent 	AssociatedBsgRole field on the BsgRelationship object	Optional
<code>AssociatedTransactionPricing__std</code>	When your transaction is part of a bundle, this value describes how the child transaction is priced in relation to the primary transaction. Valid values are: <ul style="list-style-type: none"> • IncludedInBundlePrice • NotIncludedInBundlePrice 	AssociatedBsgPricing field on the BsgRelationship object	Optional
<code>ProductRelationshipTypeId__std</code>	The ID of the Product Relationship Type record that defines the relationship between the primary and child transactions.	ProductRelationshipTypeId field on the BsgRelationship object	Optional

Considerations

Keep these important considerations in mind when providing the details for amended transactions.

- The `BillingActionType__std` value for any amended transaction must be `Amend`.
- When you provide a negative quantity, make sure that it's less than the total quantity of the related transaction.
- If your transaction is for an sObject record, only specify the record ID as the `id` value in the `transactionDetails` property value. All the other transaction details are automatically fetched from the sObject record if those details are mapped in the context definition.

JSON example

This sample includes the transaction data for an amendment.

```
{
  "Transaction": [
    {
      "id": "sampleA1",
      "ParentTransactionId__std": "sample",
      "TransactionId__std": "sampleA1",

```


When you're creating a billing schedule for a renewal transaction, make sure that you provide the mandatory values in the `transactionDetails` property value.

Context Tag in the Transaction Node of the StandaloneBillingContext Context Definition	Description	Mapped Field	Required or Optional
<code>BillToContactId__std</code>	The ID of the Contact record that's related to the transaction.	<code>BillToContactId</code> field on the <code>BillingScheduleGroup</code> object	Optional
<code>ParentTransactionId__std</code>	The ID of the parent transaction record. For example, if the transaction is at a level similar to that of an Order Item record, the parent transaction will be at a level similar to that of an Order record.	If the transaction is a child Order or Quote record, the <code>ReferenceEntityId</code> field on the <code>BillingScheduleobject</code> is populated. For other <code>sObject</code> records or external records, the <code>Reference</code> field on the <code>BillingSchedule</code> object is populated.	Optional
<code>AccountId__std</code>	The ID of the Account record that's related to the transaction.	<code>BillingAccountId</code> field on the <code>BillingScheduleGroup</code> object	Optional
<code>BillingProfileId__std</code>	The ID of the billing profile (Billing Account record) that's related to the transaction. See Billing Profile requirements.	<code>BillingAccountId</code> field on the <code>BillingSchedule</code> object	Optional
<code>BillingState__std</code>	The state in the billing address of the transaction.	<code>BillingState</code> field on the <code>BillingScheduleGroup</code> object	Optional
<code>BillingCity__std</code>	The city in the billing address of the transaction.	<code>BillingCity</code> field on the <code>BillingScheduleGroup</code> object	Optional
<code>BillingStreet__std</code>	The street in the billing address of the transaction.	<code>BillingStreet</code> field on the <code>BillingScheduleGroup</code> object	Optional
<code>BillingPostalCode__std</code>	The postal code in the billing address of the transaction.	<code>BillingPostalCode</code> field on the <code>BillingScheduleGroup</code> object	Optional
<code>BillingCountry__std</code>	The country in the billing address of the transaction.	<code>BillingCountry</code> field on the <code>BillingScheduleGroup</code> object	Optional

Context Tag in the Transaction Node of the StandaloneBillingContext Context Definition	Description	Mapped Field	Required or Optional
ShippingCity__std	The city in the shipping address of the transaction.	ShippingCity field on the BillingScheduleGroup object	Optional
ShippingStreet__std	The street in the shipping address of the transaction.	ShippingStreet field on the BillingScheduleGroup object	Optional
ShippingCountry__std	The country in the shipping address of the transaction.	ShippingCountry field on the BillingScheduleGroup object	Optional
ShippingState__std	The state in the shipping address of the transaction.	ShippingState field on the BillingScheduleGroup object	Optional
ShippingPostalCode__std	The postal code in the shipping address of the transaction.	ShippingPostalCode field on the BillingScheduleGroup object	Optional
SavedPaymentMethodId__std	The ID of the Saved Payment Method record that's used to pay for the invoice that's generated for the transaction.	SavedPaymentMethodId field on the BillingScheduleGroup object	Optional
PaymentTermId__std	The ID of the Payment Term record that's related to the transaction.	PaymentTermId field on the BillingScheduleGroup object	Optional
SellingModelType__std	The selling model type indicates whether the original transaction is for a one-time product, a term-defined product, or an evergreen product.	BillingMethod on the BillingSchedule object	Optional
TransactionId__std	The ID of the transaction that you want to create a billing schedule for.	If the transaction is an OrderItem, OrderItemAdjustmentLineItem, OrderItemDetail, QuoteLineDetail, or QuoteLineItem record, the ReferenceEntityItemId field on the BillingSchedule object is populated. For other sObject records or external records, the	Required

Context Tag in the Transaction Node of the StandaloneBillingContext Context Definition	Description	Mapped Field	Required or Optional
		Referenceltem field on the BillingSchedule object is populated.	
ProductName__std	The name of the product that's related to the transaction that you want to create a billing schedule for.	ProductName field on the BillingScheduleGroup object	Optional
ProductId__std	The ID of the product that's related to the transaction that you want to create a billing schedule for.	Product2Id field on the BillingScheduleGroup object	Optional
LegalEntityId__std	The legal entity of your company that the transaction comes under. The LegalEntityId of the RelatedTransactionId is considered.	LegalEntityId field on the BillingScheduleGroup object	Optional
PeriodBoundary__std	The period boundary determines the start and end date of the billing period. Valid values are: <ul style="list-style-type: none"> AlignToCalendar Anniversary DayOfPeriod LastDayOfPeriod 	PeriodBoundary field on the BillingScheduleGroup object	Optional
BillingDayOfMonth__std	The day of the month on which a recurring billing process is scheduled to occur for the transaction.	BillDayOfMonth field on the BillingScheduleGroup object	Optional
BillingStartMonth__std	The month when billing begins for an annual subscription. This value can be any number from 1 through 12. For example, if billing starts in January, the value is 1. If billing starts in June, the value is 6.	BillingStartMonth field on the BillingScheduleGroup object	Optional
UnitOfMeasureId__std	The ID of the Unit of Measure record that's used to define the unit for the quantity of the transaction.	UnitOfMeasureId field on the BillingSchedule object	Optional
EndDate__std	The end date of the transaction.	BillingScheduleEndDate field on the BillingSchedule object	Required
StartDate__std	The start date of the transaction.	BillingScheduleStartDate field on the BillingSchedule object	Required
Quantity__std	The quantity of the transaction.	Quantity field on the BillingSchedule object	Required

Context Tag in the Transaction Node of the StandaloneBillingContext Context Definition	Description	Mapped Field	Required or Optional
TaxTreatmentId__std	The ID of the tax treatment that's used to calculate tax for the transaction. If you don't specify a TaxTreatmentId, the org-default TaxTreatmentId is considered.	TaxTreatmentId field on the BillingScheduleGroup object	Optional
BillingTermUnit__std	The unit of measurement of the billing term. Valid values are: <ul style="list-style-type: none"> • Month • Quarter • Semi-Annual • Year 	BillingTermUnit field on the BillingSchedule object	Optional
BillingTreatmentId__std	The ID of the billing treatment that's used to create the billing schedule for the transaction. The BillingTreatmentId of the RelatedTransactionId is considered.	BillingTreatmentId field on the BillingScheduleGroup object	Optional
CurrencyIsoCode__std	The currency code of the transaction amount if your Salesforce org has multi-currency enabled.	CurrencyIsoCode field on the BillingScheduleGroup object	Required for Salesforce orgs with multiple currencies enabled .
RelatedTransactionId__std	The ID of the original transaction that's related to the renewal transaction.	This value isn't populated on any BillingSchedule or BillingScheduleGroup field.	Required
RampIdentifier__std	When the transaction is part of a ramp deal, the RampIdentifier value is a unique identifier for that ramp. All the transactions with the same RampIdentifier value are grouped to have billing schedules for the same billing schedule group.	This value isn't populated on any BillingSchedule or BillingScheduleGroup field.	Optional
ProrationPolicy__std	The ID of the Proration Policy record that's related to the Product Selling Model Option record of the transaction.	ProrationPolicyId field on the BillingScheduleGroup object	Optional
BillingActionType__std	The action that you want to perform for the transaction. Valid values are: <ul style="list-style-type: none"> • Add • Amend • Renew • Cancel 	Category field on the BillingSchedule object is populated as Renewal.	Required

Context Tag in the Transaction Node of the StandaloneBillingContext Context Definition	Description	Mapped Field	Required or Optional
	Specify <code>Renew</code> as the <code>BillingActionType</code> for renewal transactions.		
<code>UnitPrice__std</code>	The unit price of the transaction.	<code>UnitPrice</code> field on the <code>BillingSchedule</code> object	Required
<code>TotalPrice__std</code>	The total price of the transaction.	<code>TotalAmount</code> field on the <code>BillingSchedule</code> object	Required
<code>ProductUsageModelType__std</code>	The type of usage model for the transaction product or service. Valid values are: <ul style="list-style-type: none"> <code>Anchor</code>—Anchor is the main subscription product or service. <code>Pack</code>—Pack is the add-on product or service that grants additional usage resources for consumption. 	<code>BillingMethod</code> value field on the <code>BillingSchedule</code> object is populated as <code>OrderAmount</code> .	Optional
<code>NetUnitPrice__std</code>	The net unit price of the transaction.	<code>NetUnitPrice</code> field on the <code>BillingSchedule</code> object	Optional
<code>BindingInstance__std</code>	The ID of the Asset record or custom object record that's related to the transaction.	<code>BindingInstanceId</code> on the <code>BillingScheduleGroup</code> object	Optional
<code>InvoiceRunMatchingValue__std</code>	The batch value that's used to group the billing schedule that's created for the transaction with other billing schedules with the same value. This way, the same invoice run can process both schedules. During an invoice run, billing schedules with the same batch value, including null, are grouped to be processed by the same invoice run.	<code>InvoiceRunMatchingValue</code> field on the <code>BillingSchedule</code> object	Optional
<code>ReferenceRecordId__std</code>	The ID of the Asset record that's related to the transaction.	<code>ReferenceRecordId</code> field on the <code>BillingScheduleGroup</code> object	Optional
<code>CustomInvoiceGroupKey__std</code>	When you want to generate a consolidated invoice for multiple transactions, specify the same <code>CustomInvoiceGroupKey</code> for all these transactions. This key is used to group these transactions together and generate a consolidated invoice for all of them.	<code>CustomInvoiceGroupKey</code> field on the <code>BillingScheduleGroup</code> object	Optional
<code>MainTransactionId__std</code>	When your transaction is part of a bundle, this value is the ID of the child transaction record.	<code>MainBsgId</code> field on the <code>BsgRelationship</code> object	Optional

Context Tag in the Transaction Node of the StandaloneBillingContext Context Definition	Description	Mapped Field	Required or Optional
<code>AssociatedTransactionId__std</code>	When your transaction is part of a bundle, this value is the ID of the child transaction record.	AssociatedBsgId field on the BsgRelationship object	Optional
<code>MainTransactionRole__std</code>	When your transaction is part of a bundle, this value is the role of the primary transaction in the bundle relationship. Valid values are: <ul style="list-style-type: none"> • AddOn • Bundle • Set 	MainBsgRole field on the BsgRelationship object	Optional
<code>AssociatedTransactionRole__std</code>	When your transaction is part of a bundle, this value is the role of the child transaction in the bundle relationship. Valid values are: <ul style="list-style-type: none"> • BundleComponent • ClassificationComponent 	AssociatedBsgRole field on the BsgRelationship object	Optional
<code>AssociatedTransactionPricing__std</code>	When your transaction is part of a bundle, this value describes how the child transaction is priced in relation to the primary transaction. Valid values are: <ul style="list-style-type: none"> • IncludedInBundlePrice • NotIncludedInBundlePrice 	AssociatedBsgPricing field on the BsgRelationship object	Optional
<code>ProductRelationshipTypeId__std</code>	The ID of the Product Relationship Type record that defines the relationship between the primary and child transactions.	ProductRelationshipTypeId field on the BsgRelationship object	Optional

Considerations

Keep these important considerations in mind when you specify the details for renewal transactions.

- The `BillingActionType__std` value for renewal transactions must be `Renew`.
- The quantity for renewal transactions must be a nonzero positive number.
- The start date of the renewal transaction must be before the maximum end date of all the existing billing schedules associated with the billing schedule group.
- The end date of the renewal transaction must be after the maximum end date of all the existing transactions associated with the billing schedule group of the related transaction.
- Specify a `RelatedTransactionId__std` value with a positive quantity.
- For a particular `RelatedTransactionId`, you can create a billing schedule only for a single renewal transaction.

- For renewal transactions, the `TaxTreatmentId__std` value, the `BillingTreatmentId__std` value, and the `LegalEntityId__std` value of the related transaction are considered.

JSON example

This sample includes the transaction data for a renewal.

```
{
  "Transaction": [
    {
      "id": "temp1001",
      "TotalPrice__std": 10,
      "Quantity__std": 1,
      "UnitPrice__std": 10,
      "StartDate__std": "2026-03-01",
      "EndDate__std": "2027-12-31",
      "TransactionId__std": "temp1001",
      "BillingActionType__std": "Renew",
      "RelatedTransactionId__std": "temp1",
      "Transaction_Make__c": "5001",
      "Transaction_Color__c": "Red"
    }
  ]
}
```

This sample shows the request payload to create a billing schedule for a renewal.

```
{
  "transactionDetails": {
    "id": "temp1001", "Price__std": 10, "Quantity__std": 1, "UnitPrice__std": 10, "StartDate__std": "2026-03-01", "EndDate__std": "2027-12-31", "TransactionId__std": "temp1001", "BillingActionType__std": "Renew", "RelatedTransactionId__std": "temp1", "Transaction_Make__c": "5001", "Transaction_Color__c": "Red"
  },
  "transactionContextDetails": {
    "contextDefinitionName": "StandaloneBillingContext__stdctx",
    "intraContextCustomMappingName": "CustomContextMapping",
    "readContextMappingName": "TransactionMapping",
    "saveContextMappingName": "BSGEntitiesMapping"
  }
}
```

Early Renewal Transaction

Understand the required values and key considerations before you create a billing schedule for an early renewal transaction.

When you renew a new-sale transaction before its end date, those transactions are called early renewal transactions. For example, a new-sale transaction starts on 01/01/2025 and ends on 12/31/2025, and you renew it to start on 12/01/2025 and end on 12/31/2026.

When a billing schedule is created for an early renewal transaction, it results in these updates.

- The cancellation date on the original billing schedule is populated.
- A billing schedule with a negative quantity is created and can be used for a refund.
- A billing schedule with a positive quantity is created for the early renewal transaction.

When you're creating a billing schedule for an early renewal transaction, make sure that you provide the mandatory values in the `transactionDetails` property value.

Context Tag in the Transaction Node of the StandaloneBillingContext Context Definition	Description	Mapped Field	Required or Optional
BillToContactId__std	The ID of the Contact record that's related to the transaction.	BillToContactId field on the BillingScheduleGroup object	Optional
ParentTransactionId__std	The ID of the parent transaction record. For example, if the transaction is at a level similar to that of an Order Item record, the parent transaction will be at a level similar to that of an Order record.	If the transaction is a child Order or Quote record, the ReferenceEntityId field on the BillingScheduleobject is populated. For other sObject records or external records, the Reference field on the BillingSchedule object is populated.	Optional
AccountId__std	The ID of the Account record that's related to the transaction.	BillingAccountId field on the BillingScheduleGroup object	Optional
BillingProfileId__std	The ID of the billing profile (Billing Account record) that's related to the transaction. See Billing Profile requirements.	BillingAccountId field on the BillingSchedule object	Optional
BillingState__std	The state in the billing address of the transaction.	BillingState field on the BillingScheduleGroup object	Optional
BillingCity__std	The city in the billing address of the transaction.	BillingCity field on the BillingScheduleGroup object	Optional
BillingStreet__std	The street in the billing address of the transaction.	BillingStreet field on the BillingScheduleGroup object	Optional
BillingPostalCode__std	The postal code in the billing address of the transaction.	BillingPostalCode field on the BillingScheduleGroup object	Optional
BillingCountry__std	The country in the billing address of the transaction.	BillingCountry field on the BillingScheduleGroup object	Optional
ShippingCity__std	The city in the shipping address of the transaction.	ShippingCity field on the BillingScheduleGroup object	Optional

Context Tag in the Transaction Node of the StandaloneBillingContext Context Definition	Description	Mapped Field	Required or Optional
ShippingStreet__std	The street in the shipping address of the transaction.	ShippingStreet field on the BillingScheduleGroup object	Optional
ShippingCountry__std	The country in the shipping address of the transaction.	ShippingCountry field on the BillingScheduleGroup object	Optional
ShippingState__std	The state in the shipping address of the transaction.	ShippingState field on the BillingScheduleGroup object	Optional
ShippingPostalCode__std	The postal code in the shipping address of the transaction.	ShippingPostalCode field on the BillingScheduleGroup object	Optional
SavedPaymentMethodId__std	The ID of the Saved Payment Method record that's used to pay for the invoice that's generated for the transaction.	SavedPaymentMethodId field on the BillingScheduleGroup object	Optional
PaymentTermId__std	The ID of the Payment Term record that's related to the transaction.	PaymentTermId field on the BillingScheduleGroup object	Optional
SellingModelType__std	The selling model type indicates whether the original transaction is for a one-time product, a term-defined product, or an evergreen product.	BillingMethod on the BillingSchedule object	Optional
TransactionId__std	The ID of the transaction that you want to create a billing schedule for.	If the transaction is an OrderItem, OrderItemAdjustmentLineItem, OrderItemDetail, QuoteLineDetail, or QuoteLineItem record, the ReferenceEntityItemId field on the BillingSchedule object is populated. For other sObject records or external records, the ReferenceItem field on the BillingSchedule object is populated.	Required

Context Tag in the Transaction Node of the StandaloneBillingContext Context Definition	Description	Mapped Field	Required or Optional
ProductName__std	The name of the product that's related to the transaction that you want to create a billing schedule for.	ProductName field on the BillingScheduleGroup object	Optional
ProductId__std	The ID of the product that's related to the transaction that you want to create a billing schedule for.	Product2Id field on the BillingScheduleGroup object	Optional
LegalEntityId__std	The legal entity of your company that the transaction comes under. The LegalEntityId of the RelatedTransactionId is considered.	LegalEntityId field on the BillingScheduleGroup object	Optional
PeriodBoundary__std	The period boundary determines the start and end date of the billing period. Valid values are: <ul style="list-style-type: none"> AlignToCalendar Anniversary DayOfPeriod LastDayOfPeriod 	PeriodBoundary field on the BillingScheduleGroup object	Optional
BillingDayOfMonth__std	The day of the month on which a recurring billing process is scheduled to occur for the transaction.	BillDayOfMonth field on the BillingScheduleGroup object	Optional
BillingStartMonth__std	The month when billing begins for an annual subscription. This value can be any number from 1 through 12. For example, if billing starts in January, the value is 1. If billing starts in June, the value is 6.	BillingStartMonth field on the BillingScheduleGroup object	Optional
UnitOfMeasureId__std	The ID of the Unit of Measure record that's used to define the unit for the quantity of the transaction.	UnitOfMeasureId field on the BillingSchedule object	Optional
EndDate__std	The end date of the transaction.	BillingScheduleEndDate field on the BillingSchedule object	Required for a positive transaction. Optional for a negative transaction.
StartDate__std	The start date of the transaction.	BillingScheduleStartDate field on the BillingSchedule object	Required
Quantity__std	The quantity of the transaction.	Quantity field on the BillingSchedule object	Required

Context Tag in the Transaction Node of the StandaloneBillingContext Context Definition	Description	Mapped Field	Required or Optional
TaxTreatmentId__std	The ID of the tax treatment that's used to calculate tax for the transaction. If you don't specify a TaxTreatmentId, the org-default TaxTreatmentId is considered.	TaxTreatmentId field on the BillingScheduleGroup object	Optional
BillingTermUnit__std	The unit of measurement of the billing term. Valid values are: <ul style="list-style-type: none"> • Month • Quarter • Semi-Annual • Year 	BillingTermUnit field on the BillingSchedule object	Optional
BillingTreatmentId__std	The ID of the billing treatment that's used to create the billing schedule for the transaction. The BillingTreatmentId of the RelatedTransactionId is considered.	BillingTreatmentId field on the BillingScheduleGroup object	Optional
CurrencyIsoCode__std	The currency code of the transaction amount if your Salesforce org has multi-currency enabled.	CurrencyIsoCode field on the BillingScheduleGroup object	Required for Salesforce orgs with multiple currencies enabled .
RelatedTransactionId__std	The ID of the transaction against which you're doing an early renewal. This transaction must have a positive quantity.	This value isn't populated on any BillingSchedule or BillingScheduleGroup field.	Required
RampIdentifier__std	When the transaction is part of a ramp deal, the RampIdentifier value is a unique identifier for that ramp. All the transactions with the same RampIdentifier value are grouped to have billing schedules for the same billing schedule group.	This value isn't populated on any BillingSchedule or BillingScheduleGroup field.	Optional
ProrationPolicy__std	The ID of the Proration Policy record that's related to the Product Selling Model Option record of the transaction.	ProrationPolicyId field on the BillingScheduleGroup object	Optional
BillingActionType__std	The action that you want to perform for the transaction. Valid values are: <ul style="list-style-type: none"> • Add • Amend • Renew • Cancel 	Category field on the BillingSchedule object is populated as Renewal.	Required

Context Tag in the Transaction Node of the StandaloneBillingContext Context Definition	Description	Mapped Field	Required or Optional
	Specify <code>Renew</code> as the <code>BillingActionType</code> for early renewal transactions.		
<code>UnitPrice__std</code>	The unit price of the transaction.	<code>UnitPrice</code> field on the <code>BillingSchedule</code> object	Required
<code>TotalPrice__std</code>	The total price of the transaction.	<code>TotalAmount</code> field on the <code>BillingSchedule</code> object	Required
<code>ProductUsageModelType__std</code>	The type of usage model for the transaction product or service. Valid values are: <ul style="list-style-type: none"> <code>Anchor</code>—Anchor is the main subscription product or service. <code>Pack</code>—Pack is the add-on product or service that grants additional usage resources for consumption. 	<code>BillingMethod</code> value field on the <code>BillingSchedule</code> object is populated as <code>OrderAmount</code> .	Optional
<code>NetUnitPrice__std</code>	The net unit price of the transaction.	<code>NetUnitPrice</code> field on the <code>BillingSchedule</code> object	Optional
<code>BindingInstance__std</code>	The ID of the <code>Asset</code> record or custom object record that's related to the transaction.	<code>BindingInstanceId</code> on the <code>BillingScheduleGroup</code> object	Optional
<code>InvoiceRunMatchingValue__std</code>	The batch value that's used to group the billing schedule that's created for the transaction with other billing schedules with the same value. This way, the same invoice run can process both schedules. During an invoice run, billing schedules with the same batch value, including null, are grouped to be processed by the same invoice run.	<code>InvoiceRunMatchingValue</code> field on the <code>BillingSchedule</code> object	Optional
<code>ReferenceRecordId__std</code>	The ID of the <code>Asset</code> record that's related to the transaction.	<code>ReferenceRecordId</code> field on the <code>BillingScheduleGroup</code> object	Optional
<code>CustomInvoiceGroupKey__std</code>	When you want to generate a consolidated invoice for multiple transactions, specify the same <code>CustomInvoiceGroupKey</code> for all these transactions. This key is used to group these transactions together and generate a consolidated invoice for all of them.	<code>CustomInvoiceGroupKey</code> field on the <code>BillingScheduleGroup</code> object	Optional
<code>MainTransactionId__std</code>	When your transaction is part of a bundle, this value is the ID of the child transaction record.	<code>MainBsgId</code> field on the <code>BsgRelationship</code> object	Optional

Context Tag in the Transaction Node of the StandaloneBillingContext Context Definition	Description	Mapped Field	Required or Optional
<code>AssociatedTransactionId_std</code>	When your transaction is part of a bundle, this value is the ID of the child transaction record.	AssociatedBsgId field on the BsgRelationship object	Optional
<code>MainTransactionRole_std</code>	When your transaction is part of a bundle, this value is the role of the primary transaction in the bundle relationship. Valid values are: <ul style="list-style-type: none"> • AddOn • Bundle • Set 	MainBsgRole field on the BsgRelationship object	Optional
<code>AssociatedTransactionRole_std</code>	When your transaction is part of a bundle, this value is the role of the child transaction in the bundle relationship. Valid values are: <ul style="list-style-type: none"> • BundleComponent • ClassificationComponent 	AssociatedBsgRole field on the BsgRelationship object	Optional
<code>AssociatedTransactionPricing_std</code>	When your transaction is part of a bundle, this value describes how the child transaction is priced in relation to the primary transaction. Valid values are: <ul style="list-style-type: none"> • IncludedInBundlePrice • NotIncludedInBundlePrice 	AssociatedBsgPricing field on the BsgRelationship object	Optional
<code>ProductRelationshipTypeId_std</code>	The ID of the Product Relationship Type record that defines the relationship between the primary and child transactions.	ProductRelationshipTypeId field on the BsgRelationship object	Optional

Considerations

Keep these important considerations in mind when you specify the details for early renewal transactions.

- The `BillingActionType_std` value for early renewal transactions must be `Renew`.
- When you're creating billing schedules for early renewal transactions, your input payload must have details for two transactions.
 - A transaction to cancel the existing new-sale transaction. The details of this transaction must include a negative quantity to cancel billing for the remaining period. The quantity for this transaction must be the negative equivalent of the total quantity of all the existing billing schedules associated with the same billing schedule group.
 - Another transaction that specifies the early renewal details, which must have a positive quantity.
 - The `BillingActionType_std` value for both these transactions must be `Renew`.
- The start date of the early renewal transaction must be:
 - Before the end date of the related transaction.

- Before the maximum end date of all the existing billing schedules associated with the billing schedule group of the related transaction.
- The same as the start date of all the existing billing schedules associated with the same billing schedule group or after it.
- The end date for the early renewal transaction must be after the maximum end date of all the existing transactions associated with the billing schedule group of the related transaction.
- For early renewal transactions, the `TaxTreatmentId__std` value, the `BillingTreatmentId__std` value, and the `LegalEntityId__std` value of the related transaction are considered.

JSON example

This sample includes the transaction data for an early renewal.

```
{
  "Transaction": [
    {
      "id": "temp71",
      "TotalPrice__std": -10,
      "Quantity__std": -1,
      "UnitPrice__std": 10,
      "StartDate__std": "2026-12-31",
      "EndDate__std": "2027-12-31",
      "TransactionId__std": "temp71",
      "BillingActionType__std": "Renew",
      "RelatedTransactionId__std": "test21",
      "Transaction_Make__c": "5001",
      "Transaction_Color__c": "Red"
    },
    {
      "id": "temp72",
      "TotalPrice__std": 10,
      "Quantity__std": 1,
      "UnitPrice__std": 10,
      "StartDate__std": "2026-12-31",
      "EndDate__std": "2027-12-31",
      "TransactionId__std": "temp72",
      "BillingActionType__std": "Renew",
      "RelatedTransactionId__std": "test21"
    }
  ]
}
```

This sample shows the request payload to create a billing schedule for an early renewal.

```
{
  "transactionDetails":
  "transactionDetails": {
  "transactionContextDetails": {
    "contextDefinitionName": "StandaloneBillingContext__stdctx",
    "intraContextCustomMappingName": "CustomContextMapping",
    "readContextMappingName": "TransactionMapping",
    "saveContextMappingName": "BSGEntitiesMapping"
  }
}
```

Canceled Transaction

Understand the required values and key considerations before you create a billing schedule for a canceled transaction.

When you're creating a billing schedule for a canceled transaction, make sure that you specify the mandatory values in the `transactionDetails` property value.

Context Tag in the Transaction Node of the StandaloneBillingContext Context Definition	Description	Mapped Field	Required or Optional
<code>BillToContactId__std</code>	The ID of the Contact record that's related to the transaction.	<code>BillToContactId</code> field on the <code>BillingScheduleGroup</code> object	Optional
<code>ParentTransactionId__std</code>	The ID of the parent transaction record. For example, if the transaction is at a level similar to that of an Order Item record, the parent transaction will be at a level similar to that of an Order record.	If the transaction is a child Order or Quote record, the <code>ReferenceEntityId</code> field on the <code>BillingScheduleobject</code> is populated. For other <code>sObject</code> records or external records, the <code>Reference</code> field on the <code>BillingSchedule</code> object is populated.	Optional
<code>AccountId__std</code>	The ID of the Account record that's related to the transaction.	<code>BillingAccountId</code> field on the <code>BillingScheduleGroup</code> object	Optional
<code>BillingProfileId__std</code>	The ID of the billing profile (Billing Account record) that's related to the transaction. See Billing Profile requirements.	<code>BillingAccountId</code> field on the <code>BillingSchedule</code> object	Optional
<code>BillingState__std</code>	The state in the billing address of the transaction.	<code>BillingState</code> field on the <code>BillingScheduleGroup</code> object	Optional
<code>BillingCity__std</code>	The city in the billing address of the transaction.	<code>BillingCity</code> field on the <code>BillingScheduleGroup</code> object	Optional
<code>BillingStreet__std</code>	The street in the billing address of the transaction.	<code>BillingStreet</code> field on the <code>BillingScheduleGroup</code> object	Optional
<code>BillingPostalCode__std</code>	The postal code in the billing address of the transaction.	<code>BillingPostalCode</code> field on the <code>BillingScheduleGroup</code> object	Optional

Context Tag in the Transaction Node of the StandaloneBillingContext Context Definition	Description	Mapped Field	Required or Optional
BillingCountry__std	The country in the billing address of the transaction.	BillingCountry field on the BillingScheduleGroup object	Optional
ShippingCity__std	The city in the shipping address of the transaction.	ShippingCity field on the BillingScheduleGroup object	Optional
ShippingStreet__std	The street in the shipping address of the transaction.	ShippingStreet field on the BillingScheduleGroup object	Optional
ShippingCountry__std	The country in the shipping address of the transaction.	ShippingCountry field on the BillingScheduleGroup object	Optional
ShippingState__std	The state in the shipping address of the transaction.	ShippingState field on the BillingScheduleGroup object	Optional
ShippingPostalCode__std	The postal code in the shipping address of the transaction.	ShippingPostalCode field on the BillingScheduleGroup object	Optional
SavedPaymentMethodId__std	The ID of the Saved Payment Method record that's used to pay for the invoice that's generated for the transaction.	SavedPaymentMethodId field on the BillingScheduleGroup object	Optional
PaymentTermId__std	The ID of the Payment Term record that's related to the transaction.	PaymentTermId field on the BillingScheduleGroup object	Optional
SellingModelType__std	The selling model type indicates whether the original transaction is for a one-time product, a term-defined product, or an evergreen product.	BillingMethod on the BillingSchedule object	Optional
TransactionId__std	The ID of the transaction that you want to create a billing schedule for.	If the transaction is an OrderItem, OrderItemAdjustmentLineItem, OrderItemDetail, QuoteLineDetail, or QuoteLineItem record, the ReferenceEntityItemId field on the	Required

Context Tag in the Transaction Node of the StandaloneBillingContext Context Definition	Description	Mapped Field	Required or Optional
		BillingScheduleobject is populated. For other sObject records or external records, the Referenceltem field on the BillingSchedule object is populated.	
ProductName__std	The name of the product that's related to the transaction that you want to create a billing schedule for.	ProductName field on the BillingScheduleGroup object	Optional
ProductId__std	The ID of the product that's related to the transaction that you want to create a billing schedule for.	Product2Id field on the BillingScheduleGroup object	Optional
LegalEntityId__std	The legal entity of your company that the transaction comes under. The LegalEntityId of the RelatedTransactionId is considered.	LegalEntityId field on the BillingScheduleGroup object	Optional
PeriodBoundary__std	The period boundary determines the start and end date of the billing period. Valid values are: <ul style="list-style-type: none"> AlignToCalendar Anniversary DayOfPeriod LastDayOfPeriod 	PeriodBoundary field on the BillingScheduleGroup object	Optional
BillingDayOfMonth__std	The day of the month on which a recurring billing process is scheduled to occur for the transaction.	BillDayOfMonth field on the BillingScheduleGroup object	Optional
BillingStartMonth__std	The month when billing begins for an annual subscription. This value can be any number from 1 through 12. For example, if billing starts in January, the value is 1. If billing starts in June, the value is 6.	BillingStartMonth field on the BillingScheduleGroup object	Optional
UnitOfMeasureId__std	The ID of the Unit of Measure record that's used to define the unit for the quantity of the transaction.	UnitOfMeasureId field on the BillingSchedule object	Optional
EndDate__std	The end date of the transaction.	BillingScheduleEndDate field on the BillingSchedule object	Optional

Context Tag in the Transaction Node of the StandaloneBillingContext Context Definition	Description	Mapped Field	Required or Optional
StartDate__std	The start date of the transaction.	BillingScheduleStartDate field on the BillingSchedule object	Required
Quantity__std	The quantity of the transaction.	Quantity field on the BillingSchedule object	Optional
TaxTreatmentId__std	The ID of the tax treatment that's used to calculate tax for the transaction. If you don't specify a TaxTreatmentId, the org-default TaxTreatmentId is considered.	TaxTreatmentId field on the BillingScheduleGroup object	Optional
BillingTermUnit__std	The unit of measurement of the billing term. Valid values are: <ul style="list-style-type: none"> • Month • Quarter • Semi-Annual • Year 	BillingTermUnit field on the BillingSchedule object	Optional
BillingTreatmentId__std	The ID of the billing treatment that's used to create the billing schedule for the transaction. The BillingTreatmentId of the RelatedTransactionId is considered.	BillingTreatmentId field on the BillingScheduleGroup object	Optional
CurrencyIsoCode__std	The currency code of the transaction amount if your Salesforce org has multi-currency enabled.	CurrencyIsoCode field on the BillingScheduleGroup object	Required for Salesforce orgs with multiple currencies enabled .
RelatedTransactionId__std	The ID of the transaction that's related to the original transaction.	This value isn't populated on any BillingSchedule or BillingScheduleGroup field.	Required
RampIdentifier__std	When the transaction is part of a ramp deal, the RampIdentifier value is a unique identifier for that ramp. All the transactions with the same RampIdentifier value are grouped to have billing schedules for the same billing schedule group.	This value isn't populated on any BillingSchedule or BillingScheduleGroup field.	Optional
ProrationPolicy__std	The ID of the Proration Policy record that's related to the Product Selling Model Option record of the transaction.	ProrationPolicyId field on the BillingScheduleGroup object	Optional
BillingActionType__std	The action that you want to perform for the transaction. Valid values are:	Category field on the BillingSchedule object is	Required

Context Tag in the Transaction Node of the StandaloneBillingContext Context Definition	Description	Mapped Field	Required or Optional
	<ul style="list-style-type: none"> Add Amend Renew c <p>Specify <code>Cancel</code> as the <code>BillingActionType</code> for canceled transactions.</p>	populated as Cancellation.	
<code>UnitPrice__std</code>	The unit price of the transaction.	UnitPrice field on the BillingSchedule object	Required
<code>TotalPrice__std</code>	The total price of the transaction.	TotalAmount field on the BillingSchedule object	Required
<code>ProductUsageModelType__std</code>	<p>The type of usage model for the transaction product or service. Valid values are:</p> <ul style="list-style-type: none"> <code>Anchor</code>—Anchor is the main subscription product or service. <code>Pack</code>—Pack is the add-on product or service that grants additional usage resources for consumption. 	BillingMethod value field on the BillingSchedule object is populated as OrderAmount.	Optional
<code>NetUnitPrice__std</code>	The net unit price of the transaction.	NetUnitPrice field on the BillingSchedule object	Optional
<code>BindingInstance__std</code>	The ID of the Asset record or custom object record that's related to the transaction.	BindingInstanceId on the BillingScheduleGroup object	Optional
<code>InvoiceRunMatchingValue__std</code>	The batch value that's used to group the billing schedule that's created for the transaction with other billing schedules with the same value. This way, the same invoice run can process both schedules. During an invoice run, billing schedules with the same batch value, including null, are grouped to be processed by the same invoice run.	InvoiceRunMatchingValue field on the BillingSchedule object	Optional
<code>ReferenceRecordId__std</code>	The ID of the Asset record that's related to the transaction.	ReferenceRecordId field on the BillingScheduleGroup object	Optional
<code>CustomInvoiceGroupKey__std</code>	When you want to generate a consolidated invoice for multiple transactions, specify the same CustomInvoiceGroupKey for all these transactions.	CustomInvoiceGroupKey field on the BillingScheduleGroup object	Optional

Context Tag in the Transaction Node of the StandaloneBillingContext Context Definition	Description	Mapped Field	Required or Optional
	This key is used to group these transactions together and generate a consolidated invoice for all of them.		
<code>MainTransactionId__std</code>	When your transaction is part of a bundle, this value is the ID of the child transaction record.	MainBsgId field on the BsgRelationship object	Optional
<code>AssociatedTransactionId__std</code>	When your transaction is part of a bundle, this value is the ID of the child transaction record.	AssociatedBsgId field on the BsgRelationship object	Optional
<code>MainTransactionRole__std</code>	When your transaction is part of a bundle, this value is the role of the primary transaction in the bundle relationship. Valid values are: <ul style="list-style-type: none"> • AddOn • Bundle • Set 	MainBsgRole field on the BsgRelationship object	Optional
<code>AssociatedTransactionRole__std</code>	When your transaction is part of a bundle, this value is the role of the child transaction in the bundle relationship. Valid values are: <ul style="list-style-type: none"> • BundleComponent • ClassificationComponent 	AssociatedBsgRole field on the BsgRelationship object	Optional
<code>AssociatedTransactionPricing__std</code>	When your transaction is part of a bundle, this value describes how the child transaction is priced in relation to the primary transaction. Valid values are: <ul style="list-style-type: none"> • IncludedInBundlePrice • NotIncludedInBundlePrice 	AssociatedBsgPricing field on the BsgRelationship object	Optional
<code>ProductRelationshipTypeId__std</code>	The ID of the Product Relationship Type record that defines the relationship between the primary and child transactions.	ProductRelationshipTypeId field on the BsgRelationship object	Optional

Considerations

Keep these important considerations in mind when you provide the details for canceled transactions.

- The `BillingActionType__std` value for any amended transaction must be `Cancel`.
- If you provide a quantity, make sure that it matches the total quantity of the related transaction.
- If there are multiple canceled transactions associated with the same related transaction, specify the same start date for all of these transactions.
- Specify the canceled transaction details for all the billing schedules that are associated with the same billing schedule group.

- If your transaction is for an sObject record, only specify the record ID as the id value in the `transactionDetails` property value. All the other transaction details are automatically fetched from the sObject record if those details are mapped in the context definition.

JSON example

This sample includes the transaction data for a cancellation.

```
{
  "Transaction": [
    {
      "id": "termedCancel1",
      "ParentTransactionId__std": "sample",
      "TransactionId__std": "termedCancel1",
      "RelatedTransactionId__std": "ot1",
      "StartDate__std": "2025-03-01",
      "UnitPrice__std": 10,
      "TotalPrice__std": -50,
      "BillingActionType__std": "Cancel",
      "Transaction_Make__c": "6001",
      "Transaction_Color__c": "Black"
    }
  ]
}
```

This sample shows the request payload to create a billing schedule for a cancellation.

```
{
  "transactionDetails": {
    "id": "001SG000004Fv1GYAS",
    "BusinessSubjectType": "Account",
    "Quantity": 4,
    "Name": "TestAccount"
  },
  "transactionContextDetails": {
    "contextDefinitionName": "StandaloneBillingContext__stdctx",
    "intraContextCustomMappingName": "CustomContextMapping",
    "readContextMappingName": "TransactionMapping",
    "saveContextMappingName": "BSGEntitiesMapping"
  }
}
```

Context-Aware Standalone Billing Schedule Metadata Input

Input representation of the metadata details to create a billing schedule. This representation includes the name of the context definition and context mapping along with the mapping details of the transaction, billing schedule, and billing schedule group.

JSON example

```
{
  "transactionDetails": "{ \"nodeName\": [{ \"id\": \"001SG000004Fv1GYAS\", \"businessSubjectType\": \"Account\", \"Quantity\": \"4\", \"Name\": \"TestAccount\" } ] }",
  "transactionContextDetails": {
    "contextDefinitionName": "StandaloneBillingContext",
    "intraContextCustomMappingName": "CustomContextMapping",
    "readContextMappingName": "OrderTransactionMapping",
    "saveContextMappingName": "BSGEntitiesMapping"
  }
}
```

```
}
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
context Definition Name	String	Name of the context definition that's used to hydrate the context to generate the billing schedule.	Required	64.0
intraContext CustomMapping Name	String	Name of the cross-context custom mapping that's used to map Billing fields to Transaction fields. Use this mapping to populate the Billing fields with the values stored in custom transaction fields.	Optional	65.0
readContext MappingName	String	Name of the context mapping with the mapping for the transaction.	Required	64.0
saveContext MappingName	String	Name of the context mapping with the mapping for the billing schedule and billing schedule group.	Required	64.0

Convert Negative Invoice Lines Input

Input representation of the details of the request to convert a list of negative invoice lines into a credit.

JSON example

```
{
  "invoiceLines": ["5TVxx0000004C92GAE", "5TVxx0000004C93GAE"],
  "description": "Convert negative invoice lines into credit",
  "effectiveDate": "2022-05-18"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
description	String	Description stamped on the credit memo that's created after the negative invoice line conversion.	Optional	62.0
effectiveDate	String	Date stamped on the credit memo that's created after the negative invoice line conversion.	Required	62.0
invoiceLines	String[]	Complete list of the negative invoice lines along with the associated invoice line	Optional	62.0

Name	Type	Description	Required or Optional	Available Version
		taxes. The specified negative invoice lines are converted into a posted credit memo.		

Credit Invoice Input

Input representation of the details of the request to create a credit memo.

JSON example

This example shows a sample request with the `Calculate` tax strategy.

```
{
  "type": "POSTED",
  "taxStrategy": "Calculate",
  "taxEffectiveDate": "2024-07-20",
  "effectiveDate": "2024-07-20",
  "description": "Credit Invoice",
  "invoiceLines": [
    {
      "invoiceLineId": "5TVR00000004SiqOBE",
      "amountToCredit": 5
    }
  ]
}
```

This example shows a sample request with the `CopyFromInvoiceLine` tax strategy.

```
{
  "type": "POSTED",
  "taxStrategy": "CopyFromInvoiceLine",
  "effectiveDate": "2020-05-22",
  "description": "Credit Invoice",
  "invoiceLines": [
    {
      "invoiceLineId": "5TVR00000004SiqOBE",
      "amountToCredit": "5",
      "taxStrategy": "CopyFromInvoiceLine"
    }
  ]
}
```

This example shows a sample request with the `ManualOverride` and `CopyFromInvoiceLine` tax strategies.

```
{
  "type": "POSTED",
  "taxStrategy": "ManualOverride",
  "taxEffectiveDate": "2021-08-01",
  "effectiveDate": "2021-08-01",
  "description": "Credit issued because product was malfunctioning.",
  "invoiceLines": [
    {
      "invoiceLineId": "5TVR00000004SiqOBE",
      "amountToCredit": 100,

```

```

"taxStrategy": "ManualOverride",
"taxEffectiveDate": "2021-08-01T21:22:41.000Z",
"taxes": [
  {
    "taxAmount": 15,
    "taxName": "abc",
    "taxCode": "taxCode",
    "taxRate": 7
  }
],
"addresses": {
  "billingAddress": {
    "street": "1 Market St #300",
    "city": "San Francisco",
    "state": "CA",
    "country": "US",
    "postalCode": "94105",
    "latitude": "37.789901",
    "longitude": "-122.396923"
  },
  "shippingAddress": {
    "street": "415 Mission St",
    "city": "San Francisco",
    "state": "CA",
    "country": "US",
    "postalCode": "94105",
    "latitude": "37.789901",
    "longitude": "-122.396923"
  }
},
{
  "invoiceLineId": "5TVR00000004SiqOAE",
  "amountToCredit": 200,
  "taxStrategy": "CopyFromInvoiceLine"
}
]
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
description	String	Description for the credit memo to be created.	Optional	62.0
effectiveDate	String	Date when the credit memo takes effect.	Optional	62.0
invoiceLines	Credit Invoice Line Input[]	List of the invoice lines to be credited. The invoice line IDs must be related to the invoice ID specified in the API request. If invoice lines aren't specified, the API request results in an error.	Required	62.0

Name	Type	Description	Required or Optional	Available Version
taxEffectiveDate	String	Date when the tax takes effect to recalculate the taxes.	Optional	62.0
taxStrategy	String	Tax strategy to be applied across invoice lines. You can override the tax strategy at the individual invoice line level or at the tax line level. Valid values are: <ul style="list-style-type: none"> Ignore—Specifies that the creation of tax lines must be ignored. ManualOverride—Specifies that the provided tax values must be considered for taxes. CopyFromInvoiceLine—Specifies that tax values must be copied from the invoice line. Calculate—Specifies that tax must be calculated by using the API. 	Required	62.0
type	String	Type of credit memo to be created. Valid value is <code>Posted</code> .	Optional	62.0

Credit Invoice Line Input

Input representation of the details of the invoice lines to be credited.

JSON example

```
"invoiceLines": [
  {
    "invoiceLineId": "5TVR00000004SiqOBE",
    "amountToCredit": 100,
    "taxStrategy": "ManualOverride",
    "taxEffectiveDate": "2021-08-01T21:22:41.000Z",
    "taxes": [
      {
        "taxAmount": 15,
        "taxName": "abc",
        "taxCode": "taxCode",
        "taxRate": 7
      }
    ],
    "addresses": {
      "billingAddress": {
        "street": "1 Market St #300",
        "city": "San Francisco",
        "state": "CA",
        "country": "US",
        "postalCode": "94105",
```

```

        "latitude": "37.789901",
        "longitude": "-122.396923"
    },
    "shippingAddress": {
        "street": "415 Mission St",
        "city": "San Francisco",
        "state": "CA",
        "country": "US",
        "postalCode": "94105",
        "latitude": "37.789901",
        "longitude": "-122.396923"
    }
},
{
    "invoiceLineId": "5TVR00000004SiqOAE",
    "amountToCredit": 200,
    "taxStrategy": "CopyFromInvoiceLine"
}
]

```

Properties

Name	Type	Description	Required or Optional	Available Version
addresses	Credit Memo Addresses Input[]	Addresses to be created manually for this invoice line and the overridden tax lines. These addresses are only applicable if this invoice line is using the <code>ManualOverride</code> tax strategy.	Optional	62.0
amountToCredit	Double	Amount to be credited from this invoice line.	Required	62.0
invoiceLineId	String	ID of the invoice line record to be credited. The invoice line ID must be related to the invoice ID specified in the API request.	Required	62.0
isTaxOnlyCredit	Boolean	Indicates whether the applicable tax amount is credited for the charge or adjustment amount (<code>true</code>), or the applicable tax amount is credited along with the charge or adjustment amount (<code>false</code>). The default value is <code>false</code> .	Optional	62.0
taxEffectiveDate	String	Date when the tax takes effect and the invoice line is credited.	Optional	62.0
taxStrategy	String	Tax strategy for crediting the invoice line. This tax strategy takes precedence over the <code>taxStrategy</code> property value specified in the Credit Invoice Input . Valid values are:	Optional	62.0

Name	Type	Description	Required or Optional	Available Version
		<ul style="list-style-type: none"> Ignore—Specifies that the creation of tax lines must be ignored. ManualOverride—Specifies that the provided tax values must be considered for taxes. CopyFromInvoiceLine—Specifies that tax values must be copied from the invoice line. Calculate—Specifies that tax must be calculated by using the API. 		
taxes	Credit Invoice Line Tax Input[]	List of tax lines to be created manually for this invoice line.	Required if the taxStrategy property value is ManualOverride.	62.0

Credit Invoice Line Tax Input

Input representation of the details of the tax lines to be created manually for the invoice line.

JSON example

```

"taxes": [
  {
    "taxAmount": 15,
    "taxName": "abc",
    "taxCode": "taxCode",
    "taxRate": 7
  }
]

```

Properties

Name	Type	Description	Required or Optional	Available Version
taxAmount	Double	Amount of tax to be applied related to this invoice line.	Required	62.0
taxCode	String	Tax code to be applied related to this invoice line to create the tax line.	Optional	62.0
taxName	String	Name of tax to be applied related to this invoice line.	Optional	62.0
taxRate	Double	Tax rate used to create the tax line.	Optional	62.0

Credit Memo Addresses Input

Input representation of the details of the billing and shipping addresses.

JSON example

```
{
  "billingAddress": {
    "street": "1 Market St #300",
    "city": "San Francisco",
    "state": "CA",
    "country": "US",
    "postalCode": "94105",
    "latitude": "37.789901",
    "longitude": "-122.396923"
  },
  "shippingAddress": {
    "street": "415 Mission St",
    "city": "San Francisco",
    "state": "CA",
    "country": "US",
    "postalCode": "94105",
    "latitude": "37.789901",
    "longitude": "-122.396923"
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
billing Address	Address Input[]	Billing address for charge or adjustment line.	Optional	62.0
shipping Address	Address Input[]	Shipping address for charge or adjustment line.	Optional	62.0

Credit Memo Apply Input

Input representation of the request to apply a credit memo to an invoice.

JSON example

```
{
  "applications": [
    {
      "appliedToId": "3ttxx000000003FAAQ",
      "amount": 10,
      "description": "Apply to invoice for refund",
      "effectiveDate": "2024-07-01"
    },
    {
      "appliedToId": "3ttxx0000000001AAA",
      "amount": 100
    }
  ]
}
```

```

    }
  ]
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
applications	Credit Memo Apply Application Input[]	List of one or more applications to apply the credit memo for. Each application represents an invoice that's credited by using the balance of the specified credit memo.	Required	62.0

Credit Memo Apply Application Input

Input representation of the request to specify one or more applications to apply a credit memo for, with each application representing an invoice.

JSON example

```

"applications": [
  {
    "appliedToId": "3ttxx000000003FAAQ",
    "amount": 10,
    "description": "Apply to invoice for refund",
    "effectiveDate": "2024-07-01"
  },
  {
    "appliedToId": "3ttxx0000000001AAA",
    "amount": 100
  }
]

```

Properties

Name	Type	Description	Required or Optional	Available Version
amount	Double	Credit amount to be applied to the invoice.	Required	62.0
appliedToId	String	ID of the invoice record to apply the credit for.	Required	62.0
description	String	Explanation or reason for applying the credit memo.	Optional	62.0
effectiveDate	String	Effective date for the credit memo.	Optional	62.0

Credit Memo Draft to Posted Input

Input representation of the request to post a draft credit memo.

JSON example

```
{
  "creditMemoIds": ["50gDU00000001MnYAI"]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
correlationId	String	Splunk correlation ID to use to track messages that are related to the request and logged in Splunk by the different services involved in the request. If not specified, the service creates a random Universally Unique Identifier (UUID).	Optional	65.0
creditMemoIds	String[]	ID of the credit memo record in <code>Draft</code> status to be posted. You can post one draft credit memo per API request.	Required	65.0

Credit Memo Unapply Input

Input representation of the request to unapply a credit memo from an invoice.

JSON example

```
{
  "description": "Unapply credit memo from invoice to revert an error",
  "effectiveDate": "2024-07-01"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
description	String	Explanation or reason for unapplying the credit memo.	Optional	62.0
effectiveDate	String	Effective date for the credit memo.	Optional	62.0

Credit Memo Line Apply Input

Input representation of the details of the request to apply a credit memo line to an invoice line.

JSON example

```
{
  "applyCreditDetails": [
    {
```

```

"invoiceLineId": "5TVSG0000002ZJR4A2",
"appliedAmount": 5,
"description": "Apply to invoice line 1",
"effectiveDate": "2024-07-01"
},
{
"invoiceLineId": "5TVSG0000002ZJS4A2",
"appliedAmount": 10,
"description": "Apply to invoice line 2",
"effectiveDate": "2024-07-01"
}
]
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
applyCreditDetails	Credit Memo Line Application Input[]	List of one or more applications to apply the credit memo line for. Each application represents an invoice line that's credited by using the balance of the specified credit memo line.	Required	62.0

Credit Memo Line Application Input

Input representation of the request to specify one or more applications to apply a credit memo line for, with each application representing an invoice line.

JSON example

```

"applyCreditDetails": [
{
"invoiceLineId": "5TVSG0000002ZJR4A2",
"appliedAmount": 5,
"description": "Apply to invoice line 1",
"effectiveDate": "2024-07-01"
},
{
"invoiceLineId": "5TVSG0000002ZJS4A2",
"appliedAmount": 10,
"description": "Apply to invoice line 2",
"effectiveDate": "2024-07-01"
}
]

```

Properties

Name	Type	Description	Required or Optional	Available Version
appliedAmount	Double	Credit amount to be applied to the invoice line.	Required	62.0
description	String	Explanation or reason for applying the credit memo line.	Optional	62.0
effectiveDate	String	Effective date for the credit memo line.	Optional	62.0
invoiceLineId	String	ID of the invoice line record to apply the credit for.	Required	62.0

Credit Memo Line Unapply Input

Input representation of the details of the request to unapply a credit memo line from an invoice line.

JSON example

```
{
  "description": "Unapply a credit memo line from invoice line 1",
  "effectiveDate": "2024-07-01"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
description	String	Explanation or reason for unapplying the credit memo line.	Optional	62.0
effectiveDate	String	Effective date for the credit memo line.	Optional	62.0

Customer Details Input

Input representation of the customer details for tax calculation.

JSON example

```
{
  "accountId": "001R000000000zSMAQ"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
accountId	String	Salesforce account ID of the customer.	Optional	62.0

Frequency Cadence Options

Input representation of the frequency cadence options for an invoice scheduler.

JSON example

```
"frequencyCadenceOptions": {
  "recurringSubType" : "Every",
  "recursOn" : "First",
  "recursOnDay" : "Sunday",
  "shouldExcludeWkendAndHldy": true
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
recurringSubType	String	Subtype of the recurring frequency for the invoice run. Valid values are: <ul style="list-style-type: none"> • Every—Specifies if the invoice scheduler must generate the invoices on a recurring frequency on a specific cadence. Use this value to generate invoices on a specific day of the month. For example, you can specify that the invoice scheduler must generate the invoices every first Monday of the month. • SpecificDate—Specifies if the invoice scheduler must generate the invoices on a recurring frequency on a specific date. Use this value to generate invoices on a monthly basis on a specific date. 	Required if the frequency Cadence property is set to Monthly.	62.0
recursOn	String	Cadence that specifies when the invoice scheduler must generate the invoices on a recurring frequency. For example, you can specify that the invoice scheduler must generate the invoices every first Monday of the month. Valid values are: <ul style="list-style-type: none"> • First • Second • Third • Fourth • Last 	Required if the frequency Cadence property is set to Monthly.	62.0

Name	Type	Description	Required or Optional	Available Version
<code>recursOnDate</code>	String	Date when the invoice scheduler must generate the invoices on a specific date. The supported values are: <ul style="list-style-type: none"> • 1 through 28—Specify any date from 1 through 28. • L—Specifies that the invoice scheduler must generate the invoices on the last day of the month. • L-1—Specifies that the invoice scheduler must generate the invoices on the second to last day of the month. • L-2—Specifies that the invoice scheduler must generate the invoices on the third to last day of the month. 	Required if the <code>recurringSubType</code> property is set to <code>SpecificDate</code> .	62.0
<code>recursOnDay</code>	String	Day of the week when the invoice scheduler must generate the invoices on a recurring frequency. For example, you can specify that the invoice scheduler must generate the invoices every Monday or every first Monday of a month. Valid values are: <ul style="list-style-type: none"> • Sunday • Monday • Tuesday • Wednesday • Thursday • Friday • Saturday 	Required if the <code>frequencyCadence</code> property is set to <code>Weekly</code> or <code>Monthly</code> .	62.0
<code>shouldExcludeWkendAndHldy</code>	Boolean	Indicates whether to exclude weekends and holidays from the billing schedule (<code>true</code>) or not (<code>false</code>).	Required if the <code>frequencyCadence</code> property is set to <code>Monthly</code> .	62.0

Graph Record for Invoice Ingestion

A Graph record is an object that's a part of the graph structure, representing both the fields and relationships among different objects. Each record in the graph can contain attributes, which are fields of the object, and references to other related records.

Invoice ingestion supports a Graph record count of 500. The supported Graph attribute types for invoice ingestion are Account, Contact, Invoice, InvoiceLine, InvoiceLineTax, and InvoiceAddressGroup.

A Graph record has these properties and associated fields.

Field	Description
referenceId	Unique identifier of the record that's used to reference the record in the graph.
record	Object containing the actual data for the record.
record.attributes.type	Standard object of the record being referenced. In this scenario, this field indicates an InvoiceAddressGroup attribute type.
record.attributes.method	Method that defines the operation on the record. For example, POST to create a record, PUT to update a record, or GET to get record data.

JSON example

```
{
  "referenceId": "refBillingAddress",
  "record": {
    "attributes": {
      "type": "InvoiceAddressGroup",
      "method": "POST"
    },
    //Contains the actual data
  }
}
```

Account Record

Keep these considerations in mind when you specify an Account record as the Graph attribute type.

- The supported Graph attribute method is GET only.
- The supported record count that you can specify for Account is one only.
- The id field on attributes is the value of the externalId field API Name in [Account](#). This field can be used to resolve the Salesforce Account ID from the custom external ID field. See [Use an 'External ID' to set the values for audit fields](#).

JSON example

```
{
  "referenceId": "refAccount",
  "record": {
    "attributes": {
      "type": "Account",
      "method": "GET",
      "id": "AccountId__c/7661eaaf-f527-4dcf-beb3-301f3eddc9e"
    }
  }
}
```

Contact Record

Keep these considerations in mind when you specify a Contact record as the Graph attribute type.

- The supported Graph attribute method is GET only.
- The supported record count that you can specify for Contact is one only.
- The id field on attributes is the value of the externalId field API Name in [Contact](#). This field can be used to resolve the Salesforce Contact ID from the custom external ID field. See [Use an 'External ID' to set the values for audit fields](#).

JSON example

```
{
  "referenceId": "refContact",
  "record": {
    "attributes": {
      "type": "Contact",
      "method": "GET",
      "id": "ContactId__c/7661eaaf-f527-4dcf-beb3-301f3eddc9e"
    }
  }
}
```

Invoice Record

Keep these considerations in mind when you specify an Invoice record as the Graph attribute type.

- The supported Graph attribute method is POST only.
- The supported record count that you can specify for Invoice is one only.
- An invoice with `Draft` status can't have a posted date.
- An invoice with `Draft` status can't be used if the `taxCalculationStatus` property is set to `Posted`. The `taxCalculationStatus` property must be set to `Estimated` or `Pending`.
- An invoice with `Posted` status can't be used if the `shouldCalculateTax` property is set to `true`.
- An invoice with `Posted` status can't include the `Estimated` or `Pending` as the `taxCalculationStatus` property values. The tax processing status must be `Posted`.
- An invoice with `Posted` status with an invoice line marked as `taxable` must include an `invoiceLineTax` for that invoice line.
- An invoice with `Posted` status with an invoice line marked as `nontaxable` must not include an `invoiceLineTax` for that invoice line.
- The `invoice.CreationMode` field is set to `External`. This field differentiates the invoices created from a billing schedule or an invoice ingestion. For invoices created from a billing schedule, the value is `Salesforce`. For invoices created from an invoice ingestion, the value is set to `External`.
- The due date of an invoice graph must be set in the future or with a valid payment term, or your Salesforce org has a default payment term set.

JSON example

```
{
  "referenceId": "refInvoice",
  "record": {
    "attributes": {
      "type": "Invoice",
      "method": "POST"
    },
    "invoiceDate": "2024-01-01",
    "billingAccountId": "001xx000003Dzo9AAC",
  }
}
```

```

    "billToContactId": "003xx000004TzFoAAI",
    "paymentTermId": "20Xxx0000004CFUGA2",
    "referenceEntityId": "801xx000003GeQQAA0",
    "status": "Draft",
    "currencyIsoCode": "USD",
    "dueDate": "2024-02-01",
    "postedDate": "2024-01-02",
    "invoiceNumber": "INV-12345",
    "uniqueIdentifier": "1a9380c1-8042-422d-bcc5-70c3f51c2588",
    "description": "Consulting Services"
  }
}

```

Table 1: Properties

NAME	Standard Object Field	Description	Required or Optional
invoiceDate	Invoice.invoiceDate	Date when the invoice was created or issued.	Required
billingAccountId	Invoice.billingAccountId	Billing account associated with this invoice, which can be resolved with the <code>externalId</code> field by using the GET method.	Required
billToContactId	Invoice.billToContactId	Contact person to whom the invoice is billed, which can be resolved with the <code>externalId</code> field by using the GET method.	Required
paymentTermId	Invoice.paymentTermId	Payment term associated with the invoice.	Optional
referenceEntityId	Invoice.referenceEntityId	Reference to a related object, if applicable.	Optional
status	Invoice.status	Current status of the invoice. Valid values are: <ul style="list-style-type: none"> • Draft • Posted. The default value is <code>Draft</code> .	Optional
currencyIsoCode	Invoice.currencyIsoCode	ISO code representing the currency of the invoice. This property must be specified if multi-currency is enabled in the organization.	Optional
dueDate	Invoice.dueDate	Due date for the invoice payment.	Optional
postedDate	Invoice.postedDate	Date the invoice was posted to the system. Until API version 64.0, the default value is the current date irrespective of the value that's specified in the input payload. In API version 65.0 and later, the posted date specified in the input payload is considered.	Required in API version 65.0 and later.
invoiceNumber	Invoice.invoiceNumber	Unique identifier for the invoice.	Optional

NAME	Standard Object Field	Description	Required or Optional
uniqueIdentifier	Invoice.uniqueIdentifier	Unique identifier for the invoice. This property is used as the idempotency key to avoid duplicate invoice generation.	Optional
description	Invoice.description	Short description of the invoice or the billed items.	Optional

Invoice Line Record

Keep these considerations in mind when you specify an Invoice Line record as the Graph attribute type.

- The supported Graph attribute method is POST only.
- The Graph must include at least one Graph record with the InvoiceLine attribute type.
- The invoice line end date must be greater than or equal to the invoice line start date.

JSON example

```
{
  "referenceId": "refInvoiceLine",
  "record": {
    "attributes": {
      "type": "InvoiceLine",
      "method": "POST"
    },
    "name": "Parle G",
    "invoiceLineStartDate": "2024-01-01",
    "invoiceLineEndDate": "2024-01-31",
    "quantity": 10,
    "unitPrice": 25,
    "chargeAmount": 250,
    "invoiceId": "@{refInvoice.id}",
    "shippingAddressId": "@{refShippingAddress.id}",
    "billingAddressId": "@{refBillingAddress.id}",
    "referenceEntityItemId": "802xx000001neB9AAI",
    "taxTreatmentId": "1ttxx000000BOTAA2",
    "legalEntityId": "0fwxx000000001AAA",
    "legalEntityAccountingPeriodId": "1HLxx0000004C92GAE",
    "product2Id": "01ttx0000006ic4AAA",
    "usageProductId": "01ttx0000006ic5AAA",
    "isUsageBasedInvoiceLine": false,
    "usageOverageQuantity": 5,
    "unitOfMeasureId": "0hexx000000001EAA",
    "description": "Sample product description"
  }
}
```

Table 2: Properties

NAME	Standard Object Field	Description	Required or Optional
name	InvoiceLine.name	Name or description of the invoice line item.	Required

NAME	Standard Object Field	Description	Required or Optional
invoiceLineStartDate	InvoiceLine.invoiceLineStartDate	Start date for the invoice line period. For example, the date when the product or service is provided.	Required
invoiceLineEndDate	InvoiceLine.invoiceLineEndDate	End date for the invoice line period. For example, the date when the product or service ends.	Required
quantity	InvoiceLine.quantity	Quantity of the product or billed service in this invoice line.	Required
unitPrice	InvoiceLine.unitPrice	Price per unit of the product or billed service.	Required
chargeAmount	InvoiceLine.chargeAmount	Total charge amount for this invoice line, which is calculated as quantity * unit price.	Required
invoiceId	InvoiceLine.invoiceId	Reference to the invoice that this invoice line is associated with.	Required
shippingAddressId	InvoiceLine.shippingAddressId	Shipping address associated with this invoice line.	Required
billingAddressId	InvoiceLine.billingAddressId	Billing address associated with this invoice line.	Required
referenceEntityItemId	InvoiceLine.referenceEntityId	Reference to a related object record for this invoice line.	Optional
taxTreatmentId	InvoiceLine.taxTreatmentId	Tax treatment applied to this invoice line such as taxable or nontaxable. If the <code>TaxTreatmentId</code> property isn't specified in the request, it's retrieved from the organization's default values . If the organization's defaults aren't set, an error is thrown.	Optional
legalEntityId	InvoiceLine.legalEntityId	Legal entity that this invoice line belongs to. If the <code>LegalEntityId</code> property isn't specified in the request, it's retrieved from the organization's default values . If the organization's defaults aren't set, an error is thrown.	Optional
legalEntityAccountingPeriodId	InvoiceLine.legalEntityAccountingPeriodId	Accounting period for the legal entity that this invoice line belongs to.	Optional
product2Id	InvoiceLine.product2Id	Identifier for the product that's billed in this invoice line.	Optional
usageProductId	InvoiceLine.usageProductId	Identifier for the usage-based product if this invoice line is for usage-based billing.	Optional
isUsageBasedInvoiceLine	InvoiceLine.isUsageBasedInvoiceLine	Boolean value that indicates whether this invoice line is for a usage-based product (<code>true</code>) or not (<code>false</code>).	Optional
usageOverageQuantity	InvoiceLine.usageOverageQuantity	Quantity of usage overage for this invoice line, if applicable.	Optional

NAME	Standard Object Field	Description	Required or Optional
unitOfMeasureId	InvoiceLine.unitOfMeasureId	Identifier for the unit of measure for the product or service, such as each, kg, or lb.	Optional
description	InvoiceLine.description	Description of the invoice line item with additional details.	Optional

Tax Record

Keep these considerations in mind when you specify a Tax record as the Graph attribute type.

- The supported Graph attribute method is POST only.
- The associated standard object is InvoiceLineTax.
- The invoiceLineTax graph record must not include the taxCalculationStatus property value as Pending.

JSON example

```
{
  "referenceId": "refInvoiceLineTax",
  "record": {
    "attributes": {
      "type": "InvoiceLineTax",
      "method": "POST"
    },
    "taxTransactionNumber": "TX123456789",
    "taxAmount": 15.00,
    "taxRate": 0.08,
    "taxName": "Sales Tax",
    "taxCode": "TX-SALES",
    "taxEffectiveDate": "2024-01-01",
    "invoiceLine": "@{refInvoiceLine.id}",
    "taxDocumentNumber": "TAXDOC987654",
    "taxExemptAmount": 0.00,
    "description": "Exempt from VAT"
  }
}
```

Table 3: Properties

NAME	Standard Object Field	Description	Required or Optional
taxTransactionNumber	InvoiceLineTax.taxTransactionNumber	Unique identifier of the tax transaction related to this invoice line tax.	Required
taxAmount	InvoiceLineTax.taxAmount	Total tax amount applied to the invoice line.	Required
taxRate	InvoiceLineTax.taxRate	Rate at which the tax is applied on the invoice line.	Required
taxName	InvoiceLineTax.taxName	Name of the tax applied on the invoice line, such as Sales Tax or Value Added Tax (VAT).	Required
taxCode	InvoiceLineTax.taxCode	Tax code that corresponds to the applied tax rate.	Required

NAME	Standard Object Field	Description	Required or Optional
taxEffectiveDate	InvoiceLineTax.taxEffectiveDate	Effective date from which the tax rate applies.	Required
invoiceLine	InvoiceLineTax.invoiceLine	Reference to the invoice line this tax record is associated with.	Required
taxDocumentNumber	InvoiceLineTax.taxDocumentNumber	Document number associated with the tax transaction, such as tax return document or government filing number.	Required
taxExemptAmount	InvoiceLine.billingAddressId	Billing address associated with this invoice line.	Required
description	InvoiceLineTax.description	Additional details about the tax.	Optional

Shipping Address Record

Keep these considerations in mind when you specify a Shipping Address record as the Graph attribute type.

- The supported Graph attribute method is POST only.
- The associated standard object is InvoiceAddressGroup.

JSON example

```
{
  "referenceId": "refShippingAddress",
  "record": {
    "attributes": {
      "type": "InvoiceAddressGroup",
      "method": "POST"
    },
    "street": "456 Elm St",
    "city": "Springfield",
    "postalCode": "62701",
    "state": "IL",
    "country": "USA",
    "longitude": "-89.6501",
    "latitude": "39.7817",
    "invoiceId": "@{refInvoice.id}"
  }
}
```

Table 4: Properties

NAME	Standard Object Field	Description	Required or Optional
invoiceId	InvoiceAddressGroup.invoice	Unique identifier of the invoice associated with this shipping address.	Required
street	InvoiceAddressGroup.street	Street address where the goods or services are shipped to.	Required
city	InvoiceAddressGroup.city	City where the shipment is delivered.	Required

NAME	Standard Object Field	Description	Required or Optional
postalCode	InvoiceAddressGroup.postalCode	Postal or ZIP code for the shipping address.	Required
state	InvoiceAddressGroup.state	State or province of the delivery location.	Required
country	InvoiceAddressGroup.country	Country where the shipment is delivered.	Required
longitude	InvoiceAddressGroup.longitude	Geographic longitude of the shipping address location for mapping purposes.	Optional
latitude	InvoiceAddressGroup.latitude	Geographic latitude of the shipping address location for mapping purposes.	Optional

Billing Address Record

Keep these considerations in mind when you specify a Billing Address record as the Graph attribute type.

- The supported Graph attribute method is POST only.
- The associated standard object is InvoiceAddressGroup.

JSON example

```
{
  "referenceId": "refBillingAddress",
  "record": {
    "attributes": {
      "type": "InvoiceAddressGroup",
      "method": "POST"
    },
    "street": "789 Oak St",
    "city": "Los Angeles",
    "postalCode": "90001",
    "state": "CA",
    "country": "USA",
    "longitude": "-118.2437",
    "latitude": "34.0522",
    "invoiceId": "@{refInvoice.id}"
  }
}
```

Table 5: Properties

NAME	Standard Object Field	Description	Required or Optional
invoiceId	InvoiceAddressGroup.invoice	Unique identifier of the invoice associated with this billing address.	Required
street	InvoiceAddressGroup.street	Street address for billing purposes.	Required
city	InvoiceAddressGroup.city	City for billing address.	Required
postalCode	InvoiceAddressGroup.postalCode	Postal or ZIP code for the billing address.	Required
state	InvoiceAddressGroup.state	State or province for the billing address.	Required

NAME	Standard Object Field	Description	Required or Optional
country	InvoiceAddressGroup.country	Country for the billing address.	Required
longitude	InvoiceAddressGroup.longitude	Geographic longitude of the billing address location for mapping purposes.	Optional
latitude	InvoiceAddressGroup.latitude	Geographic latitude of the billing address location for mapping purposes.	Optional

Invoice Draft To Posted Input

Input representation of the details of the draft invoice that's posted.

JSON example

```
{
  "invoiceIds": ["3ttxx0000004CIjAAM"]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
correlationId	String	Splunk correlation ID to track the messages that are related to the request and are logged in Splunk by the different services involved in the request. If the ID isn't specified, the service creates a random Universally Unique Identifier (UUID).	Optional	62.0
invoiceIds	String[]	IDs of the invoice records in <code>Draft</code> status to be posted. You can post one draft invoice per API request.	Required	62.0

Invoice Estimated Tax Calculation Input

Details of the invoice for which the estimated `tadsfsefx` must be calculated.

JSON example

```
{
  "invoiceIds": ["3ttxx0000004CIjAAM"]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
correlationId	String	Splunk correlation ID to track the messages that are related to the request and are logged in Splunk by the different services involved in the request. If the ID isn't specified, the service creates a random Universally Unique Identifier (UUID).	Optional	63.0
invoiceIds	String[]	IDs of the invoices for which the estimated tax must be calculated. You can specify one invoice per API request.	Required	63.0

Invoice Ingestion Input

Input representation of the details of the invoice to be processed. The details include the tax processing status, user preferences for tax callouts, and associated object graph representation.

JSON example

This example shows a sample request to ingest a draft invoice with a tax callout.

```
{
  "invoices": [
    {
      "shouldCalculateTax": true,
      "taxCalculationStatus": "Estimated",
      "graph": {
        "graphId": "CreateInvoice",
        "records": [
          {
            "referenceId": "refAccount",
            "record": {
              "attributes": {
                "type": "Account",
                "method": "GET",
                "id": "ExternalId__c/123"
              }
            }
          },
          {
            "referenceId": "refContact",
            "record": {
              "attributes": {
                "type": "Contact",
                "method": "GET",
                "id": "ExternalId__c/123"
              }
            }
          }
        ]
      }
    }
  ]
}
```

```

"referenceId": "refInvoice",
"record": {
  "Attributes": {
    "type": "Invoice",
    "method": "POST"
  },
  "billingAccountId": "001SG00000mKfFGYAW",
  "billToContactId": "003SG00000Bnv5HYAR",
  "paymentTermId": "20Xxx0000004CFUGA2",
  "referenceEntityId": "801xx000003GeQQAA0",
  "status": "Draft",
  "invoiceDate": "2024-12-19",
  "currencyIsoCode": "USD",
  "dueDate": "2024-12-19",
  "invoiceNumber": "DOC-10",
  "description": "Sample Invoice",
  "uniqueIdentifier": "5873af8f-f007-4aa0-9e3d-53a08c3f59de"
}
},
{
  "referenceId": "refBillingAddress",
  "record": {
    "Attributes": {
      "type": "InvoiceAddressGroup",
      "method": "POST"
    },
    "street": "123 Main St",
    "city": "NewYork",
    "postalCode": "10001",
    "state": "New York",
    "country": "US",
    "longitude": "123.456",
    "latitude": "78.910",
    "invoiceId": "3ttSG000000EPjJYAW"
  }
},
{
  "referenceId": "refShippingAddress",
  "record": {
    "attributes": {
      "type": "InvoiceAddressGroup",
      "method": "POST"
    },
    "street": "123 Main St",
    "city": "NewYork",
    "postalCode": "10001",
    "state": "New York",
    "country": "US",
    "longitude": "123.456",
    "latitude": "78.910",
    "invoiceId": "3ttSG000000EPjJYAW"
  }
},
{

```

```

"referenceId": "refInvoiceLine1",
"record": {
  "attributes": {
    "type": "InvoiceLine",
    "method": "POST"
  },
  "name": "productName1",
  "product2Id": "01txx0000006ic4AAA",
  "invoiceLineStartDate": "2024-11-10",
  "invoiceLineEndDate": "2024-11-13",
  "quantity": "10",
  "unitPrice": "10",
  "chargeAmount": "100",
  "invoiceId": "3ttSG000000EPjJYAW",
  "referenceEntityItemId": "802xx000001neB9AAI",
  "billingAddressId": "8zzSG0000000IbFYAU",
  "shippingAddressId": "8zzSG0000000IbGYAU",
  "taxTreatmentId": "1ttxx0000000BOTAA2",
  "legalEntityId": "0fwxx0000000001AAA",
  "legalEntityAccountingPeriodId": "1HLxx0000004C92GAE"
}
},
{
  "referenceId": "refInvoiceLine2",
  "record": {
    "attributes": {
      "type": "InvoiceLine",
      "method": "POST"
    },
    "name": "productName2",
    "product2Id": "01txx0000006ic4AAA",
    "invoiceLineStartDate": "2024-11-10",
    "invoiceLineEndDate": "2024-11-15",
    "quantity": "10",
    "unitPrice": "10",
    "chargeAmount": "100",
    "invoiceId": "3ttSG000000EPjJYAW",
    "referenceEntityItemId": "802xx000001neB9AAI",
    "billingAddressId": "8zzSG0000000IbFYAU",
    "shippingAddressId": "8zzSG0000000IbGYAU",
    "taxTreatmentId": "1ttxx00000001DpAAI",
    "legalEntityId": "0fwxx0000000001AAA",
    "legalEntityAccountingPeriodId": "1HLxx0000004C92GAE"
  }
},
{
  "referenceId": "refInvoiceLineTax",
  "record": {
    "attributes": {
      "type": "InvoiceLineTax",
      "method": "POST"
    },
    "taxAmount": 7.25,
    "taxCode": "CA-94121",

```

```

        "taxName": "CALIFORNIA",
        "taxRate": 0.25,
        "taxEffectiveDate": "2024-11-10",
        "taxDocumentNumber": "123",
        "taxExemptAmount": 0,
        "taxTransactionNumber": "k1",
        "description": "Associated tax line.",
        "invoiceLineId": "5TVSG0000004dAr4AI"
    }
},
{
    "referenceId": "refInvoiceLineTax1",
    "record": {
        "attributes": {
            "type": "InvoiceLineTax",
            "method": "POST"
        },
        "taxAmount": "10",
        "taxCode": "CA-94121",
        "taxName": "CALIFORNIA",
        "taxRate": 0.25,
        "taxEffectiveDate": "2024-11-10",
        "taxDocumentNumber": "123",
        "taxExemptAmount": 0,
        "taxTransactionNumber": "125",
        "invoiceLineId": "5TVSG0000004xeD4AQ",
        "description": "Associated tax line."
    }
}
]
}
}
]
}
}

```

This example shows a sample request ingest a draft invoice without a tax callout.

```

{
  "invoices": [
    {
      "taxCalculationStatus": "Estimated",
      "graph": {
        "graphId": "123",
        "records": [
          {
            "referenceId": "refAccount",
            "record": {
              "attributes": {
                "type": "Account",
                "method": "GET",
                "id": "TestExternalId__c/123"
              }
            }
          },
          {

```

```
"referenceId": "refInvoice",
"record": {
  "Attributes": {
    "type": "Invoice",
    "method": "POST"
  },
  "billingAccountId": "@{refAccount.Id}",
  "billToContactId": "003xx000004Wk8qAAC",
  "paymentTermId": "20Xxx0000004CFUGA2",
  "referenceEntityId": "801xx000003GeQQAA0",
  "status": "Draft",
  "invoiceDate": "2024-12-19",
  "currencyIsoCode": "USD",
  "dueDate": "2024-12-19",
  "invoiceNumber": "DOC-10",
  "description": "testInvoice",
  "uniqueIdentifier": "c76011a1-e113-49d9-9c54-3b5c68950ada"
}
},
{
  "referenceId": "refBillingAddress",
  "record": {
    "Attributes": {
      "type": "InvoiceAddressGroup",
      "method": "POST"
    },
    "street": "123 Main St",
    "city": "NewYork",
    "postalCode": "10001",
    "state": "New York",
    "country": "US",
    "longitude": "123.456",
    "latitude": "78.910",
    "invoiceId": "@{refInvoice.id}"
  }
},
{
  "referenceId": "refShippingAddress",
  "record": {
    "attributes": {
      "type": "InvoiceAddressGroup",
      "method": "POST"
    },
    "street": "123 Main St",
    "city": "NewYork",
    "postalCode": "10001",
    "state": "New York",
    "country": "US",
    "longitude": "123.456",
    "latitude": "78.910",
    "invoiceId": "@{refInvoice.id}"
  }
},
{
```



```

"referenceId": "refInvoiceLine1",
"record": {
  "attributes": {
    "type": "InvoiceLine",
    "method": "POST"
  },
  "name": "productName1",
  "product2Id": "01txx0000006ic4AAA",
  "invoiceLineStartDate": "2024-11-10",
  "invoiceLineEndDate": "2024-11-13",
  "quantity": "10",
  "unitPrice": "10",
  "chargeAmount": "100",
  "invoiceId": "@{refInvoice.id}",
  "referenceEntityItemId": "802xx000001neB9AAI",
  "billingAddressId": "@{refBillingAddress.id}",
  "shippingAddressId": "@{refShippingAddress.id}",
  "taxTreatmentId": "1ttxx000000BOTAA2",
  "legalEntityId": "0fwxx000000001AAA",
  "legalEntityAccountingPeriodId": "1HLxx0000004C92GAE"
}
},
{
"referenceId": "refInvoiceLine2",
"record": {
  "attributes": {
    "type": "InvoiceLine",
    "method": "POST"
  },
  "name": "productName2",
  "product2Id": "01txx0000006ic4AAA",
  "invoiceLineStartDate": "2024-11-10",
  "invoiceLineEndDate": "2024-11-15",
  "quantity": "10",
  "unitPrice": "10",
  "chargeAmount": "100",
  "invoiceId": "@{refInvoice.id}",
  "referenceEntityItemId": "802xx000001neB9AAI",
  "billingAddressId": "@{refBillingAddress.id}",
  "shippingAddressId": "@{refShippingAddress.id}",
  "taxTreatmentId": "1ttxx0000001DpAAI",
  "legalEntityId": "0fwxx000000001AAA",
  "legalEntityAccountingPeriodId": "1HLxx0000004C92GAE"
}
},
{
"referenceId": "refInvoiceLineTax",
"record": {
  "attributes": {
    "type": "InvoiceLineTax",
    "method": "POST"
  },
  "taxAmount": 7.25,
  "taxCode": "CA-94121",

```

```

        "taxName": "CALIFORNIA",
        "taxRate": 0.25,
        "taxEffectiveDate": "2024-11-10",
        "taxDocumentNumber": "123",
        "taxExemptAmount": 0,
        "taxTransactionNumber": "k1",
        "description": "description for tax Line",
        "invoiceLineId": "@{refInvoiceLine1.id}"
    }
},
{
    "referenceId": "refInvoiceLineTax1",
    "record": {
        "attributes": {
            "type": "InvoiceLineTax",
            "method": "POST"
        },
        "taxAmount": "10",
        "taxCode": "CA-94121",
        "taxName": "CALIFORNIA",
        "taxRate": 0.25,
        "taxEffectiveDate": "2024-11-10",
        "taxDocumentNumber": "123",
        "taxExemptAmount": 0,
        "taxTransactionNumber": "125",
        "invoiceLineId": "@{refInvoiceLine2.id}",
        "description": "description for tax Line"
    }
}
]
}
}
]
}

```

This example shows a sample request to ingest posted invoices.

```

{
  "invoices": [
    {
      "taxCalculationStatus": "Posted",
      "graph": {
        "graphId": "123",
        "records": [
          {
            "referenceId": "refAccount",
            "record": {
              "attributes": {
                "type": "Account",
                "method": "GET",
                "id": "ExternalId__c/123"
              }
            }
          },
          {

```

```

"referenceId": "refInvoice",
"record": {
  "Attributes": {
    "type": "Invoice",
    "method": "POST"
  },
  "billingAccountId": "001SG00000njpF3YAI",
  "billToContactId": "003xx000004Wk8qAAC",
  "paymentTermId": "20Xxx0000004CFUGA2",
  "referenceEntityId": "801xx000003GeQQAA0",
  "status": "Posted",
  "invoiceDate": "2024-12-19",
  "currencyIsoCode": "USD",
  "dueDate": "2024-12-19",
  "invoiceNumber": "DOC-10",
  "description": "Sample Invoice",
  "uniqueIdentifier": "9994b2c4-c0c3-47c3-806f-ae6e1f16bac3"
}
},
{
  "referenceId": "refBillingAddress",
  "record": {
    "Attributes": {
      "type": "InvoiceAddressGroup",
      "method": "POST"
    },
    "street": "123 Main St",
    "city": "NewYork",
    "postalCode": "10001",
    "state": "New York",
    "country": "US",
    "longitude": "123.456",
    "latitude": "78.910",
    "invoiceId": "3ttSG000000FFWbYAO"
  }
},
{
  "referenceId": "refShippingAddress",
  "record": {
    "attributes": {
      "type": "InvoiceAddressGroup",
      "method": "POST"
    },
    "street": "123 Main St",
    "city": "NewYork",
    "postalCode": "10001",
    "state": "New York",
    "country": "US",
    "longitude": "123.456",
    "latitude": "78.910",
    "invoiceId": "3ttSG000000FFWbYAO"
  }
},
{

```

```

"referenceId": "refInvoiceLine1",
"record": {
  "attributes": {
    "type": "InvoiceLine",
    "method": "POST"
  },
  "name": "productName1",
  "product2Id": "01txx0000006ic4AAA",
  "invoiceLineStartDate": "2024-11-10",
  "invoiceLineEndDate": "2024-11-13",
  "quantity": "10",
  "unitPrice": "10",
  "chargeAmount": "100",
  "invoiceId": "3ttSG000000FFWbYAO",
  "referenceEntityItemId": "802xx000001neB9AAI",
  "billingAddressId": "8zzSG0000000NmDYAU",
  "shippingAddressId": "8zzSG0000000IbGYAU",
  "taxTreatmentId": "1ttxx0000000BOTAA2",
  "legalEntityId": "0fwxx0000000001AAA",
  "legalEntityAccountingPeriodId": "1HLxx0000004C92GAE"
}
},
{
  "referenceId": "refInvoiceLine2",
  "record": {
    "attributes": {
      "type": "InvoiceLine",
      "method": "POST"
    },
    "name": "productName2",
    "product2Id": "01txx0000006ic4AAA",
    "invoiceLineStartDate": "2024-11-10",
    "invoiceLineEndDate": "2024-11-15",
    "quantity": "10",
    "unitPrice": "10",
    "chargeAmount": "100",
    "invoiceId": "3ttSG000000FFWbYAO",
    "referenceEntityItemId": "802xx000001neB9AAI",
    "billingAddressId": "8zzSG0000000NmDYAU",
    "shippingAddressId": "8zzSG0000000IbGYAU",
    "taxTreatmentId": "1ttxx00000001DpAAI",
    "legalEntityId": "0fwxx0000000001AAA",
    "legalEntityAccountingPeriodId": "1HLxx0000004C92GAE"
  }
},
{
  "referenceId": "refInvoiceLineTax1",
  "record": {
    "attributes": {
      "type": "InvoiceLineTax",
      "method": "POST"
    },
    "taxAmount": "10",
    "taxCode": "CA-94121",

```


Invoice Input for Ingestion

Input representation of the details of the invoice that must be generated for or ingested into Billing.

JSON example

This example shows a sample request to ingest a draft invoice with a tax callout.

```
{
  "invoices": [
    {
      "shouldCalculateTax": true,
      "taxCalculationStatus": "Estimated",
      "graph": {
        "graphId": "CreateInvoice",
        "records": [
          {
            "referenceId": "refAccount",
            "record": {
              "attributes": {
                "type": "Account",
                "method": "GET",
                "id": "ExternalId__c/123"
              }
            }
          },
          {
            "referenceId": "refContact",
            "record": {
              "attributes": {
                "type": "Contact",
                "method": "GET",
                "id": "ExternalId__c/123"
              }
            }
          },
          {
            "referenceId": "refInvoice",
            "record": {
              "Attributes": {
                "type": "Invoice",
                "method": "POST"
              },
              "billingAccountId": "001SG00000mKFfGYAW",
              "billToContactId": "003SG00000Bnv5HYAR",
              "paymentTermId": "20Xxx0000004CFUGA2",
              "referenceEntityId": "801xx000003GeQQAA0",
              "status": "Draft",
              "invoiceDate": "2024-12-19",
              "currencyIsoCode": "USD",
              "dueDate": "2024-12-19",
              "invoiceNumber": "DOC-10",
              "description": "Sample Invoice",
              "uniqueIdentifier": "5873af8f-f007-4aa0-9e3d-53a08c3f59de"
            }
          }
        ]
      }
    }
  ],
}
```

```

{
  "referenceId": "refBillingAddress",
  "record": {
    "Attributes": {
      "type": "InvoiceAddressGroup",
      "method": "POST"
    },
    "street": "123 Main St",
    "city": "NewYork",
    "postalCode": "10001",
    "state": "New York",
    "country": "US",
    "longitude": "123.456",
    "latitude": "78.910",
    "invoiceId": "3ttSG000000EPjJYAW"
  }
},
{
  "referenceId": "refShippingAddress",
  "record": {
    "attributes": {
      "type": "InvoiceAddressGroup",
      "method": "POST"
    },
    "street": "123 Main St",
    "city": "NewYork",
    "postalCode": "10001",
    "state": "New York",
    "country": "US",
    "longitude": "123.456",
    "latitude": "78.910",
    "invoiceId": "3ttSG000000EPjJYAW"
  }
},
{
  "referenceId": "refInvoiceLine1",
  "record": {
    "attributes": {
      "type": "InvoiceLine",
      "method": "POST"
    },
    "name": "productName1",
    "product2Id": "01txx0000006ic4AAA",
    "invoiceLineStartDate": "2024-11-10",
    "invoiceLineEndDate": "2024-11-13",
    "quantity": "10",
    "unitPrice": "10",
    "chargeAmount": "100",
    "invoiceId": "3ttSG000000EPjJYAW",
    "referenceEntityItemId": "802xx000001neB9AAI",
    "billingAddressId": "8zzSG0000000IbFYAU",
    "shippingAddressId": "8zzSG0000000IbGYAU",
    "taxTreatmentId": "1ttxx0000000BOTAA2",
    "legalEntityId": "0fwxx0000000001AAA",
  }
}

```

```

        "legalEntityAccountingPeriodId": "1HLxx0000004C92GAE"
    }
},
{
    "referenceId": "refInvoiceLine2",
    "record": {
        "attributes": {
            "type": "InvoiceLine",
            "method": "POST"
        },
        "name": "productName2",
        "product2Id": "01txx0000006ic4AAA",
        "invoiceLineStartDate": "2024-11-10",
        "invoiceLineEndDate": "2024-11-15",
        "quantity": "10",
        "unitPrice": "10",
        "chargeAmount": "100",
        "invoiceId": "3ttSG000000EPjJYAW",
        "referenceEntityItemId": "802xx0000001neB9AAI",
        "billingAddressId": "8zzSG0000000IbFYAU",
        "shippingAddressId": "8zzSG0000000IbGYAU",
        "taxTreatmentId": "1ttxx00000001DpAAI",
        "legalEntityId": "0fwxx0000000001AAA",
        "legalEntityAccountingPeriodId": "1HLxx0000004C92GAE"
    }
},
{
    "referenceId": "refInvoiceLineTax",
    "record": {
        "attributes": {
            "type": "InvoiceLineTax",
            "method": "POST"
        },
        "taxAmount": 7.25,
        "taxCode": "CA-94121",
        "taxName": "CALIFORNIA",
        "taxRate": 0.25,
        "taxEffectiveDate": "2024-11-10",
        "taxDocumentNumber": "123",
        "taxExemptAmount": 0,
        "taxTransactionNumber": "kl",
        "description": "Associated tax line.",
        "invoiceLineId": "5TVSG0000004dAr4AI"
    }
},
{
    "referenceId": "refInvoiceLineTax1",
    "record": {
        "attributes": {
            "type": "InvoiceLineTax",
            "method": "POST"
        },
        "taxAmount": "10",
        "taxCode": "CA-94121",

```



```

        "taxName": "CALIFORNIA",
        "taxRate": 0.25,
        "taxEffectiveDate": "2024-11-10",
        "taxDocumentNumber": "123",
        "taxExemptAmount": 0,
        "taxTransactionNumber": "125",
        "invoiceLineId": "5TVSG0000004xeD4AQ",
        "description": "Associated tax line."
    }
  }
]
}
}
]
}

```

This example shows a sample request ingest a draft invoice without a tax callout.

```

{
  "invoices": [
    {
      "taxCalculationStatus": "Estimated",
      "graph": {
        "graphId": "123",
        "records": [
          {
            "referenceId": "refAccount",
            "record": {
              "attributes": {
                "type": "Account",
                "method": "GET",
                "id": "TestExternalId__c/123"
              }
            }
          },
          {
            "referenceId": "refInvoice",
            "record": {
              "Attributes": {
                "type": "Invoice",
                "method": "POST"
              },
              "billingAccountId": "@{refAccount.Id}",
              "billToContactId": "003xx000004Wk8qAAC",
              "paymentTermId": "20Xxx0000004CFUGA2",
              "referenceEntityId": "801xx000003GeQQAA0",
              "status": "Draft",
              "invoiceDate": "2024-12-19",
              "currencyIsoCode": "USD",
              "dueDate": "2024-12-19",
              "invoiceNumber": "DOC-10",
              "description": "testInvoice",
              "uniqueIdentifier": "c76011a1-e113-49d9-9c54-3b5c68950ada"
            }
          }
        ]
      }
    }
  ],
}

```

```

{
  "referenceId": "refBillingAddress",
  "record": {
    "Attributes": {
      "type": "InvoiceAddressGroup",
      "method": "POST"
    },
    "street": "123 Main St",
    "city": "NewYork",
    "postalCode": "10001",
    "state": "New York",
    "country": "US",
    "longitude": "123.456",
    "latitude": "78.910",
    "invoiceId": "@{refInvoice.id}"
  }
},
{
  "referenceId": "refShippingAddress",
  "record": {
    "attributes": {
      "type": "InvoiceAddressGroup",
      "method": "POST"
    },
    "street": "123 Main St",
    "city": "NewYork",
    "postalCode": "10001",
    "state": "New York",
    "country": "US",
    "longitude": "123.456",
    "latitude": "78.910",
    "invoiceId": "@{refInvoice.id}"
  }
},
{
  "referenceId": "refInvoiceLine1",
  "record": {
    "attributes": {
      "type": "InvoiceLine",
      "method": "POST"
    },
    "name": "productName1",
    "product2Id": "01txx0000006ic4AAA",
    "invoiceLineStartDate": "2024-11-10",
    "invoiceLineEndDate": "2024-11-13",
    "quantity": "10",
    "unitPrice": "10",
    "chargeAmount": "100",
    "invoiceId": "@{refInvoice.id}",
    "referenceEntityItemId": "802xx000001neB9AAI",
    "billingAddressId": "@{refBillingAddress.id}",
    "shippingAddressId": "@{refShippingAddress.id}",
    "taxTreatmentId": "1ttxx0000000BOTAA2",
    "legalEntityId": "0fwxx0000000001AAA",
  }
}

```

```

        "legalEntityAccountingPeriodId": "1HLxx0000004C92GAE"
    }
},
{
    "referenceId": "refInvoiceLine2",
    "record": {
        "attributes": {
            "type": "InvoiceLine",
            "method": "POST"
        },
        "name": "productName2",
        "product2Id": "01txx0000006ic4AAA",
        "invoiceLineStartDate": "2024-11-10",
        "invoiceLineEndDate": "2024-11-15",
        "quantity": "10",
        "unitPrice": "10",
        "chargeAmount": "100",
        "invoiceId": "@{refInvoice.id}",
        "referenceEntityItemId": "802xx000001neB9AAI",
        "billingAddressId": "@{refBillingAddress.id}",
        "shippingAddressId": "@{refShippingAddress.id}",
        "taxTreatmentId": "1ttxx00000001DpAAI",
        "legalEntityId": "0fwxx0000000001AAA",
        "legalEntityAccountingPeriodId": "1HLxx0000004C92GAE"
    }
},
{
    "referenceId": "refInvoiceLineTax",
    "record": {
        "attributes": {
            "type": "InvoiceLineTax",
            "method": "POST"
        },
        "taxAmount": 7.25,
        "taxCode": "CA-94121",
        "taxName": "CALIFORNIA",
        "taxRate": 0.25,
        "taxEffectiveDate": "2024-11-10",
        "taxDocumentNumber": "123",
        "taxExemptAmount": 0,
        "taxTransactionNumber": "kl",
        "description": "description for tax Line",
        "invoiceLineId": "@{refInvoiceLine1.id}"
    }
},
{
    "referenceId": "refInvoiceLineTax1",
    "record": {
        "attributes": {
            "type": "InvoiceLineTax",
            "method": "POST"
        },
        "taxAmount": "10",
        "taxCode": "CA-94121",

```

```

        "taxName": "CALIFORNIA",
        "taxRate": 0.25,
        "taxEffectiveDate": "2024-11-10",
        "taxDocumentNumber": "123",
        "taxExemptAmount": 0,
        "taxTransactionNumber": "125",
        "invoiceLineId": "@{refInvoiceLine2.id}",
        "description": "description for tax Line"
    }
  }
]
}
]
}

```

This example shows a sample request to ingest posted invoices.

```

{
  "invoices": [
    {
      "taxCalculationStatus": "Posted",
      "graph": {
        "graphId": "123",
        "records": [
          {
            "referenceId": "refAccount",
            "record": {
              "attributes": {
                "type": "Account",
                "method": "GET",
                "id": "ExternalId__c/123"
              }
            }
          },
          {
            "referenceId": "refInvoice",
            "record": {
              "Attributes": {
                "type": "Invoice",
                "method": "POST"
              },
              "billingAccountId": "001SG00000njpF3YAI",
              "billToContactId": "003xx000004Wk8qAAC",
              "paymentTermId": "20Xxx0000004CFUGA2",
              "referenceEntityId": "801xx000003GeQQAA0",
              "status": "Posted",
              "invoiceDate": "2024-12-19",
              "currencyIsoCode": "USD",
              "dueDate": "2024-12-19",
              "invoiceNumber": "DOC-10",
              "description": "Sample Invoice",
              "uniqueIdentifier": "9994b2c4-c0c3-47c3-806f-ae6e1f16bac3"
            }
          }
        ]
      }
    },
    {
      "referenceId": "refInvoice",
      "record": {
        "Attributes": {
          "type": "Invoice",
          "method": "POST"
        },
        "billingAccountId": "001SG00000njpF3YAI",
        "billToContactId": "003xx000004Wk8qAAC",
        "paymentTermId": "20Xxx0000004CFUGA2",
        "referenceEntityId": "801xx000003GeQQAA0",
        "status": "Posted",
        "invoiceDate": "2024-12-19",
        "currencyIsoCode": "USD",
        "dueDate": "2024-12-19",
        "invoiceNumber": "DOC-10",
        "description": "Sample Invoice",
        "uniqueIdentifier": "9994b2c4-c0c3-47c3-806f-ae6e1f16bac3"
      }
    }
  ],
}

```

```

{
  "referenceId": "refBillingAddress",
  "record": {
    "Attributes": {
      "type": "InvoiceAddressGroup",
      "method": "POST"
    },
    "street": "123 Main St",
    "city": "NewYork",
    "postalCode": "10001",
    "state": "New York",
    "country": "US",
    "longitude": "123.456",
    "latitude": "78.910",
    "invoiceId": "3ttSG000000FFWbYAO"
  }
},
{
  "referenceId": "refShippingAddress",
  "record": {
    "attributes": {
      "type": "InvoiceAddressGroup",
      "method": "POST"
    },
    "street": "123 Main St",
    "city": "NewYork",
    "postalCode": "10001",
    "state": "New York",
    "country": "US",
    "longitude": "123.456",
    "latitude": "78.910",
    "invoiceId": "3ttSG000000FFWbYAO"
  }
},
{
  "referenceId": "refInvoiceLine1",
  "record": {
    "attributes": {
      "type": "InvoiceLine",
      "method": "POST"
    },
    "name": "productName1",
    "product2Id": "01txx0000006ic4AAA",
    "invoiceLineStartDate": "2024-11-10",
    "invoiceLineEndDate": "2024-11-13",
    "quantity": "10",
    "unitPrice": "10",
    "chargeAmount": "100",
    "invoiceId": "3ttSG000000FFWbYAO",
    "referenceEntityItemId": "802xx000001neB9AAI",
    "billingAddressId": "8zzSG0000000NmDYAU",
    "shippingAddressId": "8zzSG0000000IbGYAU",
    "taxTreatmentId": "1ttxx0000000BOTAA2",
    "legalEntityId": "0fwxx0000000001AAA",
  }
}

```


Properties

Name	Type	Description	Required or Optional	Available Version
invoices	Invoice Ingestion Input[]	List of invoices to be generated or ingested, enabling the submission and processing of multiple invoices in a single request. This API supports one invoice per request. To send 25 requests at a time, see the Composite Batch request .	Required	63.0

Invoice Input

Input representation of the details of the billing schedule.

JSON example

```
{
  "accountId": "001SG00000mYtRWYA0",
  "action": "Posted",
  "billingScheduleIds": [
    "44bSG000000CvEMYAW"
  ],
  "billingTransactionId": "801SG00000mYtaXYAS",
  "correlationId": null,
  "invoiceDate": "2024-01-12",
  "targetDate": "2024-01-12"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
accountId	String	ID of the account record to create the invoices for.	Required if the <code>billingScheduleIds</code> or <code>billingTransactionId</code> property isn't specified.	63.0
action	String	Type of invoice to be created. Valid values are: <ul style="list-style-type: none"> • Draft • Posted 	Required	62.0
billingScheduleIds	String[]	List of billing schedule IDs that's used to create the invoices. You can specify a maximum of 200 billing schedules.	Required if the <code>accountId</code> or <code>billing</code>	62.0

Name	Type	Description	Required or Optional	Available Version
			TransactionId property isn't specified.	
billing TransactionId	String	ID of the billing transaction record, which is the order ID, to create the invoices for.	Required if the accountId or billing ScheduleIds property isn't specified.	63.0
correlationId	String	Property that's tagged against the published InvoiceProcessedEvent event, if specified.	Optional	62.0
invoiceDate	String	Stamping date of the invoice in ISO 8601 format.	Required	62.0
targetDate	String	Date in ISO 8601 format used to decide the billing periods that are included to create invoices.	Required	62.0

Invoice Preview Input

Input representation of the details of the billing transaction that the preview invoices are generated for.

JSON example

```
{
  "billingTransactionId": "801Z600000004LoIAI",
  "numberOfBillingPeriods": 2,
  "previewDate": "2024-12-04"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
billing TransactionId	String	ID of the record to generate the preview invoices for.	Required	63.0
numberOf BillingPeriods	Integer	Number of billing periods that the invoice preview is generated for. If unspecified, the default value is 2.	Optional	64.0

Name	Type	Description	Required or Optional	Available Version
previewDate	String	The date on which the preview invoice is generated. For the first invoice, the preview date is the target date for generating the invoice. For the second invoice, the target date is calculated based on the preview date and the minimum billing frequency of the transactions. The default value is the current date.	Optional	63.0

Line Item Input

Input representation of the details of the line item for tax calculation.

JSON example

```
{
  "lineItems": [
    {
      "quantity": 1,
      "amount": 100,
      "taxCode": "TX0001",
      "productCode": "Y0001",
      "productSKU": "PRES-RX-12896745",
      "description": "New Product",
      "effectiveDate": "2022-03-09T10:30:41.000Z",
      "lineNumber": "5TVxx0000004C92GAE",
      "addresses": {
        "shipFrom": {
          "street": "123 Alaskan Way",
          "city": "Seattle",
          "state": "WA",
          "country": "US",
          "postalCode": "98101",
          "latitude": 45.12,
          "longitude": 45.12
        },
        "shipTo": {
          "street": "123 Auburn Blvd",
          "city": "Sacramento",
          "state": "CA",
          "country": "US",
          "postalCode": "95841",
          "latitude": 45.12,
          "longitude": 45.12
        },
        "soldTo": {
          "street": "123 Auburn Blvd",
          "city": "Sacramento",
          "state": "CA",

```

```

    "country": "US",
    "postalCode": "95841",
    "latitude": 45.12,
    "longitude": 45.12
  },
  "billTo": {
    "street": "123 Auburn Blvd",
    "city": "Sacramento",
    "state": "CA",
    "country": "US",
    "postalCode": "95841",
    "latitude": 45.12,
    "longitude": 45.12
  }
}
]
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
addresses	Addresses Input	Address types that specify different locations associated with the transaction of the line item.	Optional	62.0
amount	Double	Total amount for the line item.	Required	62.0
description	String	Description of the line item.	Optional	62.0
effectiveDate	String	Date that tax rules are applicable from. This property value overrides the global effective date.	Optional	62.0
legalEntity	String	Legal entity that's related to the tax treatment.	Optional	63.0
lineNumber	String	Unique identifier for the line item.	Required	62.0
productCode	String	Product code of the line item according to the tax treatment rules of the tax engine.	Optional	62.0
productId	String	ID of the product.	Optional	63.0
productSKU	String	Unique identifier of a product that can be used to identify products that are exempted from tax.	Optional	64.0
quantity	Double	Quantity of the line item.	Required	62.0
taxCode	String	Tax code of the line item according to the tax treatment rules of the tax engine.	Optional	62.0
unitPrice	Double	Unit price of the product.	Optional	63.0

Payment Line Apply Input

Input representation of the payment line details. This representation covers details on allocation of a payment to a specific invoice line. It also provides additional context through optional fields such as associated account and effective date.

JSON example

```
{
  "appliedToId": "3ttR000000001IkIAI",
  "amount": 10,
  "effectiveDate": "2020-08-11T07:53:15.000Z",
  "comments": "Apply payment",
  "associatedAccountId": "001R00000060AyuIAE"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
amount	Double	Amount that's applied. The amount must be less than the invoice line and payment balance.	Required	64.0
appliedToId	String	ID of the invoice line that this payment is applied to. Specify the IDs for these records. <ul style="list-style-type: none"> • Invoice • Invoice Line 	Required	64.0
associatedAccountId	String	ID of the associated account.	Optional	64.0
comments	String	Comments that you can add to the payment line application.	Optional	64.0
effectiveDate	String	Date from which the payment line application takes effect.	Optional	64.0

Payment Line Unapply Input

Input representation of the payment line details. This representation covers fields that you can specify to revert a payment line application to their preapplication state.

JSON example

```
{
  "effectiveDate": "2025-05-22T11:30:25.000Z",
  "comments": "Unapply payment"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
comments	String	Comments that you can add when you revert a payment line application.	Optional	64.0
effectiveDate	String	Date from when the reversal of the payment line application is in effect.	Optional	64.0

Payment Run Batch Filter Criteria Input

Input representation of the filter criteria for an invoice batch run. This representation covers the criteria and sequence for filtering payment run details. It specifies the field and object names, comparison operations, and values to be used for filtering.

JSON example

```
"filterCriteria": [
  {
    "objectName": "PaymentScheduleItem",
    "fieldName": "PaymentRunMatchingValue",
    "operation": "Equals",
    "value": "1",
    "criteriaSequence": 1
  },
  {
    "objectName": "PaymentScheduleItem",
    "fieldName": "PaymentRunMatchingValue",
    "operation": "Equals",
    "value": "2",
    "criteriaSequence": 2
  },
  {
    "objectName": "PaymentScheduleItem",
    "fieldName": "PaymentRunMatchingValue",
    "operation": "Equals",
    "value": "3",
    "criteriaSequence": 3
  }
]
```

Properties

Name	Type	Description	Required or Optional	Available Version
criteriaSequence	Integer	Sequence that's used to filter the payment run details.	Required	64.0

Name	Type	Description	Required or Optional	Available Version
fieldName	String	Name of the field that this filter is applicable for. Valid value is <code>PaymentRunMatchingValue</code> .	Required	64.0
objectName	Object	Name of the object that the filter is applicable for. Valid value is <code>PaymentScheduleItem</code> .	Required	64.0
operation	String	Operation that's used for comparison. Valid values are: <ul style="list-style-type: none"> • <code>Equals</code> • <code>InList</code> • <code>NotEquals</code> 	Required	64.0
value	String	Value that's used for the filter criteria.	Required	64.0

Payment Batch Scheduler Input

Input representation of the details of the request to create a payment scheduler. This representation sets the rules and timing for a payment scheduler, including match types, dates, frequency, and filter criteria.

JSON example

JSON example

```
{
  "schedulerName": "Payment Scheduler",
  "startDate": "2022-01-01",
  "endDate": "2022-12-31",
  "preferredTime": "02:05:00.000",
  "frequencyCadence": "Monthly",
  "recursEveryMonthOnDay": "28",
  "criteriaMatchType": "MatchAny",
  "status": "Active",
  "filterCriteria": [
    {
      "objectName": "PaymentScheduleItem",
      "fieldName": "PaymentRunMatchingValue",
      "operation": "Equals",
      "value": "1",
      "criteriaSequence": 1
    },
    {
      "objectName": "PaymentScheduleItem",
      "fieldName": "PaymentRunMatchingValue",
      "operation": "Equals",
      "value": "2",
      "criteriaSequence": 2
    }
  ]
}
```

```

{
  "objectName": "PaymentScheduleItem",
  "fieldName": "PaymentRunMatchingValue",
  "operation": "Equals",
  "value": "3",
  "criteriaSequence": 3
}
]
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
criteria MatchType	String	Match type for the criteria of the payment scheduler. Valid values are: <ul style="list-style-type: none"> Match Any Match None 	Required if the <code>frequencyCadence</code> property is set to <code>Monthly</code> .	64.0
endDate	String	End date of the payment scheduler.	Required if the <code>frequencyCadence</code> property is set to <code>Monthly</code> .	64.0
frequency Cadence	String	Frequency cadence of the payment scheduler. Valid values are: <ul style="list-style-type: none"> Once Daily Weekly Monthly 	Required	64.0
filter Criteria	Payment Run Batch Filter Criteria Input	List of criteria that are used to filter the payment run details.	Required if the <code>frequencyCadence</code> property is set to <code>Monthly</code> .	64.0
preferredTime	String	Preferred time for the payment scheduler run.	Required	64.0
recurseEvery MonthOnDay	String	Date when the payment scheduler recurs.	Required if the <code>frequencyCadence</code> property is set to <code>Monthly</code> .	64.0
schedulerName	String	Name of the payment scheduler.	Required	64.0
startDate	String	Start date of the payment scheduler.	Required	64.0

Name	Type	Description	Required or Optional	Available Version
status	String	Status of the payment scheduler. Valid values are: <ul style="list-style-type: none"> • Active • Canceled • Draft • Inactive 	Required	64.0

Payment Scheduler Update Input

Input representation of the details of the request to update the status of a payment scheduler. This representation defines the status of a payment scheduler, which can be set to Active, Canceled, Draft, or Inactive.

JSON example

JSON example

```
{
  "status": "Active"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
status	String	Status that must be set to activate or deactivate a payment scheduler. Valid values are: <ul style="list-style-type: none"> • Active • Canceled • Draft • Inactive 	Required	64.0

Posted Invoice List Write-Off Input

Input representation of the request to write off a list of posted invoices. This representation includes the details of invoices that you want to write off.

JSON example

```
{
  "invoices": [
    {
      "invoiceId": "3ttxx00000000cjAAA",
      "reasonCode": "Bad Debt",
      "description": "Bad Debt"
    }
  ]
}
```

```

    },
    {
      "invoiceId": "3ttxx00000000cjAAA",
      "reasonCode": "Concession",
      "description": "Concession"
    }
  ]
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
invoices	Posted Invoice Write-Off Input	Details of the invoices that you want to write off.	Required	64.0

Posted Invoice Write-Off Input

Input representation of the details of the request to write off a posted invoice. This representation includes invoice details such as invoice ID and reason for writing off invoices.

JSON example

```

{
  "invoices": [
    {
      "invoiceId": "3ttxx00000000cjAAA",
      "reasonCode": "Bad Debt",
      "description": "Bad Debt"
    },
    {
      "invoiceId": "3ttxx00000000cjAAA",
      "reasonCode": "Concession",
      "description": "Concession"
    }
  ]
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
invoiceId	String	ID of the invoice record that you want to write off.	Required	64.0
reason	String	Reason for writing off invoices.	Optional	64.0
reasonCode	String	Code that categorizes the write-off reason. For example, if the reason for the invoice write-off is a disputed amount, the reason code can be Disputed Amount (DA).	Required	64.0

Refund Line Apply Input

Input representation of the details of a transaction refund request. This representation outlines the properties of a refund, including the refund amount and ID of the payment or credit memo record that the refund is applied to.

JSON example

```
{
  "appliedToId": "0aQR00000004ZkKMAU",
  "amount": 10,
  "effectiveDate": "2020-08-11T07:53:15.000Z",
  "comments": "Payment application."
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
amount	Double	Amount to refund.	Required	64.0
appliedToId	String	ID of a payment or credit memo record. The refund is applied to this object.	Required	64.0
comments	String	Additional details of the refund request.	Optional	64.0
effectiveDate	String	Date from when the refund is in effect.	Optional	64.0

Resume Billing Input

Input representation of the details of the request to resume the billing operation for an account or a billing schedule group.

JSON example

```
{
  "referenceIds":
  [
    {
      "referenceId": "001DU000001o2UwYAI",
      "resumeDate": "2024-11-27"
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
referenceIds	Resume Billing Object Input[]	Input representation of the account or billing schedule group IDs to resume the billing operation for.	Required	63.0

Resume Billing Object Input

Input representation of the details such as the ID of the account or billing schedule group along with the effective date. These details are used to start the billing operation.

JSON example

```
{
  "referenceIds":
  [
    {
      "referenceId": "001DU000001o2UwYAI",
      "resumeDate": "2024-11-27"
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
referenceId	String	ID of the account or billing schedule group to resume the billing operation for.	Required	63.0
resumeDate	String	Date when the billing operation is resumed. If a date isn't specified, the default value is today's date. The billing operation starts immediately and any future suspension dates aren't applicable.	Required	63.0

Selection Condition Input

Input representation of the criteria that's used to determine which sequencing policy is applied to a record. The criteria stores the conditions based on any standard or custom fields of the record.

JSON example

```
{
  "selectionCondition": [
    {
      "filterField": "AppType",
      "operator": "Equals",
      "filterValue": "RLM",
      "conditionNumber": 1
    },
    {
      "filterField": "Status",
      "operator": "Equals",
      "filterValue": "Posted",
      "conditionNumber": 2
    },
    {
      "filterField": "LegalEntity",
```

```

    "operator": "Equals",
    "filterValue": "US",
    "conditionNumber": 3
  }
]
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
condition Number	Integer	Unique number that's assigned to a condition in a sequence policy.	Required	65.0
filterField	String	Field used in the filter condition.	Required	65.0
filterValue	String	Value in the filter condition.	Required	65.0
operator	String	Relational operator that's used to compare the filter field with the filter value. Valid values are: <ul style="list-style-type: none"> Equals NotEquals 	Required	65.0

Seller Details Input

Input representation of the seller details for tax calculation.

JSON example

```

{
  "code": "ADIDAS"
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
code	String	Seller code as specified in the tax engine.	Required	62.0

Send Email Input

Input representation of the request to send an email for an invoice batch run.

JSON example

```

{
  "invoiceBatchRunId": "5IRLT000001SIJB4A4"
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
invoiceBatchRunId	String	ID of the invoice batch run record to send emails for the posted invoices of an invoice batch run.	Required	65.0

Sequence Policy Input

Input representation of the configured rules and properties to generate unique, sequential numbers for objects.

JSON example

This example shows a sample request to create a sequence policy.

```
{
  "name": "Sample Sequence Policy",
  "description": "This is a sample sequence policy.",
  "effectiveFromDateTime": "2025-08-10",
  "expirationDateTime": "2025-09-20",
  "isActive": true,
  "sequenceMode": "Basic",
  "targetObject": "Invoice",
  "dateStampFormat": "Yyyy",
  "sequenceStartNumber": 1,
  "incrementNumber": 1,
  "maximumSequenceNumber": 1000,
  "minimumSequenceNumberWidth": 2,
  "filterCriteria": "Custom",
  "selectionLogic": "selectionLogic",
  "sequencePattern": "INV-{SequenceValue}-abc",
  "selectionCondition": [
    {
      "filterField": "AppType",
      "operator": "Equals",
      "filterValue": "RLM",
      "conditionNumber": 1
    },
    {
      "filterField": "Status",
      "operator": "Equals",
      "filterValue": "Posted",
      "conditionNumber": 2
    },
    {
      "filterField": "LegalEntity",
      "operator": "Equals",
      "filterValue": "US",
      "conditionNumber": 3
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
dateStamp Format	String	Format of the stamp date that's appended to the sequence number. You can't edit this property by using the Update Sequence Policy API.	Required	65.0
description	String	Additional details about the sequence policy.	Optional	65.0
effectiveFrom DateTime	String	Date and time when the policy becomes effective. The default value is the current date.	Required	65.0
expiration DateTime	String	Date and time when the policy expires.	Optional	65.0
filter Criteria	String	Criteria to filter the target objects.	Required	65.0
increment Number	Integer	Value by which the sequence number increases until it reaches the maximum number. This value must be greater than or equal to 1. The default value is 1. You can't edit this property by using the Update Sequence Policy API.	Required	65.0
isActive	Boolean	Indicates whether the policy is active (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code> .	Required	65.0
maximumSequence Number	Integer	Maximum number the sequence number can reach.	Optional	65.0
minimumSequence NumberWidth	Integer	Minimum number of digits a sequence number must have. You can't edit this property by using the Update Sequence Policy API.	Optional	65.0
name	String	Name of the sequence policy.	Required	65.0
selection Condition	Selection Condition Input[]	Criteria to determine which sequence policy is applied to a record. This property includes conditions based on any standard or custom fields of the record.	Optional	65.0
selection Logic	String	Logic that determines the objects that the sequence policy applies to.	Optional	65.0
sequenceMode	String	Specifies how sequence numbers are generated. Valid values are:	Required	65.0

Name	Type	Description	Required or Optional	Available Version
		<ul style="list-style-type: none"> <code>Basic</code>—Assigns sequential numbers without gap reconciliation. <code>Gapless</code>—Assigns sequential numbers with gap reconciliation. The usage of this value ensures that the posted invoices don't have any numbering gaps for audits and compliance. <p>You can't edit this property by using the Update Sequence Policy API.</p>		
<code>sequencePattern</code>	String	Pattern structure that's followed for the sequence.	Required	65.0
<code>sequenceStartNumber</code>	Integer	Starting value of the sequence number, which must be greater than or equal to 0. The default value is 1. You can't edit this property by using the Update Sequence Policy API.	Required	65.0
<code>targetObject</code>	Object	Object that the policy is applied to. Valid value is <code>Invoice</code> . You can create a sequence policy for invoices only. You can't edit this property by using the Update Sequence Policy API.	Required	65.0
<code>timeZone</code>	String	Time zone that's applicable for the sequence policy.	Optional	65.0

Sequence Gap Reconciliation Input

Input representation of the details that are used to identify and reconcile gaps in sequence values based on the sequence policy or target object.

JSON example

This example shows a sample request that specifies the list of sequence policies for gap reconciliation.

```
{
  "sequencePolicyIds": [
    "1vdx0000000abc",
    "1vdx0000000def"
  ]
}
```

This example shows a sample request that specifies the target invoice object for gap reconciliation.

```
{
  "targetObjects": [
    "Invoice"
  ]
}
```

```

]
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
sequencePolicyIds	String[]	List of IDs of the sequence policies.	Required if the targetObjects property isn't specified. You must not specify both properties.	65.0
targetObjects	String[]	List of objects to which the policies are applied.	Required if the sequencePolicyIds property isn't specified. You must not specify both properties.	65.0

Sequences Assignment Input

Input representation of the details of the target objects to which the sequence pattern values are assigned.

JSON example

```

{
  "targetObjectIds": [
    "3ttxx00000005nhAAA",
    "3ttxx00000006bhAAA"
  ],
  "sequencePolicyId": "1Vdxx0000004CFU"
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
sequencePolicyId	String	ID of the sequence policy.	Optional	65.0
shouldPublishPlatformEvent	Boolean	Indicates whether to publish a platform event when a sequence is assigned to a target record (<code>true</code>) or not (<code>false</code>).	Optional	65.0
targetObjectIds	String[]	List of records to which the sequence pattern values are assigned.	Required	65.0

Standalone Credit Memo Charge Input

Input representation of the details of the charge lines of a credit memo.

JSON example

```
"charges": [
  {
    "chargeAmount": 100,
    "productId": "01tR0000000njDiIAI"
  }
]
```

Properties

Name	Type	Description	Required or Optional	Available Version
addresses	Credit Memo Addresses Input	Details of the billing and shipping addresses.	Optional	62.0
chargeAmount	Double	Charge amount for the credit memo.	Required	62.0
description	String	Description of the created credit memo charge line.	Optional	62.0
endDate	String	End date of the credit memo charge line.	Optional	62.0
isTax OnlyCredit	Boolean	Indicates whether the credit is for tax only (<code>true</code>) or not (<code>false</code>).	Optional	62.0
productId	String	ID of the product record that the credit memo is issued on.	Optional	62.0
productName	String	Name of the product that the credit memo is issued on.	Optional	62.0
startDate	String	Start date of the credit memo charge line.	Optional	62.0
taxEffective Date	String	Date from when the tax is applicable.	Optional	62.0
taxes	Standalone Credit Memo Tax Input[]	List of credit memo tax lines.	Optional	62.0
taxStrategy	String	Tax strategy to be applied to this credit memo charge line, child treatment lines, and tax lines. You can override the tax strategy at the individual credit memo lines or tax lines level. Valid values are: <ul style="list-style-type: none"> Ignore—Specifies that the creation of tax lines must be ignored. Manual Override—Specifies that the provided tax values must be considered for taxes. 	Optional	62.0

Name	Type	Description	Required or Optional	Available Version
		<ul style="list-style-type: none"> Calculate—Specifies that tax must be calculated by using the API. 		
treatmentId	String	ID of the tax treatment record that's used to calculate tax.	Optional	62.0

Standalone Credit Memo Input

Input representation of the details required to create a standalone credit memo.

JSON example

This example shows a sample request with the `Ignore` tax strategy.

```
{
  "billingAccountId": "001j000000WCFB800x",
  "type": "Posted",
  "description": "Standalone credit memo with ignored tax.",
  "currencyIsoCode": "USD",
  "taxStrategy": "Ignore",
  "charges": [
    {
      "chargeAmount": 100,
      "productId": "01tR0000000njDiIAI"
    }
  ]
}
```

This example shows a sample request with the `ManualOverride` tax strategy.

```
{
  "billingAccountId": "001DU000001nhoPYAQ",
  "description": "creditmemo-1",
  "currencyIsoCode": "USD",
  "taxStrategy": "ManualOverride",
  "charges": [
    {
      "productId": "01tDU000000EpKkYAK",
      "chargeAmount": 1000,
      "taxes": [
        {
          "taxAmount": 7.25,
          "taxCode": "CA-94121",
          "taxName": "CALIFORNIA",
          "taxRate": 0.25
        }
      ]
    }
  ]
}
```

This example shows a sample request with the `Calculate` tax strategy for a charge line.

```
{
  "billingAccountId": "001DU000001nhopYAQ",
  "description": "Standalone Credit Memo",
  "type": "Posted",
  "currencyIsoCode": "USD",
  "taxStrategy": "Ignore",
  "charges": [
    {
      "productId": "01tR0000000njDiIAI",
      "chargeAmount": 10,
      "taxStrategy": "Calculate",
      "treatmentId": "1ttxx00000001VZAAy"
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
billTo ContactId	String	Contact related to the credit memo.	Optional	62.0
billing AccountId	String	ID of the account that the credit is issued to.	Required	62.0
charges	Standalone Credit Memo Charge Input[]	Charge lines of the credit memo. Requires at least one charge line.	Required	62.0
currency IsoCode	String	ISO code currency of the new credit that's issued.	Optional	62.0
description	String	Description for the new credit that's issued.	Optional	62.0
effectiveDate	String	Effective date of the credit memo. If the value isn't specified, then it's null.	Optional	62.0
external Reference	String	ID of the external reference for the credit memo.	Optional	62.0
externalReference DataSource	String	Source of the external reference for the credit memo.	Optional	62.0
taxEffective Date	String	Effective date of the credit memo tax. If the value isn't specified, then it's null.	Optional	62.0
taxStrategy	String	Specifies how tax lines must be created for the standalone credit memos. Valid values are: <ul style="list-style-type: none"> • <code>Ignore</code>—Specifies that the creation of tax lines must be ignored. 	Required	62.0

Name	Type	Description	Required or Optional	Available Version
		<ul style="list-style-type: none"> Manual Override—Specifies that the provided tax values must be considered for taxes. Calculate—Specifies that tax must be calculated by using the API. 		
type	String	Type of credit memo to be created. Valid value is <code>Posted</code> .	Optional	62.0

Standalone Credit Memo Tax Input

Input representation of the details of the tax request.

JSON example

```
[
  {
    "taxAmount": 200,
    "taxName": "Federal Tax",
    "taxRate": 1
  },
  {
    "taxAmount": 500,
    "taxName": "State Tax",
    "taxRate": 1
  }
]
```

Properties

Name	Type	Description	Required or Optional	Available Version
taxAmount	Double	Amount of tax to be applied.	Required	62.0
taxCode	String	Tax code to be used to create the tax line.	Optional	62.0
taxName	String	Name of tax to be applied.	Optional	62.0
taxRate	Double	Tax rate to be used to create the tax line.	Optional	62.0

Suspend Billing Input

Input representation of the details of the request to suspend the billing operation for an account or a billing schedule group.

JSON example

```
{
  "referenceIds":
  [
```

```

    {
      "referenceId": "001DU000001o2UwYAI",
      "suspendDate": "2024-11-27",
      "resumeDate": "2024-12-27"
    }
  ]
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
referenceIds	Suspend Billing Object Input[]	Input representation of the account or billing schedule group IDs to suspend the billing operation for.	Required	63.0

Suspend Billing Object Input

Input representation of the details such as the ID of the account or billing schedule group along with the effective dates. These details are used to suspend the billing operation.

JSON example

```

{
  "referenceIds":
  [
    {
      "referenceId": "001DU000001o2UwYAI",
      "suspendDate": "2024-11-27",
      "resumeDate": "2024-12-27"
    }
  ]
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
referenceId	String	ID of the account or billing schedule group to suspend the billing operation for.	Required	63.0
resumeDate	String	Date until when the account or billing schedule group is suspended for billing.	Required	63.0
suspendDate	String	Date when the account or billing schedule group is suspended for billing.	Required	63.0

Tax Calculation Input

Input representation of the details of the request to calculate tax.

JSON example

This example shows a tax request for a specified invoice as the reference entity.

```
{
  "addresses": {
    "billTo": {
      "street": "123 Main Street",
      "city": "Bainbridge Island",
      "state": "WA",
      "postalCode": "98110",
      "country": "US"
    },
    "soldTo": {
      "street": "123 Main Street",
      "city": "Bainbridge Island",
      "state": "WA",
      "postalCode": "98110",
      "country": "US"
    },
    "shipFrom": {
      "street": "123 Alaskan Way",
      "city": "Seattle",
      "state": "WA",
      "country": "US",
      "postalCode": "98101"
    },
    "shipTo": {
      "street": "123 Main street",
      "city": "Bainbridge Island",
      "state": "WA",
      "postalCode": "98110",
      "country": "US"
    }
  },
  "currencyIsoCode": "USD",
  "customerDetails": {
    "accountId": "001xx000003HYD5AAO"
  },
  "description": "Monthly invoice for account 001xx000003HYEhAAO",
  "documentCode": "3ttxx0000000C7d_Debit-4wAxx000000000DEAY",
  "effectiveDate": "2022-03-09T10:30:41.000Z",
  "isCommit": true,
  "lineItems": [
    {
      "quantity": 1,
      "amount": 100,
      "taxCode": "TX0001",
      "productCode": "Y0001",
      "productSKU": "PRES-RX-12896745",
      "description": "New Product",
      "effectiveDate": "2022-03-09T10:30:41.000Z",
      "lineNumber": "5TVxx0000004C92GAE",
      "addresses": {
        "shipFrom": {
```

```

        "street": "123 Alaskan Way",
        "city": "Seattle",
        "state": "WA",
        "country": "US",
        "postalCode": "98101",
        "latitude": 45.12,
        "longitude": 45.12
    },
    "shipTo": {
        "street": "123 Auburn Blvd",
        "city": "Sacramento",
        "state": "CA",
        "country": "US",
        "postalCode": "95841",
        "latitude": 45.12,
        "longitude": 45.12
    },
    "soldTo": {
        "street": "123 Auburn Blvd",
        "city": "Sacramento",
        "state": "CA",
        "country": "US",
        "postalCode": "95841",
        "latitude": 45.12,
        "longitude": 45.12
    },
    "billTo": {
        "street": "123 Auburn Blvd",
        "city": "Sacramento",
        "state": "CA",
        "country": "US",
        "postalCode": "95841",
        "latitude": 45.12,
        "longitude": 45.12
    }
}
    ],
    "referenceDocumentCode" = null,
    "referenceEntityId": "3ttxx0000000C7d",
    "shouldVoidTax": false,
    "taxEngineId": "4wAxx0000000g8v",
    "taxType": "Actual",
    "taxTransactionType": "Debit",
    "transactionDate": "2022-03-09T10:30:41.000Z"
}

```

This example shows a tax request for a specified credit memo as the reference entity.

```

{
  "addresses": {
    "billTo": {
      "street": "123 Main Street",
      "city": "Bainbridge Island",
      "state": "WA",

```

```
    "postalCode": "98110",
    "country": "US"
  },
  "soldTo": {
    "street": "123 Main Street",
    "city": "Bainbridge Island",
    "state": "WA",
    "postalCode": "98110",
    "country": "US"
  },
  "shipFrom": {
    "street": "123 Alaskan Way",
    "city": "Seattle",
    "state": "WA",
    "country": "US",
    "postalCode": "98101"
  },
  "shipTo": {
    "street": "123 Main street",
    "city": "Bainbridge Island",
    "state": "WA",
    "postalCode": "98110",
    "country": "US"
  }
},
"currencyIsoCode": "USD",
"customerDetails": {
  "accountId": "001xx000003HYD5AAO"
},
"description": "Monthly credit memo for account 001xx000003HYEhAAO",
"documentCode": "50gxx000000g27KAAQ-4wAxx000000000ODEAY",
"effectiveDate": "2022-03-09T10:30:41.000Z",
"isCommit": true,
"lineItems": [
  {
    "quantity": 1,
    "amount": 100,
    "taxCode": "TX0001",
    "productCode": "Y0001",
    "productSKU": "PRES-RX-12896745",
    "description": "New Product",
    "effectiveDate": "2022-03-09T10:30:41.000Z",
    "lineNumber": "5TVxx0000004C92GAE",
    "addresses": {
      "shipFrom": {
        "street": "123 Alaskan Way",
        "city": "Seattle",
        "state": "WA",
        "country": "US",
        "postalCode": "98101",
        "latitude": 45.12,
        "longitude": 45.12
      },
      "shipTo": {
```

```

        "street": "123 Auburn Blvd",
        "city": "Sacramento",
        "state": "CA",
        "country": "US",
        "postalCode": "95841",
        "latitude": 45.12,
        "longitude": 45.12
    },
    "soldTo": {
        "street": "123 Auburn Blvd",
        "city": "Sacramento",
        "state": "CA",
        "country": "US",
        "postalCode": "95841",
        "latitude": 45.12,
        "longitude": 45.12
    },
    "billTo": {
        "street": "123 Auburn Blvd",
        "city": "Sacramento",
        "state": "CA",
        "country": "US",
        "postalCode": "95841",
        "latitude": 45.12,
        "longitude": 45.12
    }
}
}
}
],
"referenceDocumentCode" = null,
"referenceEntityId": "50gxx000000g27K",
"shouldVoidTax": false,
"taxEngineId": "4wAxx000000g8v",
"taxType": "Actual",
"taxTransactionType": "Debit",
"transactionDate": "2022-03-09T10:30:41.000Z"
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
addresses	Addresses	Address details for tax calculation.	Optional	62.0
currencyIsoCode	String	Currency ISO code that's used for tax calculation.	Optional	62.0
customerDetails	Customer Details	Customer details for determining the applicable tax.	Optional	62.0
description	String	Description of the tax transaction.	Optional	62.0
documentCode	String	Unique identifier for the tax document. If the <code>documentCode</code> property isn't	Optional	62.0

Name	Type	Description	Required or Optional	Available Version
		specified, the tax engine auto-generates it.		
<code>effectiveDate</code>	String	Date when the tax rules are applied. If a tax rate changes on a specific date, the <code>effectiveDate</code> property ensures the correct rate is applied based on the transaction's timing. For credit-based tax callouts, specify the original invoice date.	Optional	62.0
<code>isCommit</code>	Boolean	Indicates whether to submit the transaction to the tax engine for reporting (<code>true</code>) or not (<code>false</code>). This property value is <code>true</code> for invoices and credit memos with the <code>Posted</code> status.	Optional	62.0
<code>lineItems</code>	Line Item Input []	Details of the line items for calculating the applicable tax.	Required	62.0
<code>referenceDocumentCode</code>	String	Reference document code. For subsequent transactions such as a credit tax, this property value specifies the original document code. For credit-based tax callouts, specify the original invoice ID.	Optional	62.0
<code>referenceEntityId</code>	String	ID of the related quote, invoice, and other transaction documents.	Optional	62.0
<code>sellerDetails</code>	Seller Details Input	Seller details for tax calculation.	Optional	62.0
<code>shouldVoidTax</code>	Boolean	Indicates whether to void the tax transaction associated with a document that's mentioned as the <code>referenceDocumentCode</code> property value with <code>taxType</code> property value as <code>Actual</code> and <code>isCommit</code> property value set to <code>true</code> . Keep these considerations in mind when you use this property. <ul style="list-style-type: none"> If the <code>shouldVoidTax</code> property value is set to <code>true</code>, then the operation returns a response with 	Optional	65.0

Name	Type	Description	Required or Optional	Available Version
		<p><code>documentCode</code> property value updated to <code>referenceDocumentCode</code> property value that was originally sent in the request payload. The response also includes the <code>taxTransactionType</code> property value as <code>void</code>. This indicates that the document specified in the <code>referenceDocumentCode</code> property value is voided.</p> <ul style="list-style-type: none"> • If document is locked or you can't void the tax transaction for any reason, then you can use the Tax Calculation request to perform another transaction such as a Credit Tax request. In this scenario, the response includes the <code>documentCode</code> property value that was sent in the request payload. • If the document that's mentioned in the <code>referenceDocumentCode</code> property value isn't available in the tax engine, then an error response occurs with ResultCode on page 1107 value as <code>ReferenceDocumentCodeMissing</code>. 		
<code>taxEngineId</code>	String	ID of the tax engine that's used to calculate tax.	Required	62.0
<code>taxTransactionType</code>	String	<p>Type of the tax transaction. Valid values are:</p> <ul style="list-style-type: none"> • <code>Debit</code>—Increases tax liability for the seller, requiring the seller to pay tax on the transaction. • <code>Credit</code>—Decreases tax liability for the seller, resulting in a tax refund for the seller. • <code>void</code>—Reserved for internal use. <p>The default value is <code>Debit</code>.</p>	Optional	62.0
<code>taxType</code>	String	<p>Type of the tax. Valid values are:</p> <ul style="list-style-type: none"> • <code>Actual</code>—Exact tax amount that's calculated based on actual sales. 	Required	62.0

Name	Type	Description	Required or Optional	Available Version
		<ul style="list-style-type: none"> Estimated— Estimated tax amount, which is adjusted later to match actual tax calculations. <p>For draft invoices and quote records, the tax type is marked as <code>Estimated</code>. After draft invoices are posted and the status changes to <code>Posted</code>, the tax type is updated to <code>Actual</code>. Similarly, when a quote record is finalized and converted into an actual order, the tax type is also updated to <code>Actual</code>.</p>		
<code>transactionDate</code>	String	Date of the transaction that appears on the invoice, order, and other transaction documents.	Required	62.0

Void Posted Invoice Input

Input representation of the details of the invoice to be voided.

Properties

Name	Type	Description	Required or Optional	Available Version
<code>invoiceId</code>	String	ID of the posted invoice to be voided.	Required	62.0

Response Bodies

Learn more about the available response bodies of Billing APIs.

[Addresses](#)

Output representation of the details of the addresses that are used for calculating tax.

[Address](#)

Output representation of the location code associated with an address.

[Batch Invoice Document Generation](#)

Output representation of the request to generate or regenerate the PDF documents for the invoices that are in the `Draft` or `Posted` status.

[Error Response for Batch Invoice Document Generation](#)

Output representation of the error details associated with the Batch Invoice Document Generation API.

[Batch Invoice Scheduler](#)

Output representation of the details of an invoice scheduler.

[Batch Payment Scheduler](#)

Output representation of the details of a payment scheduler.

[Billing Batch Scheduler](#)

Output representation of the details of a created invoice or payment scheduler.

[Billing Schedule Recovery List](#)

Output representation of the recovered details of the billing schedules and associated invoice.

[Billing Schedule Recovery](#)

Output representation of the details of the recovered billing schedules.

[Context-Aware Billing Schedule](#)

Output representation of the context-aware billing schedule.

[Context-Aware Billing Schedule Error](#)

Output representation of the error response related to the generation of the billing schedule.

[Convert Negative Invoice Lines](#)

Output representation of the details of the created memo along with the status of the request.

[Credit Memo Apply](#)

Output representation of the list of applied credit memo results.

[Credit Memo Apply List](#)

Output representation of the list of applied credit memo results.

[Credit Memo Post](#)

Output representation of the request to post a credit memo.

[Credit Memo Unapply](#)

Output representation of the details of the credit memo invoice application record with the status of the request.

[Credit Memo Line Applied](#)

Output representation of the list of applied credit memo line results.

[Credit Memo Line Applied Response](#)

Output representation of the list of applied credit memo line results.

[Credit Memo Line Unapplied](#)

Output representation of the details of the credit memo line invoice line record with the status of the request.

[Invoice Batch Draft To Posted](#)

Output representation of the batch update details of the invoices from `Draft` to `Posted` status.

[Invoice Batch Run Recovery](#)

Output representation of the details of the invoice batch run recovery record.

[Invoice Ingestion](#)

Output representation of the details of the generated invoices.

[Invoice Ingestion Details](#)

Output representation of the details of a generated invoice.

[Invoice Ingestion Output Error](#)

Output representation of the details of an invoice generation error.

[Invoice Line Preview](#)

Output representation of the invoice line preview result.

[Invoice Preview](#)

Output representation of the invoice preview result.

[Invoice Preview Result](#)

Output representation of the list of preview invoices that are generated for the billing transaction.

[Invoice Recovery](#)

Output representation of the details of the recovered invoice and billing schedules.

[Line Item](#)

Output representation of the details of the line item.

[Payment Line Apply](#)

Output representation of the details of the applied payment line. The details include the ID of the payment record and date when the payment line was applied.

[Payment Line Unapply](#)

Output representation of the details of the reversed payment line application. The details include the ID of the payment line record and date when the payment line application was reversed.

[Payment Scheduler Update](#)

Output representation of the details of the updated payment scheduler. This representation covers the updated status value of the specified payment scheduler.

[Posted Invoice List Write-Off](#)

Output representation of the list of invoices that are written off.

[Posted Invoice Write-Off](#)

Output representation of the details of a posted invoice that's written off.

[Posted Invoice Write-Off Error](#)

Output representation of the error response that's associated with a request to write off a posted invoice.

[Reference Line Error](#)

Output representation of the details of the line level errors.

[Refund Line Applied Response](#)

Output representation of the details of an applied refund. This representation includes the properties of a refund line, such as the date when the refund is applied against a payment and ID of the refund line record.

[Revenue Async Line Level](#)

Output representation of the result of the API request for the async line level operations.

[Revenue Async Response](#)

Output representation of the result of the API request with the request identifier.

[Send Email Error](#)

Output representation of the error response of the API request to send emails for posted invoices.

[Send Email Response](#)

Output representation of the API request to send emails for posted invoices.

[Sequence Error](#)

Output representation of the error response that's associated with a request to create or update a sequence policy, or assign sequences.

[Sequence Gap Reconciliation Error](#)

Output representation of the errors encountered during the processing of the API request.

[Sequence Gap Reconciliation](#)

Output representation of the details of the sequence gap reconciliation.

[Sequence Policy](#)

Output representation that shows the status of the assigned sequence pattern values.

[Sequences Assignment](#)

Output representation with the status of the assigned sequence pattern values.

[Sequences Assignment Result](#)

Output representation of the details of the assigned sequence values to target objects.

[Suspend Resume Billing](#)

Output representation of the list of accounts and billing schedule groups, which are suspended or resumed for billing operations.

[Suspend Resume Billing Object](#)

Output representation of the details of accounts and billing schedule groups, which are suspended or resumed for billing operations, along with the status of the API request.

[Tax Amount Details](#)

Output representation of the details of the tax amount.

[Tax Calculation](#)

Output representation of the details of the calculated tax.

[Tax Details](#)

Output representation of the tax details for each line item.

[Tax Engine Log](#)

Output representation of the logs that the tax engine generates.

[Tax Imposition](#)

Output representation of the details of the imposed tax.

[Tax Jurisdiction](#)

Output representation of the details of the tax jurisdiction for the tax line.

Addresses

Output representation of the details of the addresses that are used for calculating tax.

JSON example

```
{
  "addresses": {
    "shipFrom": {
      "locationCode": "67890"
    },
    "shipTo": {
      "locationCode": "12345"
    },
    "soldTo": {
      "locationCode": "12345"
    }
  }
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
shipFrom	Address on page 2059	Address that the item is shipped from.	Big, 62.0	62.0
shipTo	Address on page 2059	Address that the item is shipped to.	Big, 62.0	62.0
soldTo	Address on page 2059	Address that the item is sold to.	Big, 62.0	62.0

Address

Output representation of the location code associated with an address.

JSON example

```
{
  "locationCode": "123456789"
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
locationCode	String	Unique location code of the address.	Big, 62.0	62.0

Batch Invoice Document Generation

Output representation of the request to generate or regenerate the PDF documents for the invoices that are in the `Draft` or `Posted` status.

JSON example

```
{
  "errors": [
    {
      "errorCode": "API_DISABLED_FOR_ORG",
      "errorMessage": "Document Generation is not enabled for this org!"
    },
    {
      "errorCode": "INVALID_API_INPUT",
      "errorMessage": "Invalid Invoice Batch Run Id"
    }
  ],
  "requestIdentifier": "5IRDU000000009i4AA",
  "success": false
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
errors	Batch Invoice Document Generation Error []	Details of the error if the operation fails.	Big, 63.0	63.0

Property Name	Type	Description	Filter Group and Version	Available Version
requestIdentifier	String	Unique ID that's associated with the specific error, and is used for tracking and referencing the request.	Big, 63.0	63.0
success	Boolean	Indicates whether the operation is successful (<code>true</code>) or not (<code>false</code>).	Big, 63.0	63.0

Error Response for Batch Invoice Document Generation

Output representation of the error details associated with the Batch Invoice Document Generation API.

JSON example

```
"errors": {
  "errorCode": "API_DISABLED_FOR_ORG",
  "message": "Document Generation is not enabled for this org!"
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
errorCode	String	Code for the resultant error.	Big, 63.0	63.0
errorMessage	String	Error message for the resultant error.	Big, 63.0	63.0

Batch Invoice Scheduler

Output representation of the details of an invoice scheduler.

JSON example

```
{
  "billingBatchScheduler": {
    "id": "5BSxx0000004TwGGAU"
  }
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
billingBatch Scheduler	Billing Batch Scheduler	Details of the created invoice scheduler.	Big, 62.0	62.0

Batch Payment Scheduler

Output representation of the details of a payment scheduler.

JSON example

```
{
  "billingBatchScheduler": {
    "id": "5BSxx0000004TwGGAU"
  }
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
billingBatch Scheduler	Billing Batch Scheduler	Details of the payment scheduler.	Big, 64.0	64.0

Billing Batch Scheduler

Output representation of the details of a created invoice or payment scheduler.

JSON example

```
"billingBatchScheduler": {
  "id": "5BSxx0000004TwGGAU"
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
id	String	ID of the invoice or payment scheduler.	Big, 62.0	62.0

Billing Schedule Recovery List

Output representation of the recovered details of the billing schedules and associated invoice.

JSON example

```
{
  "recoveryResults": [
    {
      "billingSchedules": [
        {
          "billingScheduleId": "44bDU00000000XX",
          "billingScheduleStatus": "ReadyForInvoicing"
        }
      ],
      "invoiceErrors": [],
      "invoiceId": null,
      "success": true
    }
  ]
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
recovery Results	Invoice Recovery[]	Details of the recovered invoice and billing schedules.	Big, 62.0	62.0

Billing Schedule Recovery

Output representation of the details of the recovered billing schedules.

JSON example

```

"billingSchedules": [
  {
    "billingScheduleId": "44bDU00000000XX",
    "billingScheduleStatus": "ReadyForInvoicing"
  }
]

```

Property Name	Type	Description	Filter Group and Version	Available Version
billing ScheduleId	String	ID of the billing schedule.	Big, 62.0	62.0
billing Schedule Status	String	Flag that indicates the billing schedule status.	Big, 62.0	62.0

Context-Aware Billing Schedule

Output representation of the context-aware billing schedule.

JSON example

This request shows a sample success response.

```

{
  "errors": null,
  "requestIdentifier": "16Pxx0000004CaS",
  "statusURL": "/services/data/v65.0/subjects/AsyncOperationTracker/16Pxx0000004CaSEAU",
  "success": true
}

```

This request shows a sample error response.

```

{
  "errors": [
    {
      "errorCode": "REQUIRED_FIELD_MISSING",
      "errorMessage": "Required fields are missing: billToContact",
      "referenceId": "802xx000001nmb5"
    }
  ]
}

```

```

],
"requestIdentifier": "16Pxx0000004CYq",
"statusURL": "/services/data/v65.0/subjects/AsyncOperationTracker/16Pxx0000004CYqEAM",
"success": false
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
errors	Context Aware Billing Schedule Error[]	Error response if the generation of the billing schedule fails.	Big, 62.0	62.0
request Identifier	String	Unique request identifier that you can use to poll the asynchronous request.	Big, 62.0	62.0
statusURL	String	Status URL to track the operation.	Big, 62.0	62.0
success	Boolean	Indicates whether the processing of the billing schedule is successful (<code>true</code>) or not (<code>false</code>).	Big, 62.0	62.0

Context-Aware Billing Schedule Error

Output representation of the error response related to the generation of the billing schedule.

```

"errors": [
  {
    "errorCode": "REQUIRED_FIELD_MISSING",
    "errorMessage": "Required fields are missing: billToContact",
    "referenceId": "802xx000001nmb5"
  }
]

```

Property Name	Type	Description	Filter Group and Version	Available Version
errorCode	String	Code for the resultant error.	Big, 62.0	62.0
errorMessage	String	Error message for the resultant error.	Big, 62.0	62.0
referenceId	String	Reference ID of the source item that resulted in the error.	Big, 62.0	62.0

Convert Negative Invoice Lines

Output representation of the details of the created memo along with the status of the request.

JSON example

```

{
  "id": "50gxx000000g0WwAAI",

```

```
"success": true,
"errors": []
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
errors	Error Response	List of errors encountered during the processing of the API request.	Big, 62.0	62.0
id	String	ID of the credit memo that's created after the conversion of the negative invoice lines.	Small, 62.0	62.0
success	Boolean	Indicates whether the API request is successful (<code>true</code>) or not (<code>false</code>).	Small, 62.0	62.0

Credit Memo Apply

Output representation of the list of applied credit memo results.

JSON example

```
"applyCreditResults" : [ {
  "appliedToId" : "3ttxx000000003FAAQ",
  "errors" : null,
  "id" : "4sFxx00000002ppEAA",
  "success" : true
}, {
  "appliedToId" : "3ttxx0000000001AAA",
  "errors" : null,
  "id" : "4sFxx00000002pqEAA",
  "success" : true
} ]
```

Property Name	Type	Description	Filter Group and Version	Available Version
appliedToId	String	ID of the invoice record that the credit is applied to.	Big, 62.0	62.0
errors	Error Response	List of errors encountered during the processing of the API request.	Big, 62.0	62.0
id	String	ID of the credit memo invoice application.	Big, 62.0	62.0
success	Boolean	Indicates whether the credit memo is successfully applied (<code>true</code>) or not (<code>false</code>).	Big, 62.0	62.0

Credit Memo Apply List

Output representation of the list of applied credit memo results.

JSON example

```
{
  "applyCreditResults" : [ {
    "appliedToId" : "3ttxx000000003FAAQ",
    "errors" : null,
    "id" : "4sFxx00000002ppEAA",
    "success" : true
  }, {
    "appliedToId" : "3ttxx0000000001AAA",
    "errors" : null,
    "id" : "4sFxx00000002pqEAA",
    "success" : true
  } ]
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
applyCredit Results	Credit Memo Apply[]	Output list of the applied credit memo results.	Big, 62.0	62.0

Credit Memo Post

Output representation of the request to post a credit memo.

JSON example

This example shows a sample successful response.

```
{
  "errors": [],
  "requestIdentifier": "d3a9d9ce-2a83-4a08-bcf3-df0348a0008c",
  "statusURL": "/services/data/v65.0/subjects/AsyncOperationTracker/16PDU000000A4oz2AC",
  "success": true
}
```

This example shows a sample error response.

```
{
  "errors": [
    {
      "errorCode": "BAD_REQUEST",
      "message": "You can post up to 1 credit memo at a time."
    }
  ],
  "requestIdentifier": "9065b043-dcc3-4dcf-b5a1-55fdf5a79f7b",
  "statusURL": "",
  "success": false
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
errors		List of errors encountered during the processing of the API request.	Big, 65.0	65.0
requestIdentifier	String	Unique request identifier for the request.	Big, 65.0	65.0
statusURL	String	Status URL for tracking this operation.	Big, 65.0	65.0
success	Boolean	Indicates whether the API request was successful (<code>true</code>) or not (<code>false</code>).	Big, 65.0	65.0

Credit Memo Unapply

Output representation of the details of the credit memo invoice application record with the status of the request.

JSON example

```
{
  "errors": [],
  "id": "4sFxx00000002ppEAA",
  "success": true
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
errors	Error Response	List of errors encountered during the processing of the API request.	Big, 62.0	62.0
id	String	ID of the credit memo invoice application record.	Small, 62.0	62.0
success	Boolean	Indicates whether the credit memo is successfully unapplied (<code>true</code>) or not (<code>false</code>).	Small, 62.0	62.0

Credit Memo Line Applied

Output representation of the list of applied credit memo line results.

JSON example

```
{
  "appliedCreditResponses": [
    {
      "creditMemoLineInvoiceLineId": "4sGSG0000002pMb2AI",
      "errors": null,
      "invoiceLineId": "5TVSG0000003CuH4AU",
      "success": true
    }
  ]
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
applied CreditResponses	Credit Memo Line Applied Response []	Output list for the applied credit memo line results.	Big, 62.0	62.0

Credit Memo Line Applied Response

Output representation of the list of applied credit memo line results.

JSON example

```
"appliedCreditResponses": [
  {
    "creditMemoLineInvoiceLineId": "4sGSG0000002pMb2AI",
    "errors": null,
    "invoiceLineId": "5TVSG0000003CuH4AU",
    "success": true
  }
]
```

Property Name	Type	Description	Filter Group and Version	Available Version
creditMemo LineInvoice LineId	String	ID of the credit memo line invoice line ID.	Big, 62.0	62.0
errors	Error Response	List of errors encountered during the processing of the API request.	Big, 62.0	62.0
invoiceLineId	String	ID of the invoice line record that the credit is applied to.	Big, 62.0	62.0
success	Boolean	Indicates whether the credit memo line is successfully applied (<code>true</code>) or not (<code>false</code>).	Big, 62.0	62.0

Credit Memo Line Unapplied

Output representation of the details of the credit memo line invoice line record with the status of the request.

JSON example

```
{
  "creditMemoLineInvoiceLineId": "4sGSG0000002pOD2AY",
  "errors": [],
  "success": true
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
creditMemoLineInvoiceLineId	String	ID of the credit memo line invoice line record.	Small, 62.0	62.0
errors	Error Response	List of errors encountered during the processing of the API request.	Big, 62.0	62.0
success	Boolean	Indicates whether the credit memo line is successfully unapplied (<code>true</code>) or not (<code>false</code>).	Small, 62.0	62.0

Invoice Batch Draft To Posted

Output representation of the batch update details of the invoices from `Draft` to `Posted` status.

JSON example

```
{
  "invoiceBatchDraftToPostedId": "4sFDU0000000652AA",
  "success": true
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
invoiceBatchDraftToPostedId	String	ID of the invoice batch draft to posted run record that's created to track the batch process of posting the draft invoices that are associated with the parent invoice batch run record.	Small, 62.0	62.0
success	Boolean	Indicates whether the API request is successful (<code>true</code>) or not (<code>false</code>).	Small, 62.0	62.0

Invoice Batch Run Recovery

Output representation of the details of the invoice batch run recovery record.

JSON example

```
{
  "invoiceBatchRunRecoveryId": ["0wBxx0000004TtwGAU"]
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
invoiceBatchRunRecoveryId	String	ID of the invoice batch run recovery record for the specified invoice batch run. This	Small, 62.0	62.0

Property Name	Type	Description	Filter Group and Version	Available Version
		record represents the background recovery process.		

Invoice Ingestion

Output representation of the details of the generated invoices.

JSON example

```
{
  "invoices": [
    {
      "errors": null,
      "invoiceId": "3ttxx000000GRNAA2",
      "requestIdentifier": "16e80fbc-e7b3-4462-9439-745647fcf0a8",
      "statusURL":
"/services/data/v63.0/subjects/AsyncOperationTracker/16Pxx0000004Gz2EAE",
      "success": true
    }
  ]
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
invoices	Invoice Ingestion []	Result that contains the details for each generated invoice.	Big, 63.0	63.0

Invoice Ingestion Details

Output representation of the details of a generated invoice.

JSON example

```
{
  "invoices": [
    {
      "errors": null,
      "invoiceId": "3ttxx000000GRNAA2",
      "requestIdentifier": "16e80fbc-e7b3-4462-9439-745647fcf0a8",
      "statusURL":
"/services/data/v63.0/subjects/AsyncOperationTracker/16Pxx0000004Gz2EAE",
      "success": true
    }
  ]
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
errors	Invoice Ingestion Output Error []	Details of the errors if the request was unsuccessful.	Small, 63.0	63.0
invoiceId	String	ID of the Invoice record that's created in Salesforce.	Small, 63.0	63.0
request Identifier	String	Unique request identifier that can be used to poll the async request.	Small, 63.0	63.0
statusURL	String	Status URL for tracking the estimated tax callout operation.	Big, 63.0	63.0
success	Boolean	Indicates whether the API request was successful (<code>true</code>) or not (<code>false</code>).	Small, 63.0	63.0

Invoice Ingestion Output Error

Output representation of the details of an invoice generation error.

Property Name	Type	Description	Filter Group and Version	Available Version
errorCode	String	Code that indicates the type of error.	Small, 63.0	63.0
message	String	Message that states the reason for error, if any.	Small, 63.0	63.0
referenceId	String	Reference ID that maps to the subrequest's response and can be used to reference the response in later subrequests.	Small, 63.0	63.0

Invoice Line Preview

Output representation of the invoice line preview result.

JSON example

```
"invoiceLineDetailList": [
  {
    "billingFrequency": "OneTime",
    "chargeAmount": "1990.00",
    "endDate": "2024-07-18",
    "lineAmount": "2189.00",
    "productName": "Laptop",
    "quantity": "10.0",
    "startDate": "2024-07-18",
    "taxAmount": "199.0",
    "unitPrice": "199.0"
  }
]
```

Property Name	Type	Description	Filter Group and Version	Available Version
billingFrequency	String	The frequency at which the invoice line is created for the billing transaction.	Big, 63.0	63.0
endDate	String	The end date of the billing for the service for invoice lines made from a time-based service.	Big, 63.0	63.0
lineAmount	String	The amount of the invoice line.	Big, 63.0	63.0
productName	String	The name of the product that was charged or ordered to create the invoice line.	Big, 63.0	63.0
quantity	String	The number of units of the order product that created the invoice line.	Big, 63.0	63.0
startDate	String	The first date of the billing for the service for invoice lines made from a time-based service.	Big, 63.0	63.0
taxAmount	String	The tax amount for the invoice line.	Big, 63.0	63.0
unitPrice	String	The price for one unit of the item on the invoice line.	Big, 63.0	63.0

Invoice Preview

Output representation of the invoice preview result.

JSON example

```
"invoiceDetailList": [
  {
    "accountId": "001Z6000005aQj8",
    "currencyIsoCode": "USD",
    "dueDate": "2025-01-03",
    "invoiceDate": "2024-12-04",
    "invoiceLineDetailList": [
      {
        "billingFrequency": "OneTime",
        "chargeAmount": "1990.00",
        "endDate": "2024-07-18",
        "lineAmount": "2189.00",
        "productName": "Laptop",
        "quantity": "10.0",
        "startDate": "2024-07-18",
        "taxAmount": "199.0",
        "unitPrice": "199.0"
      }
    ],
    "totalAmount": "1990.00",
    "totalAmountWithTax": "2189.00",
    "totalTaxAmount": "199.0"
  }
]
```

```
}
]
```

Property Name	Type	Description	Filter Group and Version	Available Version
accountId	String	The account ID of the billing transaction.	Big, 63.0	63.0
currencyCode	String	The currency code for the amount fields.	Big, 63.0	63.0
dueDate	String	The date by when the customer must pay an invoice that's generated for the billing transaction.	Big, 63.0	63.0
invoiceDate	String	The date when an invoice that's generated for the billing transaction is posted.	Big, 63.0	63.0
invoiceLines	Invoice Line Preview []	The details of the invoice lines related to the invoices that are generated for the billing transaction.	Big, 63.0	63.0
totalAmount	String	The sum of the total amount on the invoice lines of an invoice that's generated for the billing transaction.	Big, 63.0	63.0
totalAmount WithTax	String	The sum of the total amount including tax on the invoice lines of an invoice that's generated for the billing transaction.	Big, 63.0	63.0
totalTax Amount	String	The sum of the tax amount on the invoice lines of an invoice that's generated for the billing transaction.	Big, 63.0	63.0

Invoice Preview Result

Output representation of the list of preview invoices that are generated for the billing transaction.

JSON example

```
{
  "invoiceDetailList": [
    {
      "accountId": "001Z6000005aQj8",
      "currencyIsoCode": "USD",
      "dueDate": "2025-01-03",
      "invoiceDate": "2024-12-04",
      "invoiceLineDetailList": [
        {
          "billingFrequency": "OneTime",
          "chargeAmount": "1990.00",
          "endDate": "2024-07-18",
          "lineAmount": "2189.00",
          "productName": "Laptop",
          "quantity": "10.0",

```

```

        "startDate": "2024-07-18",
        "taxAmount": "199.0",
        "unitPrice": "199.0"
      }
    ],
    "totalAmount": "1990.00",
    "totalAmountWithTax": "2189.00",
    "totalTaxAmount": "199.0"
  }
]
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
invoiceDetail List	Invoice Preview []	Details of the invoices that are generated for the billing transaction.	Big, 63.0	63.0

Invoice Recovery

Output representation of the details of the recovered invoice and billing schedules.

JSON example

```

{
  "recoveryResults": [
    {
      "billingSchedules": [
        {
          "billingScheduleId": "44bDU00000000XX",
          "billingScheduleStatus": "ReadyForInvoicing"
        }
      ],
      "invoiceErrors": [],
      "invoiceId": null,
      "success": true
    }
  ]
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
billing Schedules	Billing Schedule Recovery []	Billing schedules associated with this invoice.	Big, 62.0	62.0
invoiceErrors	Error Response	List of errors encountered during the invoice recovery.	Big, 62.0	62.0
invoiceId	String	ID of the recovered invoice.	Big, 62.0	62.0
invoiceStatus	String	Flag that indicates the invoice status.	Big, 62.0	62.0

Property Name	Type	Description	Filter Group and Version	Available Version
success	Boolean	Indicates whether the overall transaction was successful or not (<code>true</code>) or not (<code>false</code>).	Big, 62.0	62.0

Line Item

Output representation of the details of the line item.

JSON example

```
{
  "lineItems": [
    {
      "addresses": {
        "shipFrom": {
          "locationCode": "67890"
        },
        "shipTo": {
          "locationCode": "12345"
        },
        "soldTo": {
          "locationCode": "12345"
        }
      },
      "amountDetails": {
        "exemptAmount": 0,
        "taxAmount": 12.5,
        "totalAmount": 100,
        "totalAmountWithTax": 112.5
      },
      "effectiveDate": "2022-03-09T10:55:38.416Z",
      "lineNumber": "001xx000003HYEiAAO",
      "productCode": "Y0001",
      "quantity": 1,
      "taxCode": "TX0001",
      "taxes": [
        {
          "exemptAmount": 0,
          "exemptReason": "NoExemption",
          "imposition": {
            "type": "General"
          },
          "jurisdiction": {
            "country": "US",
            "id": "63000",
            "level": "CIT",
            "name": "SEATTLE",
            "region": "WA",
            "stateAssignedNo": "1726"
          },
          "rate": 12.5,

```

```

        "tax": 12.5,
        "taxId": "11000378132466",
        "taxableAmount": 100
      }
    ]
  }
]
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
addresses	Addresses	Different types of addresses that are used for the transaction of the line item.	Big, 62.0	62.0
amountDetails	Tax Amount Details	Details of the transaction amount and the taxes applicable for the line item.	Big, 62.0	62.0
effectiveDate	String	Date when the tax rules are applied on the line item.	Big, 62.0	62.0
lineNumber	String	Unique identifier of the line item.	Big, 62.0	62.0
productCode	String	Product code of the line item as defined by the tax engine.	Big, 62.0	62.0
quantity	Double	Quantity of the line item.	Big, 62.0	62.0
taxCode	String	Tax code of the line item according to the tax engine.	Big, 62.0	62.0
taxes	Tax Details []	Tax details of the line item.	Big, 62.0	62.0

Payment Line Apply

Output representation of the details of the applied payment line. The details include the ID of the payment record and date when the payment line was applied.

JSON example

```

{
  "appliedDate": "2020-08-11T08:09:01.000Z",
  "id": "1PLR000000000dDOAQ"
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
appliedDate	String	Date when the payment line was applied.	Big, 64.0	64.0
id	String	ID of the payment line record.	Big, 64.0	64.0

Payment Line Unapply

Output representation of the details of the reversed payment line application. The details include the ID of the payment line record and date when the payment line application was reversed.

JSON example

```
{
  "unappliedDate": "2020-08-11T08:09:01.000Z",
  "id": "1PLR00000000dDOAQ"
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
id	String	ID of the payment line record.	Big, 64.0	64.0
unappliedDate	String	Date when the payment line application was reversed.	Big, 64.0	64.0

Payment Scheduler Update

Output representation of the details of the updated payment scheduler. This representation covers the updated status value of the specified payment scheduler.

JSON example

```
{
  "status": "Active"
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
status	String	Updated status value of the specified payment scheduler. Valid values are: <ul style="list-style-type: none"> • Active • Canceled • Draft • Inactive 	Big, 64.0	64.0

Posted Invoice List Write-Off

Output representation of the list of invoices that are written off.

JSON example

```
{
  "result": [
    {
      "requestIdentifier": null,
    }
  ]
}
```



```

    "invoiceId": "3t00000000CwAGI",
    "success": false,
    "errors": {
      "errorCode": "INVALID_API_INPUT",
      "errorMessage": "Reason is missing."
    }
  },
  {
    "requestIdentifier": 37612787,
    "invoiceId": "3t00000000CwAAI",
    "success": true,
    "errors": {
      "errorCode": null,
      "errorMessage": null
    }
  }
]
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
result	Posted Invoice Write-Off []	Details of the invoices for which the write-off process is initiated.	Big, 64.0	64.0

Posted Invoice Write-Off

Output representation of the details of a posted invoice that's written off.

JSON example

```

{
  "result": [
    {
      "requestIdentifier": null,
      "invoiceId": "3t00000000CwAGI",
      "success": false,
      "errors": {
        "errorCode": "INVALID_API_INPUT",
        "errorMessage": "Reason is missing"
      }
    },
    {
      "requestIdentifier": 37612787,
      "invoiceId": "3t00000000CwAAI",
      "success": true,
      "errors": {
        "errorCode": null,
        "errorMessage": null
      }
    }
  ]
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
errors	Posted Invoice Write-Off Error []	If the request fails, this property contains a list of errors.	Small, 64.0	64.0
invoiceId	String	ID of the invoice record that's written off.	Big, 64.0	64.0
request Identifier	String	If the request is successful, this property contains an asynchronous API request identifier for an invoice ID.	Big, 64.0	64.0
success	Boolean	Indicates whether the invoice write-off request was successful (<code>true</code>) or not (<code>false</code>).	Big, 64.0	64.0

Posted Invoice Write-Off Error

Output representation of the error response that's associated with a request to write off a posted invoice.

JSON example

```
{
  "errors": {
    "errorCode": "INVALID_API_INPUT",
    "errorMessage": "Reason is missing"
  }
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
errorCode	String	Code that represents the error.	Small, 64.0	64.0
errorMessage	String	Message that describes the error.	Small, 64.0	64.0

Reference Line Error

Output representation of the details of the line level errors.

JSON example

If the API request fails, the `referenceLineErrorResults` property contains a list of errors grouped by the invoice line IDs.

```
[
  {
    "referenceLineId": "5TV9A000007x2gz",
    "errors": [
      {
        "errorCode": "INVALID_INPUT",
        "message": "Invalid invoice line id"
      }
    ]
  }
]
```

```

    }
  ]

```

Property Name	Type	Description	Filter Group and Version	Available Version
errors	Error Response	List of errors with error code and error message for the specified invoice line ID.	Big, 62.0	62.0
reference LineId	String	ID of the invoice line specified in the API request that has an issue, causing the API request to fail.	Small, 62.0	62.0

Refund Line Applied Response

Output representation of the details of an applied refund. This representation includes the properties of a refund line, such as the date when the refund is applied against a payment and ID of the refund line record.

JSON example

```

{
  "appliedDate": "2020-08-11T08:09:01.000Z",
  "id": "0dRR000000000CsMAI"
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
appliedDate	String	Date when the refund is applied against a payment.	Big, 64.0	64.0
id	String	ID of the refund line record.	Big, 64.0	64.0

Revenue Async Line Level

Output representation of the result of the API request for the async line level operations.

JSON example

```

{
  "success": true,
  "requestIdentifier": "237e9877-e79b-12d4-a765-321741963000",
  "errors": []
}

```

If the API request fails, the `referenceLineErrorResults` property contains a list of errors grouped by the invoice line IDs.

```

[
  {
    "referenceLineId": "5TV9A000007x2gz",
    "errors": [
      {

```

```

      "errorCode": "INVALID_INPUT",
      "message": "Invalid invoice line id"
    }
  ]
}
]

```

Property Name	Type	Description	Filter Group and Version	Available Version
errors	Error Response	Details of errors, if any.	Big, 62.0	62.0
referenceLine ErrorResults	Reference Line Error[]	List of errors grouped by the invoice line IDs if the API request fails.	Big, 62.0	62.0
referenceLine Type	String	Reference type for the reference line entity in the <code>referenceLineErrorResults</code> property.	Big, 62.0	62.0
request Identifier	String	Unique identifier of the request.	Big, 62.0	62.0
statusURL	String	URL to track the status of the operation.	Big, 62.0	62.0
success	Boolean	Indicates whether the API request is successful (<code>true</code>) or not (<code>false</code>).	Big, 62.0	62.0

Revenue Async Response

Output representation of the result of the API request with the request identifier.

JSON example

```

{
  "errors": null,
  "requestIdentifier": "ae6f23bc-f056-44b7-aa4d-c7f6fc5e0cf4",
  "success": true
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
errors	Error Response	Details of errors, if any.	Big, 62.0	62.0
request Identifier	String	Unique identifier of the request.	Big, 62.0	62.0
success	Boolean	Indicates whether the API request is successful (<code>true</code>) or not (<code>false</code>).	Big, 62.0	62.0

Send Email Error

Output representation of the error response of the API request to send emails for posted invoices.

JSON example

This example shows a sample response with an error scenario.

```
{
  "errors": [
    {
      "errorCode": "INVALID_API_INPUT",
      "errorMessage": "Specify a valid invoiceBatchRunId."
    }
  ],
  "requestIdentifier": "5IRxx0000004CKKGA2",
  "success": false
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
errorCode	String	Unique code for the error.	Big, 65.0	65.0
errorMessage	String	Descriptive message for the error.	Big, 65.0	65.0

Send Email Response

Output representation of the API request to send emails for posted invoices.

JSON example

This example shows a sample response when the request is successful.

```
{
  "errors": [],
  "requestIdentifier": "5IRLT000001SIJB4A4",
  "success": true
}
```

This example shows a sample response with an error scenario.

```
{
  "errors": [
    {
      "errorCode": "INVALID_API_INPUT",
      "errorMessage": "Specify a valid invoiceBatchRunId."
    }
  ],
  "requestIdentifier": "5IRxx0000004CKKGA2",
  "success": false
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
errors	Send Email Error []	List of errors that occurred while trying to enqueue the request. In case of errors while sending emails, you can check the Revenue Transaction Error Logs of the InvoiceBatchRun record and associated Invoice record. An error occurs for these scenarios. <ul style="list-style-type: none"> The contact email or user isn't configured. The configured email template isn't valid. Email is sent through a contact email, and the contact doesn't have an associated user. In this scenario, the emails are counted against the general email limits. An error is thrown if you exceed the email limits. 	Big, 65.0	65.0
requestIdentifier	String	Unique identifier for the request, which corresponds to the invoice batch run ID.	Big, 65.0	65.0
success	Boolean	Indicates whether the request to start the email sending process was successfully enqueued (<code>true</code>) or not (<code>false</code>).	Big, 65.0	65.0

Sequence Error

Output representation of the error response that's associated with a request to create or update a sequence policy, or assign sequences.

JSON example

This example shows a sample error response.

```
{
  "error": {
    "errorCode": "INVALID_INPUT",
    "message": "Specify a valid selectionLogic."
  },
  "isSuccess": false,
  "sequencePolicyId": null
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
errorCode	String	Code for the resultant error.	Big, 65.0	65.0
message	String	Error message for the resultant error.	Big, 65.0	65.0

Sequence Gap Reconciliation Error

Output representation of the errors encountered during the processing of the API request.

JSON example

This example shows a sample error response.

```
{
  "jobId": "",
  "sequencePolicyIds": [
    "1vdx0000000abc",
    "1vdx0000000def"
  ],
  "targetObjects": [
    "Invoice"
  ],
  "status": "NotSubmitted",
  "submittedAt": "",
  "error": {
    "errorCode": "INVALID_INPUT",
    "message": "Specify a value for either sequencePolicyIds or targetObjects."
  }
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
errorCode	String	Code for the resultant error.	Big, 65.0	65.0
errorMessage	String	Error message for the resultant error.	Big, 65.0	65.0

Sequence Gap Reconciliation

Output representation of the details of the sequence gap reconciliation.

JSON example

This example shows a sample successful response.

```
{
  "jobId": "0B1xx0000006P12",
  "sequencePolicyIds": [
    "1vdx0000000uyr",
    "1vdx0000000lrf"
  ],
  "targetObjects": [
    "Invoice"
  ],
  "status": "Submitted",
  "submittedAt": "2025-06-05T09:12:28Z",
  "error": {}
}
```

This example shows a sample error response for an invalid input.

```
{
  "jobId": "",
  "sequencePolicyIds": [
    "1vdx0000000abc",
    "1vdx0000000def"
  ],
  "targetObjects": [
    "Invoice"
  ],
  "status": "NotSubmitted",
  "submittedAt": "",
  "error": {
    "errorCode": "INVALID_INPUT",
    "message": "Missing required field in the request."
  }
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
error	Sequence Gap Reconciliation Error []	List of errors encountered during the processing of the API request.	Big, 65.0	65.0
jobId	String	Unique identifier assigned to the sequence gap reconciliation asynchronous process.	Big, 65.0	65.0
sequencePolicyIds	String[]	List of IDs of the sequence policies.	Big, 65.0	65.0
status	String	Status of the sequence gap reconciliation API request. Valid values are: <ul style="list-style-type: none"> Submitted NotSubmitted 	Big, 65.0	65.0
submittedAt	String	Date and time when the reconciliation request was submitted to the async job.	Big, 65.0	65.0
targetObjects	String[]	List of objects to which the policies are applied.	Big, 65.0	65.0

Sequence Policy

Output representation that shows the status of the assigned sequence pattern values.

JSON example

This example shows a sample successful response.

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



```

"sequencePolicyId": "1Vdxx0000000GRNAA2"
}

```

This example shows a sample error response.

```

{
  "error": {
    "errorCode": "INVALID_INPUT",
    "message": "Specify a valid selectionLogic."
  },
  "isSuccess": false,
  "sequencePolicyId": null
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
error	Sequence Error[]	Details of any error that encountered during the processing of the API request.	Big, 65.0	65.0
isSuccess	Boolean	Indicates whether the sequence policy is generated (<code>true</code>) or not (<code>false</code>).	Big, 65.0	65.0
sequencePolicyId	String	ID of the sequence policy.	Big, 65.0	65.0

Sequences Assignment

Output representation with the status of the assigned sequence pattern values.

JSON example

This example shows a sample successful response.

```

{
  "errors": null,
  "sequencesAssignment": [
    {
      "errors": null,
      "isSuccess": true,
      "sequencePatternValue": "INV-1234-2025-04-12-001",
      "targetObjectId": "3ttxx000000085dAAA"
    }
  ],
  "status": "Success"
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
errors	Sequence Error[]	Error encountered during the processing of the API request.	Big, 65.0	65.0
sequencesAssignment	Sequences Assignment Result[]	Details of the sequence pattern values assignment.	Big, 65.0	65.0

Property Name	Type	Description	Filter Group and Version	Available Version
status	String	Status of the sequence policy assignment. Valid values are: <ul style="list-style-type: none"> PartialSuccess Success Failed 	Big, 65.0	65.0

Sequences Assignment Result

Output representation of the details of the assigned sequence values to target objects.

JSON example

This example shows a sample successful response.

```
{
  "errors": null,
  "sequencesAssignment": [
    {
      "errors": null,
      "isSuccess": true,
      "sequencePatternValue": "INV-1234-2025-04-12-001",
      "targetObjectId": "3ttxx000000085dAAA"
    }
  ],
  "status": "Success"
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
errors	Sequence Error []	Error encountered during the processing of the API request.	Big, 65.0	65.0
isSuccess	Boolean	Indicates whether the sequence pattern value is assigned (<code>true</code>) or not (<code>false</code>).	Big, 65.0	65.0
sequencePatternValue	String	Sequence pattern value assigned to the target object.	Big, 65.0	65.0
sequencePolicyId	String	ID of the sequence policy assigned to the target object.	Big, 65.0	65.0
targetObjectId	String	Record to which the sequence pattern value is assigned.	Big, 65.0	65.0

Suspend Resume Billing

Output representation of the list of accounts and billing schedule groups, which are suspended or resumed for billing operations.

JSON example

```

{
  "result":{
    {
      "referenceId": "001DU000001o2UwYAI",
      "success": true,
      "errorCode": null,
      "errorMessage":null
    },
    {
      "referenceId": "001DU000001o2UuYAI",
      "success": false,
      "errorCode": "INVALID_API_INPUT",
      "errorMessage":"Billing is already suspended for 9Wsxx000000006TCAQ."
    }
  }
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
result	Suspend Resume Billing Object []	Details of the accounts or billing schedule groups that the suspend or resume billing request is initiated for.	Big, 63.0	63.0

Suspend Resume Billing Object

Output representation of the details of accounts and billing schedule groups, which are suspended or resumed for billing operations, along with the status of the API request.

JSON example

```

{
  "result":{
    {
      "referenceId": "1",
      "isSuccess": true,
      "errorCode": null,
      "errorMessage":null
    }
  }
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
errorCode	String	Code indicating the type of error.	Big, 63.0	63.0
errorMessage	String	Message stating the reason for the error, if any.	Big, 63.0	63.0

Property Name	Type	Description	Filter Group and Version	Available Version
isSuccess	Boolean	Indicates whether the API request is successful (<code>true</code>) or not (<code>false</code>).	Big, 63.0	63.0
referenceId	String	ID of the account or billing schedule group that the suspend or resume billing request is initiated for.	Big, 63.0	63.0

Tax Amount Details

Output representation of the details of the tax amount.

JSON example

```
{
  "exemptAmount": 0.0,
  "taxAmount": 12.5,
  "totalAmount": 100.0,
  "totalAmountWithTax": 112.5
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
exemptAmount	Double	Amount exempted from taxation.	Big, 62.0	62.0
taxAmount	Double	Tax amount applicable to the transaction.	Big, 62.0	62.0
totalAmount	Double	Total amount without tax.	Big, 62.0	62.0
totalAmountWithTax	Double	Total amount with tax. The <code>totalAmountWithTax</code> property value is the sum of the <code>taxAmount</code> and <code>totalAmount</code> property values.	Big, 62.0	62.0

Tax Calculation

Output representation of the details of the calculated tax.

JSON example

```
{
  "referenceEntityId": "001xx000003HYEhAAO",
  "status": "Committed",
  "taxEngineLogs": [
    {
      "createdDate": "2022-03-09T10:55:38.000Z",
      "id": "311xx00000000PpAAI",
      "resultCode": "Success"
    }
  ],
}
```

```

"taxTransactionType": "Debit",
"taxType": "Actual",
"transactionDate": "2022-03-09T10:30:41.000Z",
"addresses": {
  "shipFrom": {
    "locationCode": "67890"
  },
  "shipTo": {
    "locationCode": "23456"
  },
  "soldTo": {
    "locationCode": "23456"
  }
},
"amountDetails": {
  "exemptAmount": 0.0,
  "taxAmount": 12.5,
  "totalAmount": 100.0,
  "totalAmountWithTax": 112.5
},
"currencyIsoCode": "USD",
"description": "Monthly invoice for account 001xx000003HYEhAAO",
"documentCode": "INV-003",
"effectiveDate": "2022-03-09T10:55:38.410Z",
"lineItems": [
  {
    "addresses": {
      "shipFrom": {
        "locationCode": "67890"
      },
      "shipTo": {
        "locationCode": "12345"
      },
      "soldTo": {
        "locationCode": "12345"
      }
    },
    "amountDetails": {
      "exemptAmount": 0.0,
      "taxAmount": 12.5,
      "totalAmount": 100.0,
      "totalAmountWithTax": 112.5
    },
    "effectiveDate": "2022-03-09T10:55:38.416Z",
    "lineNumber": "001xx000003HYEiAAO",
    "productCode": "Y0001",
    "quantity": 1.0,
    "taxCode": "TX0001",
    "taxes": [
      {
        "exemptAmount": 0.0,
        "exemptReason": "NoExemption",
        "imposition": {
          "type": "General"
        }
      }
    ]
  }
]

```

```

    },
    "jurisdiction": {
      "country": "US",
      "id": "63000",
      "level": "CIT",
      "name": "SEATTLE",
      "region": "WA",
      "stateAssignedNo": "1726"
    },
    "rate": 12.5,
    "tax": 12.5,
    "taxId": "11000378132466",
    "taxableAmount": 100.0
  }
]
}
]
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
adapterError	Error Response	Details of the adapter error.	Big, 62.0	62.0
addresses	Addresses	Addresses that are used for calculating tax.	Big, 62.0	62.0
amountDetails	Tax Amount Details	Details of the transaction amount and taxes.	Big, 62.0	62.0
currencyIsoCode	String	Currency ISO code that's used for tax calculation.	Big, 62.0	62.0
description	String	Description of the transaction status.	Big, 62.0	62.0
documentCode	String	Unique identifier for the tax document. If the <code>documentCode</code> property isn't specified, the tax engine auto-generates it.	Big, 62.0	62.0
effectiveDate	String	Date when the tax rules are applied.	Big, 62.0	62.0
lineItems	Line Item []	Line items that the taxes are calculated for.	Big, 62.0	62.0
reference DocumentCode	String	Reference document code. For subsequent transactions such as a credit tax, the <code>referenceDocumentCode</code> property value refers to the original document code.	Big, 62.0	62.0
reference EntityId	String	ID of the related quote, invoice, or other transaction documents.	Big, 62.0	62.0
status	String	Commit status of the tax transaction. Valid values are: <ul style="list-style-type: none"> Committed—Committed transaction, which is marked for tax reporting. 	Big, 62.0	62.0

Property Name	Type	Description	Filter Group and Version	Available Version
		<ul style="list-style-type: none"> Uncommitted— Uncommitted transaction, which isn't marked for tax reporting. 		
taxEngineLogs	Tax Engine Log []	Records that the tax engine generates while calculating taxes for the transaction.	Big, 62.0	62.0
taxTransactionId	String	Unique ID for the tax transaction.	Big, 62.0	62.0
transactionDate	String	Date of the transaction that appears on the invoice, order, and other transaction documents.	Big, 62.0	62.0
taxTransactionType	String	Tax transaction type. Valid values are: <ul style="list-style-type: none"> Debit—Increases tax liability for the user, requiring the user to pay tax on the transaction. Credit—Decreases tax liability for the user, resulting in a tax refund for the user. Void—Specifies that the tax engine has voided the document that's mentioned as the <code>referenceDocumentCode</code> property value. 	Big, 62.0	62.0
taxType	String	Type of calculated tax. Valid values are: <ul style="list-style-type: none"> Actual—Exact tax amount that's calculated based on the actual sales. Estimated— Estimated tax amount, which is adjusted later to match the actual tax calculations. 	Big, 62.0	62.0

Tax Details

Output representation of the tax details for each line item.

JSON example

```
{
  "taxes": [
    {
      "exemptAmount": 0,
      "exemptReason": "NoExemption",
      "imposition": {
        "type": "General"
      }
    }
  ]
}
```

```

    },
    "jurisdiction": {
      "country": "US",
      "id": "63000",
      "level": "CIT",
      "name": "SEATTLE",
      "region": "WA",
      "stateAssignedNo": "1726"
    },
    "rate": 12.5,
    "tax": 12.5,
    "taxId": "11000378132466",
    "taxableAmount": 100
  }
]
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
exemptAmount	Double	Amount exempted from taxation for the line item.	Big, 62.0	62.0
exemptReason	String	Reason for the tax exemption.	Big, 62.0	62.0
imposition	Tax Imposition	Tax imposition details applicable to the line item.	Big, 62.0	62.0
jurisdiction	Tax Jurisdiction	Details of the tax jurisdiction.	Big, 62.0	62.0
rate	Double	Tax rate applied to the taxable amount to calculate the tax.	Big, 62.0	62.0
tax	Double	Actual amount of tax that's applicable to the line item.	Big, 62.0	62.0
taxId	String	Unique identifier such as a code or a number that's assigned to a specific tax. This value helps users identify which type of tax is applied.	Big, 62.0	62.0
taxableAmount	Double	Total amount of the line item that's eligible for taxation.	Big, 62.0	62.0

Tax Engine Log

Output representation of the logs that the tax engine generates.

JSON example

```

{
  "taxEngineLogs": [
    {
      "createdDate": "2022-03-09T10:55:38.000Z",

```



```

    "id": "311xx00000000PpAAI",
    "resultCode": "Success"
  }
]
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
createdDate	String	Date when the tax engine creates the log.	Big, 62.0	62.0
id	String	ID of the tax engine log record.	Big, 62.0	62.0
resultCode	String	Result code associated with the created log.	Big, 62.0	62.0

Tax Imposition

Output representation of the details of the imposed tax.

JSON example

```

{
  "type": "Parish",
  "name": "Burbank"
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
name	String	Name of the tax imposition.	Big, 62.0	62.0
type	String	Type of the tax imposition.	Big, 62.0	62.0

Tax Jurisdiction

Output representation of the details of the tax jurisdiction for the tax line.

JSON example

```

{
  "country": "US",
  "id": "63000",
  "level": "CIT",
  "name": "SEATTLE",
  "region": "WA",
  "stateAssignedNo": "1726"
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
country	String	Country of the tax jurisdiction.	Big, 62.0	62.0

Property Name	Type	Description	Filter Group and Version	Available Version
id	String	ID of the tax jurisdiction.	Big, 62.0	62.0
level	String	Level of the tax jurisdiction, for example, State and Federal.	Big, 62.0	62.0
name	String	Name of the tax jurisdiction authority.	Big, 62.0	62.0
region	String	Parent region of the tax jurisdiction.	Big, 62.0	62.0
stateAssigned	String	Number of the assigned state.	Big, 62.0	62.0
No				

Billing Apex Reference

Billing provides the `ConnectApi` namespace (also called `Connect` in Apex) that contains classes for accessing the same capabilities that are available in the Billing Business APIs. Additionally, you can use other built-in Apex classes and interfaces grouped by namespace. This table lists the available Billing Apex methods with the associated Connect REST API.

Apex Method	Connect REST API
<code>convertNegativeInvoiceLines(ConvertNegativeInvoiceLinesInput, invoiceId)</code>	Negative Invoice Lines to Credit Conversion (POST)
<code>generateInvoices(inputRequest)</code>	Invoices By Using Billing Schedules (POST)
<code>recoverBillingSchedules(inputRequest)</code>	Billing Schedule Recovery List (POST)
<code>creditInvoice(CreditInvoiceInput, invoiceId)</code>	Credit Memo Create and Apply (POST)
<code>applyCreditMemos(CreditMemoApplyInput, creditMemoId)</code>	Credit Memo Apply List (POST)
<code>unapplyCreditMemos(CreditMemoUnapplyInput, creditMemoInvApplicationId)</code>	Credit Memo Unapply (POST)
<code>applyCreditMemoLines(CreditMemoLineApplyInput, creditMemoLineId)</code>	Credit Memo Line Apply (POST)
<code>unapplyCreditMemoLines(CreditMemoLineUnapplyInput, creditMemoLineInvoiceLineId)</code>	Credit Memo Line Unapply (POST)
<code>triggerInvoiceBatchDraftToPosted(invoiceBatchRunId)</code>	Invoices Batch Draft to Posted Status (POST)
<code>postDraftInvoices(inputRequest)</code>	Invoice Draft to Posted Status (POST)

Apex Method	Connect REST API
<code>createCreditMemos(CreditMemoInputRequest)</code>	Credit Memo Create and Apply (POST)
<code>voidPostedInvoice(invoiceId)</code>	Posted Invoice Voidance (POST)
<code>calculateTax(calculateTax)</code>	Tax Calculation (POST)
<code>applyPaymentLine(PaymentLineApplyInput, paymentId)</code>	Payment Line Apply (POST)
<code>unapplyPaymentLine(PaymentLineUnapplyInput, paymentId, paymentLineId)</code>	Payment Line Unapply (POST)
<code>applyRefundLine(RefundLineApplyInput, refundId)</code>	Refund Line Apply (POST)
<code>reconcileSequences(sequenceGapReconciliationInputRepresentation)</code>	Sequence Gap Reconciliation (POST)
<code>sequenceAssignment(sequencesAssignmentInputRepresentation)</code>	Sequence Assignment (POST)

For more information about Apex classes that are available for Commerce Payments, see [CommercePayments Namespace](#).

[ConnectApi Namespace](#)

The `ConnectApi` namespace (also called Connect in Apex) provides classes to manage credit applications and billing scenarios.

[InvoiceWriteOff Namespace](#)

Create credit memos with the total charge amount on the invoice as the write-off amount and close the invoice.

[TaxEngineAdapter Interface](#)

Retrieves and evaluates the details from a tax engine to define tax details.

ConnectApi Namespace

The `ConnectApi` namespace (also called Connect in Apex) provides classes to manage credit applications and billing scenarios.

These classes are available in the `ConnectApi` namespace.

[BatchInvoiceApplication Class](#)

Update a batch of invoices from Draft to Posted status for a credit memo application. by using the `BatchInvoiceApplication` class.

[Billing Class](#)

Manage billing scenarios by using the `Billing` class. You can convert negative invoice lines, create and apply a credit memo to an invoice, generate invoices, and recover billing schedules.

[CreditMemoApply Class](#)

Manage credit memo applications by using the `CreditMemoApply` class.

[CreditMemoLineApply Class](#)

Manage credit memo line applications by using the `CreditMemoLineApply` class.

[HarmonizeBilling Class](#)

Update the status of the invoice from Draft to Posted by using the `HarmonizeBilling` class.

[PaymentsBilling Class](#)

Use the PaymentsBilling class to allocate the balance of a payment to reduce the balance of an invoice. Additionally, revert the application of a payment line from an invoice.

[SequencingWithoutAura Class](#)

Manage invoice sequencing processes by using the SequencingWithoutAura class.

[ConnectApi Input Classes](#)

Billing includes these Apex input classes.

[ConnectApi Output Classes](#)

Billing includes these Apex output classes.

[ConnectApi Enums](#)

Enums specific to the ConnectApi namespace.

BatchInvoiceApplication Class

Update a batch of invoices from Draft to Posted status for a credit memo application. by using the BatchInvoiceApplication class.

Namespace

ConnectApi

BatchInvoiceApplication Methods

These methods are for BatchInvoiceApplication. All methods are static.

[triggerInvoiceBatchDraftToPosted\(invoiceBatchRunId\)](#)

Update a batch of invoices from Draft to Posted status for a credit memo application.

triggerInvoiceBatchDraftToPosted (invoiceBatchRunId)

Update a batch of invoices from Draft to Posted status for a credit memo application.

API Version

62.0

Requires Chatter

No

Signature

```
public static ConnectApi.InvoiceBatchDraftToPostedResult  
triggerInvoiceBatchDraftToPosted (String invoiceBatchRunId)
```

Parameters

invoiceBatchRunId

Type: String

ID of the invoice batch run record that creates the draft invoices.

Return Value

Type: [ConnectApi.InvoiceBatchDraftToPostedResult](#) on page 2128

Usage

You need the Billing Operations User permission set to use this method.

This method posts the draft invoices and changes the status of the invoices from `Draft` to `Posted`.

Billing Class

Manage billing scenarios by using the Billing class. You can convert negative invoice lines, create and apply a credit memo to an invoice, generate invoices, and recover billing schedules.

Namespace

ConnectApi

Billing Methods

These methods are for `Billing`. All methods are static.

[convertNegativeInvoiceLines\(ConvertNegativeInvoiceLinesInput, invoiceId\)](#)

Convert a list of invoice lines with a negative amount into a posted credit memo. This conversion is applicable for a single invoice at a time.

[createCreditMemos\(CreditMemoInputRequest\)](#)

Create a credit memo without applying it to an invoice. You can credit the invoice at a later date.

[creditInvoice\(CreditInvoiceInput, invoiceId\)](#)

Create a credit memo and apply it to an invoice. The credit memo can fully or partially credit the invoice.

[generateInvoices\(inputRequest\)](#)

Create an invoice from a billing schedule.

[recoverBillingSchedules\(inputRequest\)](#)

Recover the latest generated invoice associated with the billing schedules in the Error or Processing status.

[voidPostedInvoice\(invoiceId\)](#)

Void a posted invoice to rebill the customer, if necessary.

convertNegativeInvoiceLines (ConvertNegativeInvoiceLinesInput, invoiceId)

Convert a list of invoice lines with a negative amount into a posted credit memo. This conversion is applicable for a single invoice at a time.

API Version

62.0

Requires Chatter

No

Signature

```
public static ConnectApi.ConvertNegativeInvoiceLinesResult
convertNegativeInvoiceLines (ConnectApi.ConvertNegativeInvoiceLinesInputRequest
ConvertNegativeInvoiceLinesInput, String invoiceId)
```

```
ConnectApi.Billing, convertNegativeInvoiceLines,
[ConnectApi.ConvertNegativeInvoiceLinesInputRequest, String],
ConnectApi.ConvertNegativeInvoiceLinesResult
```

Parameters

ConvertNegativeInvoiceLinesInput

Type: [ConnectApi.ConvertNegativeInvoiceLinesInputRequest](#) on page 2115

Input parameters to convert a negative invoice line to a credit.

invoiceId

Type: String

ID of the invoice whose negative invoice lines must be converted.

Return Value

Type: [ConnectApi.ConvertNegativeInvoiceLinesResult](#) on page 2128

Usage

You need the Credit Memo Operations User permission set to use this method.

Keep these considerations in mind when you use this method.

- All invoice lines must be related to the same invoice.
- The invoice line must have a negative amount.
- The invoice line must not be a previously converted credit memo.
- The invoice must have the `Posted` status.
- The invoice must not have any active settlements such as credit applications.

createCreditMemos (CreditMemoInputRequest)

Create a credit memo without applying it to an invoice. You can credit the invoice at a later date.

API Version

62.0

Requires Chatter

No

Signature

```
public static ConnectApi.RevenueAsyncRepresentation
createCreditMemos (ConnectApi.StandaloneCreditMemoInputRequest CreditMemoInputRequest)
```

Parameters

CreditMemoInputRequest

Type: [ConnectApi.StandaloneCreditMemoInputRequest](#) on page 2124

Input representation of the details required to create a standalone credit memo.

Return Value

Type: [ConnectApi.RevenueAsyncRepresentation](#) on page 2130

Usage

You need the Credit Memo Operations User permission set to use this method.

Specify the credit memo header information, charge parameters, adjustment parameters, and tax parameters. A credit memo requires at least one credit memo line. The credit memo line can be a charge or an adjustment.

Specify the credit memo lines that you want as lists of charges and adjustments. Each credit memo line must be related to a product.

creditInvoice (CreditInvoiceInput, invoiceId)

Create a credit memo and apply it to an invoice. The credit memo can fully or partially credit the invoice.

API Version

62.0

Requires Chatter

No

Signature

```
public static ConnectApi.RevenueAsyncLineLevelOutputResponse
creditInvoice (ConnectApi.CreditInvoiceInputRequest CreditInvoiceInput, String invoiceId)
```

```
ConnectApi.Billing, creditInvoice, [ConnectApi.CreditInvoiceInputRequest, String],
ConnectApi.RevenueAsyncLineLevelOutputResponse
```

Parameters

CreditInvoiceInput

Type: [ConnectApi.CreditInvoiceInputRequest](#) on page 2116

Input representation of the details of the request to create a credit memo.

invoiceId

Type: String

ID of the invoice to be credited partially or fully. The status of the invoice must be `Posted`.

Return Value

Type: [ConnectApi.RevenueAsyncLineLevelOutputResponse](#) on page 2130

Usage

Use this method to adjust an outstanding invoice balance or rectify errors in an invoice. Pass a list of invoice lines to credit. Keep these considerations in mind when you use this API.

- The request must contain at least one invoice line. Each invoice line must have the invoice line's ID, the amount to credit, and any optional tax details. The invoice lines must be a part of the invoice passed in the resource.
- The amount to credit must not exceed the charge or adjustment amount of an individual invoice line.
- The request body's credit amount inclusive of taxes must not exceed the target invoice line's amount inclusive of taxes, except for taxes calculated through an external tax service.
- The request body's total credit amount inclusive of taxes calculated through an external tax service must not exceed the outstanding invoice balance, which is also inclusive of taxes.

This method creates and posts a credit memo. The credit memo has one credit memo line for each invoice line passed in the API request. The invoice's balance is then reduced by a value equal to the credit memo's balance. This API modifies the balance of a posted invoice or invoice line based on the specified credit application level for your org. See [Apply Credits to Posted Invoices or Invoice Lines](#).

generateInvoices (inputRequest)

Create an invoice from a billing schedule.

API Version

62.0

Requires Chatter

No

Signature

```
public static ConnectApi.RevenueAsyncRepresentation
generateInvoices (ConnectApi.InvoiceInputRepresentation inputRequest)
```

```
ConnectApi.Billing, generateInvoices, [ConnectApi.InvoiceInputRepresentation],
ConnectApi.RevenueAsyncRepresentation
```

Parameters

inputRequest

Type: [ConnectApi.InvoiceInputRepresentation](#) on page 2120

Input representation of the details of the billing schedule.

Return Value

Type: [ConnectApi.RevenueAsyncRepresentation](#) on page 2130

Usage

You need the Generate Invoices From Billing Schedule API permission set to use this method.

This method creates one billing period item for each unbilled period between the billing schedule's next billing date and the invoice's target date. Additionally, one invoice line is created for each billing period item. This method creates up to six billing periods per request.

recoverBillingSchedules (inputRequest)

Recover the latest generated invoice associated with the billing schedules in the Error or Processing status.

API Version

62.0

Requires Chatter

No

Signature

```
public static ConnectApi.BillingScheduleRecoveryResults  
recoverBillingSchedules (ConnectApi.BillingScheduleRecoveryInputRequest inputRequest)
```

```
ConnectApi.Billing, recoverBillingSchedules,  
[ConnectApi.BillingScheduleRecoveryInputRequest], ConnectApi.BillingScheduleRecoveryResults
```

Parameters

inputRequest

Type: [ConnectApi.BillingScheduleRecoveryInputRequest](#) on page 2115

Input representation of the details of the billing schedules to recover the associated invoice.

Return Value

Type: [ConnectApi.BillingScheduleRecoveryResults](#) on page 2127

Usage

You need the Manage Errors Using Invoice Error Recovery API permission set to use this method.

Billing schedules include critical details such as the amount to be billed, next billing date, and status. An invoice can be associated with one or more billing schedules. When an invoice is generated or posted, the billing schedules are updated to reflect the accurate state of the invoice. The billing schedules associated with an invoice are marked in the `ERROR` status if any of the invoicing processes have errors. Use this method to recover the invoice associated with the billing schedules in the `ERROR` or `PROCESSING` status.

voidPostedInvoice (invoiceId)

Void a posted invoice to rebill the customer, if necessary.

API Version

62.0

Requires Chatter

No

Signature

```
public static ConnectApi.RevenueAsyncRepresentation voidPostedInvoice(String invoiceId)
```

Parameters

invoiceId

Type: String

ID of the posted invoice to be voided.

Return Value

Type: [ConnectApi.RevenueAsyncRepresentation](#) on page 2130

Usage

You need the Void a Posted Invoice API permission set to use this method.

This method changes the invoice status from `Posted` to `Void In Progress`. The invoice remains in the `Void In Progress` status until the credit is applied and financial fields are recalculated on the invoice's related billing period items and billing schedule. The invoice status changes to `Voided` after all recalculations are completed.

Keep these considerations in mind when you use this method.

- The balance and total amount on the invoice must be equal. If these amounts aren't equal due to payments or credits, the API request fails.
- You can't call other APIs on an invoice with the `Void In Progress` status. You also can't update the invoice fields.
- You can void only the most recently posted invoice on a billing schedule.
- To void an invoice that has payments or credits, use the [Credit Memo Unapply \(POST\)](#) API.

Credit Memos

The void process creates a credit memo, which contains one credit memo line for each invoice line, including tax lines. For example, if the invoice line has a balance of US\$20, the related credit memo line has a balance of \$20. The credit memo's balance is then allocated to the invoice header's balance, reducing it to zero. A credit memo invoice application is created to record the details of the void process.

Negative Invoice Lines

If an invoice has negative invoice lines that aren't converted to a credit memo, you can use this endpoint to void the posted invoice.

CreditMemoApply Class

Manage credit memo applications by using the `CreditMemoApply` class.

Namespace

ConnectApi

CreditMemoApply Methods

These methods are for `CreditMemoApply`. All methods are static.

[applyCreditMemos\(CreditMemoApplyInput, creditMemoId\)](#)

Adjust or correct already issued invoices by applying an existing credit memo to an invoice.

[unapplyCreditMemos\(CreditMemoUnapplyInput, creditMemoInvApplicationId\)](#)

Unapply a credit memo from an invoice and return the invoice and the credit memo to their pre-application states.

applyCreditMemos (CreditMemoApplyInput, creditMemoId)

Adjust or correct already issued invoices by applying an existing credit memo to an invoice.

API Version

62.0

Requires Chatter

No

Signature

```
public static ConnectApi.ApplyCreditResults  
applyCreditMemos (ConnectApi.CreditMemoApplyInputRequest CreditMemoApplyInput, String  
creditMemoId)
```

Parameters

CreditMemoApplyInput

Type: [ConnectApi.CreditMemoApplyInputRequest](#) on page 2119

Input representation of the request to apply a credit memo to an invoice.

creditMemoId

Type: String

ID of the credit memo record.

Return Value

Type: [ConnectApi.ApplyCreditResults](#) on page 2127

Usage

Specify the credit memo ID and the amounts to be applied, with the total of all applied amounts not exceeding the credit memo's balance.

The credit amount for each invoice can't surpass the original charge or adjustment amount, and the overall credit amount must not exceed the invoice's outstanding balance. The exceptions include any taxes calculated by an external service.

For example, your organization sold 10 tablets at US\$500 each, totaling \$5000, to a vendor who later reported that 6 tablets were defective. Using this method, your accounts receivable team creates a \$3000 credit memo and applies this credit to the original invoice.

unapplyCreditMemos (CreditMemoUnapplyInput, creditMemoInvApplicationId)

Unapply a credit memo from an invoice and return the invoice and the credit memo to their pre-application states.

API Version

62.0

Requires Chatter

No

Signature

```
public static ConnectApi.UnapplyCreditResult
unapplyCreditMemos (ConnectApi.CreditMemoUnapplyInputRequest CreditMemoUnapplyInput,
String creditMemoInvApplicationId)
```

Parameters

CreditMemoUnapplyInput

Type: [ConnectApi.CreditMemoUnapplyInputRequest](#) on page 2119

Input representation of the request to unapply a credit memo from an invoice.

creditMemoInvApplicationId

Type: String

ID of the credit memo invoice application.

Return Value

Type: [ConnectApi.UnapplyCreditResult](#) on page 2132

Usage

Use this method if an error occurred when a credit is issued. For example, if an incorrect credit memo is applied to an invoice, or if a credit memo is created for an incorrect amount, use this method to unapply the credit memo.

CreditMemoLineApply Class

Manage credit memo line applications by using the `CreditMemoLineApply` class.

Namespace

ConnectApi

CreditMemoLineApply Methods

These methods are for `CreditMemoLineApply`. All methods are static.

[applyCreditMemoLines\(CreditMemoLineApplyInput, creditMemoLineId\)](#)

Adjust or correct already issued invoices by applying an existing credit memo line to an invoice line.

[unapplyCreditMemoLines\(CreditMemoLineUnapplyInput, creditMemoLineInvoiceLineId\)](#)

Unapply a credit memo line from an invoice line and return the invoice line and the credit memo line to their pre-application states.

applyCreditMemoLines(CreditMemoLineApplyInput, creditMemoLineId)

Adjust or correct already issued invoices by applying an existing credit memo line to an invoice line.

API Version

62.0

Requires Chatter

No

Signature

```
public static ConnectApi.CreditMemoLineAppliedResponse
applyCreditMemoLines(ConnectApi.CreditMemoLineApplyInput CreditMemoLineApplyInput,
String creditMemoLineId)
```

Parameters

CreditMemoLineApplyInput

Type: [ConnectApi.CreditMemoLineApplyInput](#) on page 2119

Input representation of the details of the request to apply a credit memo line to an invoice line.

creditMemoLineId

Type: String

ID of the credit memo line record.

Return Value

Type: [ConnectApi.CreditMemoLineAppliedResponse](#) on page 2127

Usage

You need the Credit Memo Operations User permission set to use this method.

unapplyCreditMemoLines (CreditMemoLineUnapplyInput, creditMemoLineInvoiceLineId)

Unapply a credit memo line from an invoice line and return the invoice line and the credit memo line to their pre-application states.

API Version

62.0

Requires Chatter

No

Signature

```
public static ConnectApi.CreditMemoLineUnappliedResponse
unapplyCreditMemoLines (ConnectApi.CreditMemoLineUnapplyInput CreditMemoLineUnapplyInput,
String creditMemoLineInvoiceLineId)
```

Parameters

CreditMemoLineUnapplyInput

Type: [ConnectApi.CreditMemoLineUnapplyInput](#) on page 2119

Input representation of the details of the request to unapply a credit memo line from an invoice line.

creditMemoLineInvoiceLineId

Type: String

ID of the credit memo line invoice line record.

Return Value

Type: [ConnectApi.CreditMemoLineUnappliedResponse](#) on page 2128

Usage

You need the Credit Memo Operations User permission set to use this method.

HarmonizeBilling Class

Update the status of the invoice from Draft to Posted by using the HarmonizeBilling class.

Namespace

ConnectApi

HarmonizeBilling Methods

These methods are for `HarmonizeBilling`. All methods are static.

[postDraftInvoices\(inputRequest\)](#)

Update the status of the invoice from Draft to Posted.

postDraftInvoices (inputRequest)

Update the status of the invoice from Draft to Posted.

API Version

62.0

Requires Chatter

No

Signature

```
public static ConnectApi.RevenueAsyncRepresentation  
postDraftInvoices (ConnectApi.InvoiceDraftToPostedInputRequest inputRequest)
```

Parameters

inputRequest

Type: [ConnectApi.InvoiceDraftToPostedInputRequest](#) on page 2120

Input representation of the details of the draft invoice that's posted.

Return Value

Type: [ConnectApi.RevenueAsyncRepresentation](#) on page 2130

Usage

You need the Billing Operations User permission set to use this method.

This method calls an external tax engine to calculate taxes for the draft invoice, posts the invoice, and updates the related billing schedules and billing periods.

PaymentsBilling Class

Use the PaymentsBilling class to allocate the balance of a payment to reduce the balance of an invoice. Additionally, revert the application of a payment line from an invoice.

Namespace

ConnectApi

PaymentsBilling Methods

These methods are for `PaymentsBilling`. All methods are static.

[applyPaymentLine\(PaymentLineApplyInput, paymentId\)](#)

Allocate the balance of a payment to reduce the balance of an invoice. The response includes an ID of the payment line invoice that represents the payment balance allocated against the invoice.

[applyRefundLine\(RefundLineApplyInput, refundId\)](#)

Make a refund transaction against a payment.

[unapplyPaymentLine\(PaymentLineUnapplyInput, paymentId, paymentLineId\)](#)

Revert the application of a payment line from an invoice, and return the payment and invoices to their pre-application state. Use this method if you need to correct an input during the payment application process.

[unapplyPaymentLine\(PaymentLineUnapplyInput, paymentLineId\)](#)

Revert the application of a payment line from an invoice, and return the payment and invoices to their pre-application state. Use this method if you need to correct an input during the payment application process.

applyPaymentLine (PaymentLineApplyInput, paymentId)

Allocate the balance of a payment to reduce the balance of an invoice. The response includes an ID of the payment line invoice that represents the payment balance allocated against the invoice.

API Version

64.0

Requires Chatter

No

Signature

```
public static ConnectApi.PaymentLineApplyResponse
applyPaymentLine (ConnectApi.PaymentLineApplyRequest PaymentLineApplyInput, String
paymentId)
```

Parameters

PaymentLineApplyInput

Type: [ConnectApi.PaymentLineApplyRequest](#) on page 2121

Input representation of the payment line details.

paymentId

Type: String

ID of the payment record.

Return Value

Type: [ConnectApi.PaymentLineApplyResponse](#) on page 2129

Usage

Use the Commerce Payments APIs to send your payment and refund details to external payment gateways for processing against a customer's bank. See [Commerce Payments resources](#) to check the APIs for payment gateways, payment captures, and payment authorizations.

applyRefundLine (RefundLineApplyInput, refundId)

Make a refund transaction against a payment.

API Version

64.0

Requires Chatter

No

Signature

```
public static ConnectApi.RefundLineApplyResponse  
applyRefundLine (ConnectApi.RefundLineApplyRequest RefundLineApplyInput, String refundId)
```

Parameters

RefundLineApplyInput

Type: [ConnectApi.RefundLineApplyRequest](#) on page 2122

Input representation of the details of a transaction refund request. This representation outlines the properties of a refund, including the refund amount and ID of the payment or credit memo record that the refund is applied to.

refundId

Type: String

ID of the refund record.

Return Value

Type: [ConnectApi.RefundLineApplyResponse](#) on page 2130

unapplyPaymentLine (PaymentLineUnapplyInput, paymentId, paymentLineId)

Revert the application of a payment line from an invoice, and return the payment and invoices to their pre-application state. Use this method if you need to correct an input during the payment application process.

API Version

64.0

Requires Chatter

No

Signature

```
public static ConnectApi.PaymentLineUnapplyResponse  
unapplyPaymentLine (ConnectApi.PaymentLineUnapplyRequest PaymentLineUnapplyInput, String  
paymentId, String paymentLineId)
```

Parameters

PaymentLineUnapplyInput

Type: [ConnectApi.PaymentLineUnapplyRequest](#) on page 2121

Input representation of the payment line details.

paymentId

Type: String

ID of the payment record.

paymentLineId

Type: String

ID of the payment line record.

Return Value

Type: [ConnectApi.PaymentLineUnapplyResponse](#) on page 2129

Usage

Use the Commerce Payments APIs to send your payment and refund details to external payment gateways for processing against a customer's bank. See [Commerce Payments resources](#) to check the APIs for payment gateways, payment captures, and payment authorizations.

unapplyPaymentLine (PaymentLineUnapplyInput, paymentLineId)

Revert the application of a payment line from an invoice, and return the payment and invoices to their pre-application state. Use this method if you need to correct an input during the payment application process.

API Version

64.0

Requires Chatter

No

Signature

```
public static ConnectApi.PaymentLineUnapplyResponse
unapplyPaymentLine (ConnectApi.PaymentLineUnapplyRequest PaymentLineUnapplyInput, String
paymentLineId)
```

Parameters

PaymentLineUnapplyInput

Type: [ConnectApi.PaymentLineUnapplyRequest](#) on page 2121

Input representation of the payment line details.

paymentLineId

Type: String

ID of the payment line record.

Return Value

Type: [ConnectApi.PaymentLineUnapplyResponse](#) on page 2129

Usage

Use the Commerce Payments APIs to send your payment and refund details to external payment gateways for processing against a customer's bank. See [Commerce Payments resources](#) to check the APIs for payment gateways, payment captures, and payment authorizations.

SequencingWithoutAura Class

Manage invoice sequencing processes by using the SequencingWithoutAura class.

Namespace

ConnectApi

SequencingWithoutAura Methods

These methods are for `SequencingWithoutAura`. All methods are static.

[reconcileSequences\(sequenceGapReconciliationInputRepresentation\)](#)

Restore a missing sequence value identified by using this API in gapless-enabled sequences. This sequence value can be used later in the subsequent sequence policy numbering, ensuring there are no gaps.

[sequenceAssignment\(sequencesAssignmentInputRepresentation\)](#)

Assign sequence pattern values to objects based on the configured sequence policy.

reconcileSequences (sequenceGapReconciliationInputRepresentation)

Restore a missing sequence value identified by using this API in gapless-enabled sequences. This sequence value can be used later in the subsequent sequence policy numbering, ensuring there are no gaps.

API Version

65.0

Requires Chatter

No

Signature

```
public static ConnectApi.sequenceGapReconciliationOutputRepresentation  
reconcileSequences (ConnectApi.sequenceGapReconciliationInputRepresentation  
sequenceGapReconciliationInputRepresentation)
```

Parameters

sequenceGapReconciliationInputRepresentation

Type: [ConnectApi.SequenceGapReconciliationInputRepresentation](#) on page 2122

The details of the input used to identify and reconcile gaps in sequence values based on the sequence policy or target object.

Return Value

Type: [ConnectApi.SequenceGapReconciliationOutputRepresentation](#) on page 2131

Usage

You need the Billing Admin permission set to use this method.

sequenceAssignment (sequencesAssignmentInputRepresentation)

Assign sequence pattern values to objects based on the configured sequence policy.

API Version

65.0

Requires Chatter

No

Signature

```
public static ConnectApi.SequencesAssignmentOutputRepresentation  
sequenceAssignment (ConnectApi.SequencesAssignmentInputRepresentation  
sequencesAssignmentInputRepresentation)
```

Parameters

sequencesAssignmentInputRepresentation

Type: [ConnectApi.SequencesAssignmentInputRepresentation](#) on page 2122

The details of the target objects to which the sequence pattern values are assigned.

Return Value

Type: [ConnectApi.SequencesAssignmentOutputRepresentation](#) on page 2132

Usage

You need the Billing Admin permission set to use this method.

ConnectApi Input Classes

Billing includes these Apex input classes.

[ConnectApi.ApplicationsRequest](#)

Connect API representation of an application item input request for credit memo apply api

[ConnectApi.BillingAddressRequest](#)

Input representation of the details of an address.

[ConnectApi.BillingScheduleRecoveryInputRepresentation](#)

Input representation of the details of the billing schedules to recover the associated invoice.

[ConnectApi.ConvertNegativeInvoiceLinesInputRequest](#)

Input representation of the request details to convert a negative invoice line into a credit.

[ConnectApi.CreditDetailsApplyInput](#)

Input representation of the request to specify one or more applications to apply a credit memo line for, with each application representing an invoice line.

[ConnectApi.CreditInvoiceInputRequest](#)

Input representation of the details of the request to create a credit memo.

[ConnectApi.CreditInvoiceInvoiceLine](#)

Input representation of the details of the invoice lines to be credited.

[ConnectApi.CreditInvoiceInvoiceLineTax](#)

Input representation of the details of the tax lines to be created manually for the invoice line.

[ConnectApi.CreditMemoAddressesInputRequest](#)

Input representation of the details of the billing and shipping addresses.

[ConnectApi.CreditMemoApplyInputRequest](#)

Input representation of the request to apply a credit memo to an invoice.

[ConnectApi.CreditMemoLineApplyInput](#)

Input representation of the details of the request to apply a credit memo line to an invoice line.

[ConnectApi.CreditMemoLineUnapplyInput](#)

Input representation of the details of the request to unapply a credit memo line from an invoice line.

[ConnectApi.CreditMemoUnapplyInputRequest](#)

Input representation of the request to unapply a credit memo from an invoice.

[ConnectApi.InvoiceDraftToPostedInputRequest](#)

Input representation of the details of the draft invoice that's posted.

[ConnectApi.InvoiceInputRepresentation](#)

Input representation of the details of the billing schedule.

[ConnectApi.PaymentLineApplyRequest](#)

Input representation of the payment line details. This representation covers details on allocation of a payment to a specific invoice line. It also provides additional context through optional fields, such as associated account and effective date.

[ConnectApi.PaymentLineUnapplyRequest](#)

Input representation of the payment line details. This representation covers fields that you can specify to revert a payment line application.

[ConnectApi.RefundLineApplyRequest](#)

Input representation of the details of a transaction refund request. This representation outlines the properties of a refund, including the refund amount and ID of the payment or credit memo record that the refund is applied to.

[ConnectApi.SequenceGapReconciliationInputRepresentation](#)

The details of the input used to identify and reconcile gaps in sequence values based on the sequence policy or target object.

[ConnectApi.SequencesAssignmentInputRepresentation](#)

The details of the target objects to which the sequence pattern values are assigned.

[ConnectApi.StandaloneCreditMemoChargeInputRequest](#)

Input representation of the details of the charge lines of a credit memo.

[ConnectApi.StandaloneCreditMemoInputRequest](#)

Input representation of the details required to create a standalone credit memo.

[ConnectApi.StandaloneCreditMemoTaxInputRequest](#)

Connect API representation of Tax input request

ConnectApi.ApplicationsRequest

Connect API representation of an application item input request for credit memo apply api

Property	Type	Description	Required or Optional	Available Version
amount	Double	Credit amount to be applied to the invoice.	Required	62.0
appliedToId	String	ID of the invoice record to apply the credit for.	Required	62.0
description	String	Explanation or reason for applying the credit memo.	Optional	62.0
effectiveDate	String	Effective date for the credit memo.	Optional	62.0

ConnectApi.BillingAddressRequest

Input representation of the details of an address.

Property	Type	Description	Required or Optional	Available Version
city	String	Address city.	Optional	62.0
country	String	Address country.	Optional	62.0
latitude	Double	Latitude for the address.	Optional	62.0
locationCode	String	Location code for the address.	Optional	62.0
longitude	Double	Longitude for the address.	Optional	62.0
postalCode	String	Postal code for the address.	Optional	62.0

Property	Type	Description	Required or Optional	Available Version
state	String	Address state.	Optional	62.0
street	String	Address street.	Optional	62.0

ConnectApi.BillingScheduleRecoveryInputRepresentation

Input representation of the details of the billing schedules to recover the associated invoice.

Property	Type	Description	Required or Optional	Available Version
billingScheduleIds	List<String>	IDs of the billing schedules to recover the invoice for. You can recover one billing schedule per API request.	Required	62.0

ConnectApi.ConvertNegativeInvoiceLinesInputRequest

Input representation of the request details to convert a negative invoice line into a credit.

Property	Type	Description	Required or Optional	Available Version
description	String	Description stamped on the credit memo that's created after the negative invoice line conversion.	Optional	62.0
effectiveDate	String	Date stamped on the credit memo that's created after the negative invoice line conversion.	Required	62.0
invoiceId	String	ID of the invoice whose negative invoice lines must be converted into a posted credit memo.	Required	62.0
invoiceLines	List<String>	Complete list of the negative invoice lines along with the associated invoice line taxes. The specified negative invoice lines are converted into a posted credit memo.	Required	62.0

ConnectApi.CreditDetailsApplyInput

Input representation of the request to specify one or more applications to apply a credit memo line for, with each application representing an invoice line.

Property	Type	Description	Required or Optional	Available Version
appliedAmount	Double	Credit amount to be applied to the invoice line.	Required	62.0
description	String	Explanation or reason for applying the credit memo line.	Optional	62.0
effectiveDate	String	Effective date for the credit memo line.	Optional	62.0
invoiceLineId	String	ID of the invoice line record to apply the credit for.	Required	62.0

ConnectApi.CreditInvoiceInputRequest

Input representation of the details of the request to create a credit memo.

Property	Type	Description	Required or Optional	Available Version
description	String	Description for the credit memo to be created.	Optional	62.0
effectiveDate	String	Date when the credit memo takes effect.	Optional	62.0
invoiceLines	List of Credit Invoice Lines	List of the invoice lines to be credited. The invoice line IDs must be related to the invoice ID specified in the API request. If invoice lines aren't specified, the API request results in an error.	Required	62.0
taxEffectiveDate	String	Date when the tax takes effect to recalculate the taxes.	Optional	62.0
taxStrategy	ConnectApi.TaxStrategyEnum	Tax strategy to be applied across invoice lines. You can override the tax strategy at the individual invoice line level or at the tax line level. Valid values are: <ul style="list-style-type: none"> Ignore—Specifies that the creation of tax lines must be ignored. ManualOverride—Specifies that the provided tax values must be considered for taxes. CopyFromInvoiceLine—Specifies that tax values must be copied from the invoice line. 	Required	62.0

Property	Type	Description	Required or Optional	Available Version
		<ul style="list-style-type: none"> <code>Calculate</code>—Specifies that tax must be calculated by using the API. 		
<code>type</code>	ConnectApi.CreditMemoTypeEnum	Type of credit memo to be created. Valid value is <code>Posted</code> .	Optional	62.0

ConnectApi.CreditInvoiceInvoiceLine

Input representation of the details of the invoice lines to be credited.

Property	Type	Description	Required or Optional	Available Version
<code>addresses</code>	ConnectApi.CreditInvoiceRequestAddresses	Addresses to be created manually for this invoice line and the overridden tax lines. These addresses are only applicable if this invoice line is using the <code>ManualOverride</code> tax strategy.	Optional	62.0
<code>amountToCredit</code>	Double	Amount to be credited from this invoice line.	Required	62.0
<code>invoiceLineId</code>	String	ID of the invoice line record to be credited. The invoice line ID must be related to the invoice ID specified in the API request.	Required	62.0
<code>isTaxOnlyCredit</code>	Boolean	Indicates whether the applicable tax amount is credited for the charge or adjustment amount (<code>true</code>), or the applicable tax amount is credited along with the charge or adjustment amount (<code>false</code>). The default value is <code>false</code> .	Optional	62.0
<code>taxEffectiveDate</code>	String	Date when the tax takes effect and the invoice line is credited.	Optional	62.0
<code>taxStrategy</code>	ConnectApi.TaxStrategyEnum	Tax strategy for crediting the invoice line. This tax strategy takes precedence over the <code>taxStrategy</code> property value specified in the Credit Invoice Input . Valid values are: <ul style="list-style-type: none"> <code>Ignore</code>—Specifies that the creation of tax lines must be ignored. 	Optional	62.0

Property	Type	Description	Required or Optional	Available Version
		<ul style="list-style-type: none"> <code>ManualOverride</code>—Specifies that the provided tax values must be considered for taxes. <code>CopyFromInvoiceLine</code>—Specifies that tax values must be copied from the invoice line. <code>Calculate</code>—Specifies that tax must be calculated by using the API. 		
<code>taxes</code>	ConnectApiInvoiceTax	List of tax lines to be created manually for this invoice line.	Required if the <code>taxStrategy</code> property value is <code>ManualOverride</code> .	62.0

ConnectApi.CreditInvoiceInvoiceLineTax

Input representation of the details of the tax lines to be created manually for the invoice line.

Property	Type	Description	Required or Optional	Available Version
<code>taxAmount</code>	Double	Amount of tax to be applied related to this invoice line.	Required	62.0
<code>taxCode</code>	String	Tax code to be applied related to this invoice line to create the tax line.	Optional	62.0
<code>taxName</code>	String	Name of tax to be applied related to this invoice line.	Optional	62.0
<code>taxRate</code>	Double	Tax rate used to create the tax line.	Optional	62.0

ConnectApi.CreditMemoAddressesInputRequest

Input representation of the details of the billing and shipping addresses.

Property	Type	Description	Required or Optional	Available Version
<code>billingAddress</code>	ConnectApiBillingAddressRequest	Billing address for charge or adjustment line.	Optional	62.0
<code>shippingAddress</code>	ConnectApiShippingAddressRequest	Shipping address for charge or adjustment line.	Optional	62.0

ConnectApi.CreditMemoApplyInputRequest

Input representation of the request to apply a credit memo to an invoice.

Property	Type	Description	Required or Optional	Available Version
applications	List<ConnectApi.CreditMemoApplyInputRequest>	List of one or more applications to apply the credit memo for. Each application represents an invoice that's credited by using the balance of the specified credit memo.	Required	62.0
creditMemoId	String	ID of the credit memo record.	Required	62.0

ConnectApi.CreditMemoLineApplyInput

Input representation of the details of the request to apply a credit memo line to an invoice line.

Property	Type	Description	Required or Optional	Available Version
applyCreditDetails	List<ConnectApi.CreditMemoLineApplyInput>	List of one or more applications to apply the credit memo line for. Each application represents an invoice line that's credited by using the balance of the specified credit memo line.	Required	62.0
creditMemoLineId	String	ID of the credit memo line record.	Required	62.0

ConnectApi.CreditMemoLineUnapplyInput

Input representation of the details of the request to unapply a credit memo line from an invoice line.

Property	Type	Description	Required or Optional	Available Version
creditMemoLineId	String	ID of the credit memo line invoice line record.	Required	62.0
description	String	Explanation or reason for unapplying the credit memo line.	Optional	62.0
effectiveDate	String	Effective date for the credit memo line.	Optional	62.0

ConnectApi.CreditMemoUnapplyInputRequest

Input representation of the request to unapply a credit memo from an invoice.

Property	Type	Description	Required or Optional	Available Version
creditApplicationId	String	ID of the credit memo invoice application.	Required	62.0
description	String	Explanation or reason for unapplying the credit memo.	Optional	62.0
effectiveDate	String	Effective date for the credit memo.	Optional	62.0

ConnectApi.InvoiceDraftToPostedInputRequest

Input representation of the details of the draft invoice that's posted.

Property	Type	Description	Required or Optional	Available Version
correlationId	String	Splunk correlation ID to track the messages that are related to the request and are logged in Splunk by the different services involved in the request. If the ID isn't specified, the service creates a random Universally Unique Identifier (UUID).	Optional	62.0
invoiceIds	List<String>	IDs of the invoice records in <code>Draft</code> status to be posted. You can post one draft invoice per API request.	Required	62.0

ConnectApi.InvoiceInputRepresentation

Input representation of the details of the billing schedule.

Property	Type	Description	Required or Optional	Available Version
action	ConnectApi.InvoiceAction	Type of invoice to be created. Valid values are: <ul style="list-style-type: none"> Draft Posted 	Required	62.0
billingScheduleIds	List<String>	List of billing schedule IDs that's used to create the invoices. You can specify a maximum of 200 billing schedules.	Required	62.0
correlationId	String	Property that's tagged against the published <code>InvoiceProcessedEvent</code> event, if specified.	Optional	62.0
invoiceDate	String	Stamping date of the invoice in ISO 8601 format.	Required	62.0

Property	Type	Description	Required or Optional	Available Version
targetDate	String	Date in ISO 8601 format used to decide the billing periods that are included to create invoices.	Required	62.0

ConnectApi.PaymentLineApplyRequest

Input representation of the payment line details. This representation covers details on allocation of a payment to a specific invoice line. It also provides additional context through optional fields, such as associated account and effective date.

Property	Type	Description	Required or Optional	Available Version
amount	Double	Amount that's applied. The amount must be less than the invoice line and payment balance.	Required	64.0
appliedToId	String	ID of the invoice line that this payment is applied to. Specify the IDs for these records. <ul style="list-style-type: none"> • Invoice • Invoice Line 	Required	64.0
associatedAccountId	String	ID of the associated account.	Optional	64.0
comments	String	Comments that you can add to the payment line application.	Optional	64.0
effectiveDate	Datetime	Date from which the payment line application takes effect.	Optional	64.0

ConnectApi.PaymentLineUnapplyRequest

Input representation of the payment line details. This representation covers fields that you can specify to revert a payment line application.

Property	Type	Description	Required or Optional	Available Version
comments	String	Comments that you can add when you revert a payment line application.	Optional	64.0
effectiveDate	Datetime	Date from when the reversal of the payment line application is in effect.	Optional	64.0

ConnectApi.RefundLineApplyRequest

Input representation of the details of a transaction refund request. This representation outlines the properties of a refund, including the refund amount and ID of the payment or credit memo record that the refund is applied to.

Property	Type	Description	Required or Optional	Available Version
amount	Double	Amount to refund.	Required	64.0
appliedToId	String	ID of a payment or credit memo record. The refund is applied to this object.	Required	64.0
comments	String	Additional details of the refund request.	Optional	64.0
effectiveDate	Datetime	Date from when the refund is in effect.	Optional	64.0

ConnectApi.SequenceGapReconciliationInputRepresentation

The details of the input used to identify and reconcile gaps in sequence values based on the sequence policy or target object.

Property	Type	Description	Required or Optional	Available Version
sequencePolicyIds	List<String>	List of IDs of the sequence policies.	Required if the <code>targetObjects</code> property isn't specified. You must not specify both properties.	65.0
targetObjects	List<String>	List of objects to which the policies are applied.	Required if the <code>sequencePolicyIds</code> property isn't specified. You must not specify both properties.	65.0

ConnectApi.SequencesAssignmentInputRepresentation

The details of the target objects to which the sequence pattern values are assigned.

Property	Type	Description	Required or Optional	Available Version
sequencePolicyId	String	ID of the sequence policy.	Optional	65.0

Property	Type	Description	Required or Optional	Available Version
shouldPublishPlatformEvent	Boolean	Indicates whether to publish a platform event when a sequence is assigned to a target record (<code>true</code>) or not (<code>false</code>).	Optional	65.0
targetObjectIds	List<String>	List of records to which the sequence pattern values are assigned.	Required	65.0

ConnectApi.StandaloneCreditMemoChargeInputRequest

Input representation of the details of the charge lines of a credit memo.

Property	Type	Description	Required or Optional	Available Version
addresses	Credit Memo Addresses Input	Details of the billing and shipping addresses.	Optional	62.0
chargeAmount	Double	Charge amount for the credit memo.	Required	62.0
description	String	Description of the created credit memo charge line.	Optional	62.0
endDate	String	End date of the credit memo charge line.	Optional	62.0
isTaxOnlyCredit	Boolean	Indicates whether the credit is for tax only (<code>true</code>) or not (<code>false</code>).	Optional	62.0
productId	String	ID of the product record that the credit memo is issued on.	Optional	62.0
productName	String	Name of the product that the credit memo is issued on.	Optional	62.0
startDate	String	Start date of the credit memo charge line.	Optional	62.0
taxEffectiveDate	String	Date from when the tax is applicable.	Optional	62.0
taxes	Credit Memo Tax Lines	List of credit memo tax lines.	Optional	62.0
taxStrategy	Credit Memo Tax Strategy	Tax strategy to be applied to this credit memo charge line, child treatment lines, and tax lines. You can override the tax strategy at the individual credit memo lines or tax lines level. Valid values are: <ul style="list-style-type: none"> Ignore—Specifies that the creation of tax lines must be ignored. Manual Override—Specifies that the provided tax values must be considered for taxes. 	Optional	62.0

Property	Type	Description	Required or Optional	Available Version
		<ul style="list-style-type: none"> Calculate—Specifies that tax must be calculated by using the API. 		
treatmentId	String	ID of the tax treatment record that's used to calculate tax.	Optional	62.0

ConnectApi.StandaloneCreditMemoInputRequest

Input representation of the details required to create a standalone credit memo.

Property	Type	Description	Required or Optional	Available Version
billToContactId	String	Contact related to the credit memo.	Optional	62.0
billingAccountId	String	ID of the account that the credit is issued to.	Required	62.0
charges	String List of Charge Lines	Charge lines of the credit memo. Requires at least one charge line.	Required	62.0
currencyIsoCode	String	ISO code currency of the new credit that's issued.	Optional	62.0
description	String	Description for the new credit that's issued.	Optional	62.0
effectiveDate	String	Effective date of the credit memo. If the value isn't specified, then it's null.	Optional	62.0
externalReference	String	ID of the external reference for the credit memo.	Optional	62.0
externalReferenceSource	String	Source of the external reference for the credit memo.	Optional	62.0
taxEffectiveDate	String	Effective date of the credit memo tax. If the value isn't specified, then it's null.	Optional	62.0
taxStrategy	String Credit Memo Tax Strategy	Specifies how tax lines must be created for the standalone credit memos. Valid values are: <ul style="list-style-type: none"> Ignore—Specifies that the creation of tax lines must be ignored. Manual Override—Specifies that the provided tax values must be considered for taxes. Calculate—Specifies that tax must be calculated by using the API. 	Required	62.0

Property	Type	Description	Required or Optional	Available Version
type	ConnectApi.CreditMemoTypeEnum	Type of credit memo to be created. Valid value is Posted.	Optional	62.0

ConnectApi.StandaloneCreditMemoTaxInputRequest

Connect API representation of Tax input request

Property	Type	Description	Required or Optional	Available Version
taxAmount	Double	Amount of tax to be applied.	Required	62.0
taxCode	String	Tax code to be used to create the tax line.	Optional	62.0
taxName	String	Name of tax to be applied.	Optional	62.0
taxRate	Double	Tax rate to be used to create the tax line.	Optional	62.0

ConnectApi Output Classes

Billing includes these Apex output classes.

[ConnectApi.AppliedCreditResponse](#)

Output representation of the list of applied credit memo line results.

[ConnectApi.ApplyCreditResults](#)

Output representation of the list of applied credit memo results.

[ConnectApi.ApplyCreditResult](#)

Connect API representation of credit memo apply output result

[ConnectApi.BillingScheduleRecoveryResult](#)

Output representation of the details of the recovered billing schedules.

[ConnectApi.BillingScheduleRecoveryResults](#)

Output representation of the recovered details of the billing schedules and associated invoice.

[ConnectApi.CreditMemoLineAppliedResponse](#)

Output representation of the list of applied credit memo line results.

[ConnectApi.CreditMemoLineUnappliedResponse](#)

Output representation of the details of the credit memo line invoice line record with the status of the request.

[ConnectApi.ConvertNegativeInvoiceLinesResult](#)

Output representation of the details of the credit memo along with the status of the request.

[ConnectApi.InvoiceBatchDraftToPostedResult](#)

Output representation of the batch update details of the invoices from Draft to Posted status.

[ConnectApi.InvoiceRecoveryResult](#)

Output representation of the details of the recovered invoice and billing schedules.

[ConnectApi.PaymentLineApplyResponse](#)

Output representation of the details of the applied payment line. The details include the ID of the payment record and date when the payment line was applied.

[ConnectApi.PaymentLineUnapplyResponse](#)

Output representation of the details of the reversed payment line application. The details include the ID of the payment line record and date when the payment line application was reversed.

[ConnectApi.ReferenceLineError](#)

Output representation of the details of the line level errors.

[ConnectApi.RefundLineApplyResponse](#)

Output representation of the details of an applied refund. This representation includes the properties of a refund line, such as the date when the refund is applied against a payment and ID of the refund line record.

[ConnectApi.RevenueAsyncLineLevelOutputResponse](#)

Output representation of the result of the API request for the async line level operations.

[ConnectApi.RevenueAsyncRepresentation](#)

Output representation of the result of the API request with the request identifier.

[ConnectApi.SequenceErrorOutputRepresentation](#)

Output representation of the error response that's associated with a request to create or update a sequence policy, or assign sequences.

[ConnectApi.SequenceGapReconciliationOutputRepresentation](#)

Output representation of the details of the sequence gap reconciliation.

[ConnectApi.SequenceGapReconciliationErrorOutputRepresentation](#)

List of errors encountered during the processing of the API request.

[ConnectApi.SequencesAssignmentOutputRepresentation](#)

Output representation showing the status of the assigned sequence pattern values.

[ConnectApi.SequencesAssignmentResultOutputRepresentation](#)

Output representation of the details of the assigned sequence values to target objects.

[ConnectApi.UnapplyCreditResult](#)

Output representation of the details of the credit memo invoice application record with the status of the request.

ConnectApi.AppliedCreditResponse

Output representation of the list of applied credit memo line results.

Property Name	Type	Description	Available Version
creditMemoLineInvoiceLineId	String	ID of the credit memo line invoice line ID.	62.0
errors	ConnectApi.ErrorResponse	List of errors encountered during the processing of the API request.	62.0
invoiceLineId	String	ID of the invoice line record that the credit is applied to.	62.0
success	Boolean	Indicates whether the credit memo line is successfully applied (<code>true</code>) or not (<code>false</code>).	62.0

ConnectApi.ApplyCreditResults

Output representation of the list of applied credit memo results.

Property Name	Type	Description	Available Version
applyCreditResults	List< ConnectApi.ApplyCreditResult >	Output list of the applied credit memo results.	62.0

ConnectApi.ApplyCreditResult

Connect API representation of credit memo apply output result

Property Name	Type	Description	Available Version
appliedToId	String	ID of the invoice record that the credit is applied to.	62.0
errors	List< ConnectApiErrorResponse >	List of errors encountered during the processing of the API request.	62.0
id	String	ID of the credit memo invoice application.	62.0
success	Boolean	Indicates whether the credit memo is successfully applied (<code>true</code>) or not (<code>false</code>).	62.0

ConnectApi.BillingScheduleRecoveryResult

Output representation of the details of the recovered billing schedules.

Property Name	Type	Description	Available Version
billingScheduleId	String	ID of the billing schedule.	62.0
billingScheduleStatus	String	Flag that indicates the billing schedule status.	62.0

ConnectApi.BillingScheduleRecoveryResults

Output representation of the recovered details of the billing schedules and associated invoice.

Property Name	Type	Description	Available Version
recoveryResults	List< ConnectApiBillingRecoveryResult >	Details of the recovered invoice and billing schedules.	62.0

ConnectApi.CreditMemoLineAppliedResponse

Output representation of the list of applied credit memo line results.

Property Name	Type	Description	Available Version
appliedCreditResponses	List<ConnectApi.AppliedCreditResponse>	Output list for the applied credit memo line results.	62.0

ConnectApi.CreditMemoLineUnappliedResponse

Output representation of the details of the credit memo line invoice line record with the status of the request.

Property Name	Type	Description	Available Version
creditMemoLineInvoiceLineId	String	ID of the credit memo line invoice line record.	62.0
errors	List<ConnectApi.ErrorResponse>	List of errors encountered during the processing of the API request.	62.0
success	Boolean	Indicates whether the credit memo line is successfully unapplied (<code>true</code>) or not (<code>false</code>).	62.0

ConnectApi.ConvertNegativeInvoiceLinesResult

Output representation of the details of the credit memo along with the status of the request.

Property Name	Type	Description	Available Version
errors	List<ConnectApi.ErrorResponse>	List of errors encountered during the processing of the API request.	62.0
id	String	ID of the credit memo that's created after the conversion of the negative invoice lines.	62.0
success	Boolean	Indicates whether the API request is successful (<code>true</code>) or not (<code>false</code>).	62.0

ConnectApi.InvoiceBatchDraftToPostedResult

Output representation of the batch update details of the invoices from `Draft` to `Posted` status.

Property Name	Type	Description	Available Version
invoiceBatchDraftToPostedId	String	ID of the invoice batch draft to posted run record that's created to track the batch process of posting the draft invoices that are associated with the parent invoice batch run record.	62.0
success	Boolean	Indicates whether the API request is successful (<code>true</code>) or not (<code>false</code>).	62.0

ConnectApi.InvoiceRecoveryResult

Output representation of the details of the recovered invoice and billing schedules.

Property Name	Type	Description	Available Version
billingSchedules	List<ConnectApiBillingSchedule>	Billing schedules associated with this invoice.	62.0
invoiceErrors	List<ConnectApiErrorResponse>	List of errors encountered during the invoice recovery.	62.0
invoiceId	String	ID of the recovered invoice.	62.0
invoiceStatus	String	Flag that indicates the invoice status.	62.0
success	Boolean	Indicates whether the overall transaction was successful or not (<code>true</code>) or not (<code>false</code>).	62.0

ConnectApi.PaymentLineApplyResponse

Output representation of the details of the applied payment line. The details include the ID of the payment record and date when the payment line was applied.

Property Name	Type	Description	Available Version
appliedDate	Datetime	Date when the payment line was applied.	64.0
id	String	ID of the payment line record.	64.0

ConnectApi.PaymentLineUnapplyResponse

Output representation of the details of the reversed payment line application. The details include the ID of the payment line record and date when the payment line application was reversed.

Property Name	Type	Description	Available Version
id	String	ID of the payment line record.	64.0
unappliedDate	Datetime	Date when the payment line application was reversed.	64.0

ConnectApi.ReferenceLineError

Output representation of the details of the line level errors.

Property Name	Type	Description	Available Version
errors	List<ConnectApiErrorResponse>	List of errors with error code and error message for the specified invoice line ID.	62.0

Property Name	Type	Description	Available Version
referenceLineId	String	ID of the invoice line specified in the API request that has an issue, causing the API request to fail.	62.0

ConnectApi.RefundLineApplyResponse

Output representation of the details of an applied refund. This representation includes the properties of a refund line, such as the date when the refund is applied against a payment and ID of the refund line record.

Property Name	Type	Description	Available Version
appliedDate	Datetime	Date when the refund is applied against a payment.	64.0
id	String	ID of the refund line record.	64.0

ConnectApi.RevenueAsyncLineLevelOutputResponse

Output representation of the result of the API request for the async line level operations.

Property Name	Type	Description	Available Version
errors	List< ConnectApiErrorResponse >	Details of errors, if any.	62.0
referenceLineErrorResults	List< ConnectApiReferenceLineError >	List of errors grouped by the invoice line IDs if the API request fails.	62.0
referenceLineType	String	Reference type for the reference line entity in the <code>referenceLineErrorResults</code> property.	62.0
requestIdentifier	String	Unique identifier of the request.	62.0
statusURL	String	URL to track the status of the operation.	62.0
success	Boolean	Indicates whether the API request is successful (<code>true</code>) or not (<code>false</code>).	62.0

ConnectApi.RevenueAsyncRepresentation

Output representation of the result of the API request with the request identifier.

Property Name	Type	Description	Available Version
errors	List< ConnectApiErrorResponse >	Details of errors, if any.	62.0

Property Name	Type	Description	Available Version
request Identifier	String	Unique identifier of the request.	62.0
success	Boolean	Indicates whether the API request is successful (<code>true</code>) or not (<code>false</code>).	62.0

ConnectApi.SequenceErrorOutputRepresentation

Output representation of the error response that's associated with a request to create or update a sequence policy, or assign sequences.

Property Name	Type	Description	Available Version
errorCode	String	Code for the resultant error.	65.0
message	String	Error message for the resultant error.	65.0

ConnectApi.SequenceGapReconciliationOutputRepresentation

Output representation of the details of the sequence gap reconciliation.

Property Name	Type	Description	Available Version
error	ConnectApi.SequenceErrorOutputRepresentation	List of errors encountered during the processing of the API request.	65.0
jobId	String	Unique identifier assigned to sequence gap reconciliation asynchronous process.	65.0
sequencePolicyIds	List<String>	List of IDs of the sequence policies.	65.0
status	StatusEnum	The status of sequence reconciliation API request. Valid values are: <ul style="list-style-type: none"> Submitted NotSubmitted 	65.0
submittedAt	String	Date and time when the reconciliation request was submitted to the async job.	65.0
targetObjects	List<String>	List of objects to which the policies are applied.	65.0

ConnectApi.SequenceGapReconciliationErrorOutputRepresentation

List of errors encountered during the processing of the API request.

Property Name	Type	Description	Available Version
errorCode	String	Code for the resultant error.	65.0

Property Name	Type	Description	Available Version
errorMessage	String	Error message for the resultant error.	65.0

ConnectApi.SequencesAssignmentOutputRepresentation

Output representation showing the status of the assigned sequence pattern values.

Property Name	Type	Description	Available Version
errors	ConnectApi.SequenceAssignmentOutputRepresentation	Error encountered during the processing of the API request.	65.0
sequencesAssignment	ConnectApi.SequenceAssignmentOutputRepresentation	Details of the sequence pattern values assignment.	65.0
status	SequenceResponseStatusEnum	Status of the sequence policy assignment. Valid values are: <ul style="list-style-type: none"> PartialSuccess Success Failed 	65.0

ConnectApi.SequencesAssignmentResultOutputRepresentation

Output representation of the details of the assigned sequence values to target objects.

Property Name	Type	Description	Available Version
errors	ConnectApi.SequenceAssignmentOutputRepresentation	Error encountered during the processing of the API request.	65.0
isSuccess	Boolean	Indicates whether the sequence pattern value was assigned (<code>true</code>) or not (<code>false</code>).	65.0
sequencePatternValue	String	Sequence pattern value assigned to the target object.	65.0
sequencePolicyId	String	ID of the sequence policy assigned to the target object.	65.0
targetObjectId	String	Record to which the sequence pattern value is assigned.	65.0

ConnectApi.UnapplyCreditResult

Output representation of the details of the credit memo invoice application record with the status of the request.

Property Name	Type	Description	Available Version
errors	List<ConnectApiErrorResponse>	List of errors encountered during the processing of the API request.	62.0

Property Name	Type	Description	Available Version
id	String	ID of the credit memo invoice application record.	62.0
success	Boolean	Indicates whether the credit memo is successfully unapplied (<code>true</code>) or not (<code>false</code>).	62.0

ConnectApi Enums

Enums specific to the `ConnectApi` namespace.

`ConnectApi` enums inherit all properties and methods of Apex enums.

Enums are not versioned. Enum values are returned in all API versions.

Enum	Description
<code>ConnectApi.InvoiceAction</code>	Type of invoice to be created. Valid values are: <ul style="list-style-type: none"> • <code>Draft</code> • <code>Posted</code>
<code>ConnectApi.TaxStrategyEnum</code>	Tax strategy to be applied across invoice lines. You can override the tax strategy at the individual invoice line level or at the tax line level. Valid values are: <ul style="list-style-type: none"> • <code>Ignore</code>—Specifies that the creation of tax lines must be ignored. • <code>ManualOverride</code>—Specifies that the provided tax values must be considered for taxes. • <code>CopyFromInvoiceLine</code>—Specifies that tax values must be copied from the invoice line. • <code>Calculate</code>—Specifies that tax must be calculated by using the API.
<code>ConnectApi.CreditMemoTypeEnum</code>	Type of credit memo to be created. Valid value is <code>Posted</code> .
<code>ConnectApi.StandaloneTaxStrategyEnum</code>	Specifies how tax lines must be created for the standalone credit memos. Valid values are: <ul style="list-style-type: none"> • <code>Ignore</code>—Specifies that the creation of tax lines must be ignored. • <code>ManualOverride</code>—Specifies that the provided tax values must be considered for taxes. • <code>Calculate</code>—Specifies that tax must be calculated by using the API.
<code>ConnectApi.SequenceResponseStatusEnum</code>	Status of the sequence policy assignment. Valid values are: <ul style="list-style-type: none"> • <code>PartialSuccess</code> • <code>Success</code> • <code>Failed</code>
<code>ConnectApi.StatusEnum</code>	The status of sequence reconciliation API request. Valid values are: <ul style="list-style-type: none"> • <code>Submitted</code> • <code>NotSubmitted</code>

InvoiceWriteOff Namespace

Create credit memos with the total charge amount on the invoice as the write-off amount and close the invoice.

The `InvoiceWriteOff` namespace includes these classes.

Usage

You need the Billing Operations User and Credit Memo Operations User permission sets to access this namespace.

[WriteOffInvoiceInput Class](#)

Contains invoice details that are used for the request to write off an invoice.

[WriteOffInvoiceInputList Class](#)

Contains invoice details to write off a list of posted invoices.

[WriteOffInvoiceResponse Class](#)

Contains properties to store the response details to the request to write off a posted invoice.

[WriteOffInvoiceResponseError Class](#)

Contains properties to store the error response that's associated with a request to write off a posted invoice.

[WriteOffInvoiceResponseList Class](#)

Contains properties to store the response details of the list of invoices that are written off.

WriteOffInvoiceInput Class

Contains invoice details that are used for the request to write off an invoice.

Namespace

[InvoiceWriteOff](#) on page 2134

[WriteOffInvoiceInput Constructors](#)

Learn more about the constructors available with the `WriteOffInvoiceInput` class.

[WriteOffInvoiceInput Properties](#)

Learn more about the properties available with the `WriteOffInvoiceInput` class.

WriteOffInvoiceInput Constructors

Learn more about the constructors available with the `WriteOffInvoiceInput` class.

The `WriteOffInvoiceInput` class includes these constructors.

[WriteOffInvoiceInput\(invoiceId, reasonCode, reason\)](#)

Initializes the `WriteOffInvoiceInput` class that stores the invoice details and reason for writing off invoices.

[WriteOffInvoiceInput\(\)](#)

Initializes the `WriteOffInvoiceInput` class.

WriteOffInvoiceInput(invoiceId, reasonCode, reason)

Initializes the WriteOffInvoiceInput class that stores the invoice details and reason for writing off invoices.

Signature

```
public WriteOffInvoiceInput(String invoiceId, String reasonCode, String reason)
```

Parameters

invoiceId

Type: String

ID of the invoice record that you want to write off.

reasonCode

Type: String

Code that categorizes the write-off reason. For example, if the reason for the invoice write-off is a disputed amount, the reason code can be Disputed Amount (DA).

reason

Type: String

Reason for writing off invoices.

WriteOffInvoiceInput ()

Initializes the WriteOffInvoiceInput class.

Signature

```
public WriteOffInvoiceInput ()
```

WriteOffInvoiceInput Properties

Learn more about the properties available with the WriteOffInvoiceInput class.

The `WriteOffInvoiceInput` class includes these properties.

[invoiceId](#)

Sets the ID of the invoice record that must be written off.

[reason](#)

Sets the reason for writing off invoices.

[reasonCode](#)

Sets the code that categorizes the write-off reason.

invoiceId

Sets the ID of the invoice record that must be written off.

Signature

```
public String invoiceId {get; set;}
```

Property Value

Type: String

reason

Sets the reason for writing off invoices.

Signature

```
public String reason {get; set;}
```

Property Value

Type: String

reasonCode

Sets the code that categorizes the write-off reason.

Signature

```
public String reasonCode {get; set;}
```

Property Value

Type: String

WriteOffInvoiceInputList Class

Contains invoice details to write off a list of posted invoices.

Namespace

[InvoiceWriteOff](#) on page 2134

[WriteOffInvoiceInputList Constructors](#)

Learn more about the constructors available with the WriteOffInvoiceInputList class.

[WriteOffInvoiceInputList Properties](#)

Learn more about the properties available with the WriteOffInvoiceInputList class.

WriteOffInvoiceInputList Constructors

Learn more about the constructors available with the WriteOffInvoiceInputList class.

The `WriteOffInvoiceInputList` class includes these constructors.

[WriteOffInvoiceInputList\(writeOffInvoiceInputList\)](#)

Initializes the WriteOffInvoiceInputList class that stores the details of invoices that you want to write off.

[WriteOffInvoiceInputList\(\)](#)

Initializes the WriteOffInvoiceInputList class.

WriteOffInvoiceInputList (writeOffInvoiceInputList)

Initializes the WriteOffInvoiceInputList class that stores the details of invoices that you want to write off.

Signature

```
public WriteOffInvoiceInputList (List<InvoiceWriteOff.WriteOffInvoiceInput>
writeOffInvoiceInputList)
```

Parameters

writeOffInvoiceInputList

Type: List<[InvoiceWriteOff.WriteOffInvoiceInput](#) on page 2134>

Input representation of the request to write off a list of posted invoices.

WriteOffInvoiceInputList ()

Initializes the WriteOffInvoiceInputList class.

Signature

```
public WriteOffInvoiceInputList ()
```

WriteOffInvoiceInputList Properties

Learn more about the properties available with the WriteOffInvoiceInputList class.

The `WriteOffInvoiceInputList` class includes these properties.

[writeOffInvoiceInputList](#)

Input representation of the request to write off a list of posted invoices.

writeOffInvoiceInputList

Input representation of the request to write off a list of posted invoices.

Signature

```
public List<InvoiceWriteOff.WriteOffInvoiceInput> writeOffInvoiceInputList {get; set;}
```

Property Value

Type: List<[InvoiceWriteOff.WriteOffInvoiceInput](#) on page 2134>

WriteOffInvoiceResponse Class

Contains properties to store the response details to the request to write off a posted invoice.

Namespace

[InvoiceWriteOff](#) on page 2134

[WriteOffInvoiceResponse Constructors](#)

Learn more about the constructors available with the `WriteOffInvoiceResponse` class.

[WriteOffInvoiceResponse Properties](#)

Learn more about the properties available with the `WriteOffInvoiceResponse` class.

WriteOffInvoiceResponse Constructors

Learn more about the constructors available with the `WriteOffInvoiceResponse` class.

The `WriteOffInvoiceResponse` class includes these constructors.

[WriteOffInvoiceResponse\(errors, invoiceId, requestIdIdentifier, success\)](#)

Initializes the `WriteOffInvoiceResponse` class that stores the response details to the request to write off a posted invoice.

WriteOffInvoiceResponse(errors, invoiceId, requestIdIdentifier, success)

Initializes the `WriteOffInvoiceResponse` class that stores the response details to the request to write off a posted invoice.

Signature

```
public WriteOffInvoiceResponse (InvoiceWriteOff.WriteOffInvoiceResponseError errors,  
String invoiceId, String requestIdIdentifier, Boolean success)
```

Parameters

errors

Type: [InvoiceWriteOff.WriteOffInvoiceResponseError](#) on page 2140

If the request fails, this property contains a list of errors.

invoiceId

Type: String

ID of the invoice record that's written off.

requestIdentifier

Type: String

If the request is successful, this property contains an asynchronous API request identifier for an invoice ID.

success

Type: Boolean

Indicates whether the invoice write-off request was successful (`true`) or not (`false`).

WriteOffInvoiceResponse Properties

Learn more about the properties available with the WriteOffInvoiceResponse class.

The `WriteOffInvoiceResponse` class includes these properties.

[errors](#)

Get the list of errors if the request to write off posted invoices fails.

[invoiceId](#)

Get the ID of the invoice record that's written off.

[requestIdentifier](#)

Get the identifier of the asynchronous API request for an invoice ID if the request is successful.

[success](#)

Get the request status of the invoice write-off request.

errors

Get the list of errors if the request to write off posted invoices fails.

Signature

```
public InvoiceWriteOff.WriteOffInvoiceResponseError errors {get; set;}
```

Property Value

Type: [InvoiceWriteOff.WriteOffInvoiceResponseError](#) on page 2140

invoiceId

Get the ID of the invoice record that's written off.

Signature

```
public String invoiceId {get; set;}
```

Property Value

Type: String

requestIdentifier

Get the identifier of the asynchronous API request for an invoice ID if the request is successful.

Signature

```
public String requestIdentifier {get; set;}
```

Property Value

Type: String

success

Get the request status of the invoice write-off request.

Signature

```
public Boolean success {get; set;}
```

Property Value

Type: Boolean

WriteOffInvoiceResponseError Class

Contains properties to store the error response that's associated with a request to write off a posted invoice.

Namespace

[InvoiceWriteOff](#) on page 2134

[WriteOffInvoiceResponseError Constructors](#)

Learn more about the constructors available with the WriteOffInvoiceResponseError class.

[WriteOffInvoiceResponseError Properties](#)

Learn more about the properties available with the WriteOffInvoiceResponseError class.

WriteOffInvoiceResponseError Constructors

Learn more about the constructors available with the WriteOffInvoiceResponseError class.

The `WriteOffInvoiceResponseError` class includes these constructors.

[WriteOffInvoiceResponseError\(errorCode, errorMessage\)](#)

Initializes the WriteOffInvoiceResponseError class that stores the error response that's associated with a request to write off a posted invoice.

WriteOffInvoiceResponseError(errorCode, errorMessage)

Initializes the WriteOffInvoiceResponseError class that stores the error response that's associated with a request to write off a posted invoice.

Signature

```
public WriteOffInvoiceResponseError(String errorCode, String errorMessage)
```

Parameters

errorCode

Type: String

Code that represents the error.

errorMessage

Type: String

Message that describes the error.

WriteOffInvoiceResponseError Properties

Learn more about the properties available with the WriteOffInvoiceResponseError class.

The `WriteOffInvoiceResponseError` class includes these properties.

[errorCode](#)

Get the error code details.

[errorMessage](#)

Get the error message details.

errorCode

Get the error code details.

Signature

```
public String errorCode {get; set;}
```

Property Value

Type: String

errorMessage

Get the error message details.

Signature

```
public String errorMessage {get; set;}
```

Property Value

Type: String

WriteOffInvoiceResponseList Class

Contains properties to store the response details of the list of invoices that are written off.

Namespace

[InvoiceWriteOff](#) on page 2134

[WriteOffInvoiceResponseList Constructors](#)

Learn more about the constructors available with the WriteOffInvoiceResponseList class.

[WriteOffInvoiceResponseList Properties](#)

Learn more about the properties available with the `WriteOffInvoiceResponseList` class.

WriteOffInvoiceResponseList Constructors

Learn more about the constructors available with the `WriteOffInvoiceResponseList` class.

The `WriteOffInvoiceResponseList` class includes these constructors.

[WriteOffInvoiceResponseList\(writeOffInvoiceResponseList\)](#)

Initializes the `WriteOffInvoiceResponseList` class that stores the response details of the list of invoices that are written off.

[WriteOffInvoiceResponseList\(\)](#)

Initializes the `WriteOffInvoiceResponseList` class.

WriteOffInvoiceResponseList (writeOffInvoiceResponseList)

Initializes the `WriteOffInvoiceResponseList` class that stores the response details of the list of invoices that are written off.

Signature

```
public WriteOffInvoiceResponseList (List<InvoiceWriteOff.WriteOffInvoiceResponse>
writeOffInvoiceResponseList)
```

Parameters

writeOffInvoiceResponseList

Type: [List<InvoiceWriteOff.WriteOffInvoiceResponse](#) on page 2138>

Details of the invoices for which the write-off process is initiated.

WriteOffInvoiceResponseList ()

Initializes the `WriteOffInvoiceResponseList` class.

Signature

```
public WriteOffInvoiceResponseList ()
```

WriteOffInvoiceResponseList Properties

Learn more about the properties available with the `WriteOffInvoiceResponseList` class.

The `WriteOffInvoiceResponseList` class includes these properties.

[writeOffInvoiceResponseList](#)

Get the details of the invoices for which the write-off posted invoice process is initiated.

writeOffInvoiceResponseList

Get the details of the invoices for which the write-off posted invoice process is initiated.

Signature

```
public List<InvoiceWriteOff.WriteOffInvoiceResponse> writeOffInvoiceResponseList {get;
set; }
```

Property Value

Type: [List<InvoiceWriteOff.WriteOffInvoiceResponse](#) on page 2138>

TaxEngineAdapter Interface

Retrieves and evaluates the details from a tax engine to define tax details.

You can extend the `TaxEngineAdapter` interface to define a custom tax adapter based on your requirements. Use the custom tax adapter with Billing services to implement standard tax.

Create a custom object and associated fields to store tax details, such as tax rate for a country. For example, create a custom object named `CountryTaxRate` with `Country_Code` and `Tax_Rate` fields. Create records to define the details for these fields.

[TaxEngineAdapter Methods](#)

Learn more about the available methods with the `TaxEngineAdapter` class.

[TaxEngineAdapter Example Implementation](#)

Refer to the example implementation of the `TaxEngineAdapter` interface to accept information from a tax engine and evaluate the information to define tax details.

[Tax Mappings for Invoices and Credits](#)

You can extend and customize the existing tax interface by using custom metadata types and tax mappings. These customizations help you with unique business requirements such as the inclusion of specific data for accurate calculations and audits.

SEE ALSO:

[Salesforce Help: Tax Calculation for Invoices](#)

[Billing Business APIs: Tax Calculation \(POST\)](#)

[Billing Standard Objects: TaxEngineProvider, TaxEngine, TaxPolicy, and TaxTreatment](#)

[Tax Engine Reference Gateway Adapter](#)

TaxEngineAdapter Methods

Learn more about the available methods with the `TaxEngineAdapter` class.

The `TaxEngineAdapter` class includes these methods.

[processRequest\(requestType\)](#)

The `processRequest` method takes an instance of `TaxEngineContext` class and returns a response with the calculated tax details through the `TaxDetailsResponse` class or an error response through the `ErrorResponse` class.

processRequest (requestType)

The `processRequest` method takes an instance of `TaxEngineContext` class and returns a response with the calculated tax details through the `TaxDetailsResponse` class or an error response through the `ErrorResponse` class.

Signature

```
global commercetax.TaxEngineResponse processRequest (commercetax.TaxEngineContext var1)
```

Parameters

var1

Type: [TaxEngineContext](#)

Wrapper class that stores information about the type of a tax calculation request.

Return Value

Type: [TaxEngineResponse](#)

Generic interface representing a response from a tax engine.

TaxEngineAdapter Example Implementation

Refer to the example implementation of the `TaxEngineAdapter` interface to accept information from a tax engine and evaluate the information to define tax details.

Namespace


See [commercetax](#) namespace to view the list of available classes.

Usage

The `TaxEngineAdapter` interface accepts information from the tax engine through the `TaxEngineContext` class. The interface evaluates the information to define tax in the response with details, such as tax amount and addresses. The response is used to update and create entities in the Salesforce org.

Considerations

From Winter '26, the available state and country values from orgs that are configured with [State and Country/Territory Picklists](#) are also supported.

 **Example:** Use these steps to build a sample tax adapter implementation. Each tax adapter implementation varies based on your implementation requirements. Customize this example to suit your business requirements.

See [Tax Engine Reference Gateway Adapter](#) for reference implementations of a tax engine adapter.

- Get the tax rates from the created custom object. See [TaxEngineAdapter Interface](#) on page 2143.
- The custom adapter class implements the `TaxEngineAdapter` interface. The `processRequest` method takes an instance of `TaxEngineContext` class and returns a response with the calculated tax details through the `TaxDetailsResponse` class or an error response through the `ErrorResponse` class.

```
global virtual class StandardTaxAdapter implements commercetax.TaxEngineAdapter {
    global commercetax.TaxEngineResponse processRequest (commercetax.TaxEngineContext
    taxEngineContext) {
        commercetax.RequestType requestType = taxEngineContext.getRequestType();

        // Map of tax field name to the value of the corresponding entity field
        (EntityFieldName) at header level
```

```

        Map<String, Object> customTaxAttributeHeaderLevelMap = new Map<String,
Object>();
        // Map of tax field name to the value of the corresponding entity field
(EntityFieldName) at line level
        Map<String, Object> customTaxAttributeLineLevelMap = new Map<String,
Object>();
        // Map of tax field name to the value of the corresponding entity field
(EntityFieldName) at line tax level
        Map<String, Object> customTaxAttributeLineTaxLevelMap = new Map<String,
Object>();

        commercetax.CustomTaxAttributesResponse customTaxAttributeHeaderLevelResponse
= new commercetax.CustomTaxAttributesResponse();
        commercetax.CustomTaxAttributesResponse customTaxAttributeLineLevelResponse
= new commercetax.CustomTaxAttributesResponse();
        commercetax.CustomTaxAttributesResponse customTaxAttributeLineTaxLevelResponse
= new commercetax.CustomTaxAttributesResponse();

customTaxAttributeHeaderLevelResponse.setData(customTaxAttributeHeaderLevelMap);
        customTaxAttributeLineLevelResponse.setData(customTaxAttributeLineLevelMap);

customTaxAttributeLineTaxLevelResponse.setData(customTaxAttributeLineTaxLevelMap);

        commercetax.CalculateTaxRequest request = (commercetax.CalculateTaxRequest)
taxEngineContext.getRequest();
        if (request.documentCode == null) {
            return new
commercetax.ErrorResponse(commercetax.resultcode.TaxEngineError, '404', 'documentCode
is mandatory');
        }
        if (request.documentCode == 'TaxEngineError') {
            return new
commercetax.ErrorResponse(commercetax.resultcode.TaxEngineError, '504', 'documentCode
- not supported');
        }
        if (request.documentCode == 'simulateUnhandledExceptionInAdapter') {
            Integer foo = 5 / 0;
        }
        if (request.documentCode == 'simulateValidationFailureInAdapter') {
            return new commercetax.ErrorResponse(
                commercetax.resultcode.TaxEngineError,
                '400',
                'validations for documentCode failed in adapter'
            );
        }
        if (request.documentCode == 'simulateMalformedErrorInAdapter') {
            return new
commercetax.ErrorResponse(commercetax.resultcode.TaxEngineError, null, 'malformed
adapter error response');
        }
        if (request.documentCode == 'simulateTaxEngineProcessFailure') {
            return new

```

```

commercetax.ErrorResponse(commercetax.resultcode.TaxEngineError, '500', 'Tax Engine
  couldnt process your request');
    }
    if (request.documentCode == 'simulateReferenceDocumentCodeMissing') {
        return new
commercetax.ErrorResponse(commercetax.resultcode.ReferenceDocumentCodeMissing, '400',
  'Ref Document Code not found');
    }

    if (requestType == commercetax.RequestType.CalculateTax) {
        commercetax.calculatetaxtype type = request.taxtype;
        String docCode = '';
        if (request.DocumentCode == 'simulateEmptyDocumentCode')
            docCode = '';
        else if (request.DocumentCode != null)
            docCode = request.DocumentCode;
        else if (request.ReferenceEntityId != null)
            docCode = request.ReferenceEntityId;
        else
            docCode = String.valueOf(getRandomInteger(0, 2147483647));
        commercetax.CalculateTaxResponse response = new
commercetax.CalculateTaxResponse();
        response.setCustomTaxAttributes(customTaxAttributeHeaderLevelResponse);

        if (request.isCommit == true) {
            response.setStatus(commercetax.TaxTransactionStatus.Committed);
        } else {
            response.setStatus(commercetax.TaxTransactionStatus.Uncommitted);
        }

        if (request.shouldVoidTax) {
            if
(request.documentCode.startsWith('simulateCalculateWhenRefDocIsLocked')) {
                response.setDocumentCode(docCode);
                response.setReferenceDocumentCode(request.referenceDocumentCode);

                if (request.taxTransactionType == null) {
response.setTaxTransactionType(commercetax.TaxTransactionType.Debit);
                } else {
                    response.setTaxTransactionType(request.taxTransactionType);
                }
            } else if
(request.documentCode.startsWith('simulateRandomRefDocumentCode')) {
                response.setDocumentCode(docCode);

response.setReferenceDocumentCode('simulateRandomRefDocumentCode2');
                response.setTaxTransactionType(request.taxTransactionType);
            } else if (request.documentCode.startsWith('simulateRandomCode'))
{
                response.setDocumentCode('simulateRandomCode2');
                response.setReferenceDocumentCode(null);
            }
        }
    }
}

```

```

response.setTaxTransactionType (commercetax.TaxTransactionType.Void);
    } else {
        response.setDocumentCode (request.referenceDocumentCode);
        response.setReferenceDocumentCode (null);

response.setTaxTransactionType (commercetax.TaxTransactionType.Void);
    }
    } else {
        response.setDocumentCode (docCode);
        response.setReferenceDocumentCode (request.referenceDocumentCode);

        if (request.taxTransactionType == null) {

response.setTaxTransactionType (commercetax.TaxTransactionType.Debit);
            } else {
                response.setTaxTransactionType (request.taxTransactionType);
            }
        }

        response.setTaxType (type);
        response.setStatusDescription ('statusDescription');
        if (request.sellerDetails.code == 'testSellerCode') {
            response.setDescription ('SellerCode fetched from TaxEngine entity');

        } else {
            response.setDescription ('description');
        }
        response.setEffectiveDate (system.now());
        if (request.transactionDate == null) {
            response.setTransactionDate (system.now());
        } else {
            response.setTransactionDate (request.transactionDate);
        }

        if (request.currencyIsoCode == null || request.currencyIsoCode == '')
    {
        response.setCurrencyIsoCode ('USD');
    } else {
        response.setCurrencyIsoCode (request.currencyIsoCode);
    }
    response.setReferenceEntityId (request.ReferenceEntityId);
    Double totalTax = 0.0;
    Double totalAmount = 0.0;
    List<commercetax.LineItemResponse> lineItemResponses = new
List<commercetax.LineItemResponse> ();
    for (Commercetax.TaxLineItemRequest lineItem : request.lineItems) {
        String country = getCountryFromLineItem (lineItem);
        if (country == null) {
            return new commercetax.ErrorResponse (
                commercetax.resultcode.TaxEngineError,
                '400',
                'Country is mandatory for each line item'
            );
        }
    }
}

```

```

        Double taxRate = countryTaxRateMap.get(country);
        if (taxRate == null) {
            return new commercetax.ErrorResponse(
                commercetax.resultcode.TaxEngineError,
                '404',
                'No tax rate found for the specified country: ' + country
            );
        }
        commercetax.AddressesResponse addressesRes = new
commercetax.AddressesResponse();
        if (request.DocumentCode == 'SetsNullForResponseWithoutException')
        {
            addressesRes.setShipFrom(null);
            addressesRes.setShipTO(null);
            addressesRes.setSoldTo(null);
        } else {
            setAddresses(addressesRes, lineItem);
            //System.debug('Line item addresses: ' + addressesRes);
        }
        //System.debug('ProductSKU: ' + lineItem.productSKU);
        //System.debug('ReferenceDocumentCode: ' +
lineItem.referenceDocumentCode);
        commercetax.LineItemResponse lineItemResponse = new
commercetax.LineItemResponse();

        lineItemResponse.setCustomTaxAttributes(customTaxAttributeLineLevelResponse);
        Double totalLineTax = 0;
        List<commercetax.TaxDetailsResponse> taxDetailsResponses = new
List<commercetax.TaxDetailsResponse>();
        for (integer i = 0; i < 1; i++) {
            Integer rate = 1;
            Double taxableAmount = lineItem.amount;
            commercetax.TaxDetailsResponse taxDetailsResponse = new
commercetax.TaxDetailsResponse();
            taxDetailsResponse.setRate(Double.valueOf(rate));
            taxDetailsResponse.setTaxableAmount(taxableAmount);
            Double tax = taxableAmount * rate;
            totalLineTax += tax;
            taxDetailsResponse.setTax(taxableAmount * rate);
            taxDetailsResponse.setExemptAmount(0);
            taxDetailsResponse.setExemptReason('exemptReason');
            taxDetailsResponse.setTaxRegionId('taxRegionId');
            taxDetailsResponse.setTaxId(String.valueOf(getRandomInteger(0,
2323233)));
            taxDetailsResponse.setSerCode('serCode');

            taxDetailsResponse.setCustomTaxAttributes(customTaxAttributeLineTaxLevelResponse);
            taxDetailsResponse.setTaxAuthorityTypeId('taxAuthorityTypeId');

            if (request.DocumentCode == 'SetsNullForResponseWithoutException')
            {
                taxDetailsResponse.setImposition(null);
            } else {

```



```

        commercetax.ImpositionResponse imposition = new
commercetax.ImpositionResponse();
        imposition.setSubType('subtype');
        imposition.setType('type');
        taxDetailsResponse.setImposition(imposition);
    }

    if (request.DocumentCode == 'SetsNullForResponseWithoutException')
{
        taxDetailsResponse.setJurisdiction(null);
    } else {
        commercetax.JurisdictionResponse jurisdiction = new
commercetax.JurisdictionResponse();
        jurisdiction.setCountry('country');
        jurisdiction.setRegion('region');
        jurisdiction.setName('name');
        jurisdiction.setStateAssignedNumber('stateAssignedNo');
        jurisdiction.setId('id');
        jurisdiction.setLevel('level');
        taxDetailsResponse.setJurisdiction(jurisdiction);
    }

    taxDetailsResponses.add(taxDetailsResponse);
}
lineItemResponse.setTaxes(taxDetailsResponses);
totalTax += totalLineTax;
totalAmount += lineItem.amount;

if (request.DocumentCode == 'SetsNullForResponseWithException') {
    lineItemResponse.setAmountDetails(null);
} else {
    commercetax.AmountDetailsResponse amountResponse = new
commercetax.AmountDetailsResponse();
    amountResponse.setTotalAmountWithTax(totalTax + totalAmount);
    amountResponse.setExemptAmount(0);
    amountResponse.setTotalAmount(totalAmount);
    amountResponse.setTaxAmount(totalTax);
    lineItemResponse.setAmountDetails(amountResponse);
}
lineItemResponse.setEffectiveDate(system.now());
lineItemResponse.setTaxCode(lineItem.taxCode);
lineItemResponse.setProductCode(lineItem.ProductCode);
lineItemResponse.setLineNumber(lineItem.linenumber);
lineItemResponse.setIsTaxable(true);
lineItemResponse.setQuantity(lineItem.quantity);
if (request.DocumentCode == 'SetsNullForResponseWithoutException')
{
    lineItemResponse.setAddresses(null);
} else {
    lineItemResponse.setAddresses(addressesRes);
}
lineItemResponses.add(lineItemResponse);
}
if (request.DocumentCode == 'SetsNullForResponseWithException') {

```

```

        lineItemResponses.add(null);
    }
    if (request.documentCode == 'nolines') {
        // logic to skip adding lines to response
    } else {
        response.setLineItems(lineItemResponses);
    }
    if (request.DocumentCode == 'SetsNullForResponseWithException') {
        response.setAmountDetails(null);
    } else {
        commercetax.AmountDetailsResponse headerAmountResponse = new
commercetax.AmountDetailsResponse();
        headerAmountResponse.setTotalAmountWithTax(totalTax + totalAmount);

        headerAmountResponse.setExemptAmount(0);
        headerAmountResponse.setTotalAmount(totalAmount);
        headerAmountResponse.setTaxAmount(totalTax);
        response.setAmountDetails(headerAmountResponse);
    }
    commercetax.AddressesResponse addressesRes = new
commercetax.AddressesResponse();
    commercetax.AddressResponse addRes = new commercetax.AddressResponse();

    addRes.setLocationCode('street, city, state, country, postalCode');
    addressesRes.setShipFrom(addRes);
    addressesRes.setShipTO(addRes);
    addressesRes.setSoldTo(addRes);
    response.setAddresses(addressesRes);
    return response;
} else
    return null;
}

public static Integer getRandomInteger(Integer min, Integer max) {
    return min + (Integer.valueOf(Math.random()) * (max - min));
}

// Method to get the tax rates for the line items based on the address country
codes
private Map<String, Double> getTaxes(List<commercetax.TaxLineItemRequest>
lineItems) {
    Set<String> countryCodes = new Set<String>();
    // Collecting all unique the country codes
    for (commercetax.TaxLineItemRequest lineItem : lineItems) {
        String country = getCountryFromLineItem(lineItem);
        if (country != null) {
            countryCodes.add(country);
        }
    }
    // Query tax rates for the unique country codes and store it in a map
    Map<String, Double> countryTaxRateMap = new Map<String, Double>();
    if (!countryCodes.isEmpty()) {
        // Query the tax rate from the custom object based on the country code
        List<CountryTaxRate__c> taxRates = [

```

```

        SELECT Country_Code__c, Tax_Rate__c
        FROM CountryTaxRate__c
        WHERE Country_Code__c IN :countryCodes
    ];
    for (CountryTaxRate__c taxRate : taxRates) {
        countryTaxRateMap.put(taxRate.Country_Code__c, taxRate.Tax_Rate__c);
    }
}
return countryTaxRateMap;
}
// Method to retrieve the country for the line item
private String getCountryFromLineItem(Commercetax.TaxLineItemRequest lineItem)
{
    if (lineItem.addresses != null) {
        commercetax.TaxAddressRequest addressRequest = lineItem.addresses.shipTo;

        if (addressRequest != null && addressRequest.country != null) {
            return addressRequest.country;
        }
    }
    return null;
}

// Method to set addresses in the line item response
private void setAddresses(Commercetax.AddressesResponse addressesRes,
Commercetax.TaxLineItemRequest lineItem) {
    commercetax.LineTaxAddressesRequest addressesReq = lineItem.addresses;
    if (addressesReq == null) {
        return;
    }
    addressesRes.setShipFrom(getShipFromAddressRes(addressesReq));
    addressesRes.setShipTo(getShipToAddressRes(addressesReq));
    addressesRes.setSoldTo(getSoldToAddressRes(addressesReq));
}

private Commercetax.AddressResponse
getShipFromAddressRes(Commercetax.LineTaxAddressesRequest addressesReq) {
    return getAddressRes(addressesReq.shipFrom);
}

private Commercetax.AddressResponse
getShipToAddressRes(Commercetax.LineTaxAddressesRequest addressesReq) {
    return getAddressRes(addressesReq.shipTo);
}

private Commercetax.AddressResponse
getSoldToAddressRes(Commercetax.LineTaxAddressesRequest addressesReq) {
    if (addressesReq.soldTo != null) {
        return getAddressRes(addressesReq.soldTo);
    } else {
        return getAddressRes(addressesReq.billTo);
    }
}
}

```

```

    private commercetax.AddressResponse getAddressRes (commercetax.TaxAddressRequest
addressReq) {
    if (addressReq == null) {
        return null;
    }

    commercetax.AddressResponse addressRes = new commercetax.AddressResponse();

    List<String> addressEle = new List<String>();
    if (addressReq.street != null)
        addressEle.add(addressReq.street);
    if (addressReq.city != null)
        addressEle.add(addressReq.city);
    if (addressReq.state != null)
        addressEle.add(addressReq.state);
    if (addressReq.country != null)
        addressEle.add(addressReq.country);
    if (addressReq.postalCode != null)
        addressEle.add(addressReq.postalCode);

    addressRes.setLocationCode(String.join(addressEle, ', '));
    return addressRes;
}
}

```

- Select `StandardTaxAdapter` as the provider when you create a tax engine record in your org.

Tax Mappings for Invoices and Credits

You can extend and customize the existing tax interface by using custom metadata types and tax mappings. These customizations help you with unique business requirements such as the inclusion of specific data for accurate calculations and audits.

Here are some prerequisites before you work with the tax mappings for invoices and credits.

- See [custom metadata types](#) to specify all your tax mapping definitions.
- See [details on extension of your tax contract](#) with custom fields.
- Tax callout extensions are supported for the Invoice, Invoice Line, Invoice Line Tax, Credit Memo, Credit Memo Line, and Credit Memo Line Tax objects.

Request Mappings for Header Attributes

This table defines the request mappings between the header attributes of a tax callout and fields of applicable objects.

Header Attributes	Invoice Mapping	Negative Invoice Mapping	Credit Mapping
currencyIsoCode	Invoice.CurrencyISOCode	Invoice.CurrencyISOCode	CreditMemo.CurrencyISOCode
isCommit	If status is <code>DRAFT</code> then this value is <code>False</code> . If status is <code>POSTED</code> , then this value is <code>True</code> .	If status is <code>DRAFT</code> then this value is <code>False</code> . If status is <code>POSTED</code> , then this value is <code>True</code> .	This value is <code>True</code> until Summer '25. From Winter '26, if status is <code>DRAFT</code> , then this value is <code>False</code> and if status is

Header Attributes	Invoice Mapping	Negative Invoice Mapping	Credit Mapping
			POSTED, then this value is True.
referenceEntityId	Invoice.ID	Invoice.ID	CreditMemo.ID
taxEngineId	TaxTreatment.TaxEngine.ID	TaxTreatment.TaxEngine.ID	TaxTreatment.TaxEngine.ID
transactionDate	SystemDate	SystemDate	SystemDate
sellerDetails			
code	TaxEngine.SellerCode	TaxEngine.SellerCode	TaxEngine.SellerCode
customerDetails			
accountId	Invoice.BillingAccount.ID	Invoice.BillingAccount.ID	Invoice.BillingAccount.ID
code	NULL	NULL	NULL
exemptionNo	NULL		NULL
exemptionReason	NULL	NULL	NULL
taxType	If status is DRAFT, then this value is Estimated. If status is POSTED, then this value is Actual.	If status is DRAFT, then this value is Estimated. If status is POSTED, then this value is Actual.	This value is Actual until Summer '25. From Winter '26, if status is DRAFT, then this value is Estimated. If status is POSTED, then this value is Actual.
taxTransactionType	Debit	Credit	Credit
effectiveDate	invoice.InvoiceDate	If you're creating from negative lines, then this value is the original Invoice.InvoiceDate value.	If you're using standalone credit memo, then this value is the CreditMemo.CreditDate value.
addresses			
billTo	NULL	NULL	NULL
shipTo	NULL	NULL	NULL
shipFrom	NULL	NULL	NULL
soldTo	NULL	NULL	NULL
taxEngineAddress	TaxEngine.Address	TaxEngine.Address	TaxEngine.Address
referenceDocumentCode	NULL	If you're converting from negative lines, then this value is the original document code Invoice.ID & "Debit" & TaxEngine.ID.	If you're using standalone credit memo, then this value is NULL. Otherwise, this value is the documentCode value of the original invoice.

Header Attributes	Invoice Mapping	Negative Invoice Mapping	Credit Mapping
description	Invoice.Description	Invoice.Description	Invoice.Description
documentCode	Invoice.ID & "_Debit_" & TaxEngine.ID	Invoice.ID & "_Credit_" & TaxEngine.ID	CreditMemo.ID & "_Credit_" & TaxEngine.ID
shouldVoid	FALSE	From Winter '26, if the request is to void a posted invoice, then this value is TRUE. Else, it is FALSE.	FALSE
lineItems	Refer to the next line attributes section.	Refer to the next line attributes section.	Refer to the next line attributes section.

Request Mappings for Line Attributes

This table defines the request mappings between the line attributes of a tax callout and fields of applicable objects.

Line Attributes	Invoice Mapping	Negative Invoices	Credit Mapping
taxCode	TaxTreatment.TaxCode	TaxTreatment.TaxCode	TaxTreatment.TaxCode
productCode	TaxTreatment.ProductCode	TaxTreatment.ProductCode	TaxTreatment.ProductCode
productId	InvoiceLine.ProductId	InvoiceLine.ProductId	ProductId
amount	InvoiceLine.ChargeAmount	InvoiceLine.ChargeAmount	CreditMemoLine.ChargeAmount
effectiveDate	InvoiceLine.Invoice.InvoiceDate	If you're creating from negative lines, then this value is the original Invoice.InvoiceDate value.	CreditMemoLine.CreditMemo.CreditDate
lineNumber	InvoiceLine.ID	InvoiceLine.ID	CreditMemoLine.ID
description	InvoiceLine.Description	InvoiceLine.Description	CreditMemoLine.Description
quantity	InvoiceLine.Quantity	InvoiceLine.Quantity	NULL
addresses			
billTo	InvoiceLine.BillingAddress.Address	InvoiceLine.BillingAddress.Address	CreditMemoLine.BillingAddress.Address
shipTo	InvoiceLine.ShippingAddress.Address	InvoiceLine.ShippingAddress.Address	CreditMemoLine.ShippingAddress.Address
shipFrom	InvoiceLine.ShippingFrom.Address	InvoiceLine.ShippingFrom.Address	CreditMemoLine.ShippingFrom.Address
soldTo	NULL	NULL	NULL
productsku	InvoiceLine.Product.productCode	InvoiceLine.Product.productCode	CreditMemoLine.Product.productCode
referenceDocumentCode	NULL	If you're converting from negative lines, then this value is	If you're using standalone credit memo, then this value is NULL.

Line Attributes	Invoice Mapping	Negative Invoices	Credit Mapping
		the original Document Code - "Invoice.ID" & "Debit" & TaxEngine.ID.	Otherwise, this value is the documentCode value of the original invoice.

Response Mappings for Header Attributes

This table defines the response mappings between the header attributes of a tax callout and fields of applicable objects. This response structure is used to create the InvoiceLineTax records.

Header Attributes	Invoice Mapping	Negative Invoice Mapping	Credit Mapping
currencyIsoCode	Invoice.CurrencyISOCode	Invoice.CurrencyISOCode	CreditMemo.CurrencyISOCode
isCommit	Not persisted.	Not persisted.	Not persisted.
referenceEntityId	Invoice.ID	Invoice.ID	CreditMemo.ID
taxEngineId	TaxTreatment.TaxEngine.ID	TaxTreatment.TaxEngine.ID	TaxTreatment.TaxEngine.ID
transactionDate	SystemDate	SystemDate	SystemDate
sellerDetails			
code	TaxEngine.SellerCode	TaxEngine.SellerCode	TaxEngine.SellerCode
customerDetails			
accountId	Invoice.BillingAccount.ID	Invoice.BillingAccount.ID	Invoice.BillingAccount.ID
code	Not persisted.	Not persisted.	Not persisted.
exemptionNo	Not persisted.	Not persisted.	Not persisted.
exemptionReason	Not persisted.	Not persisted.	Not persisted.
taxType	If status is DRAFT, then this value is Estimated. If status is POSTED, then this value is Actual.	If status is DRAFT, then this value is Estimated. If status is POSTED, then this value is Actual.	Actual
taxTransactionType	Debit	Credit	Credit
effectiveDate	invoice.InvoiceDate	If you're creating from negative lines, then this value is the original Invoice.InvoiceDate value.	If you're using standalone credit memo, then this value is the CreditMemo.CreditDate value. If you're creating from negative lines, then this value is the original Invoice.InvoiceDate value.
addresses			
billTo	Not persisted.	Not persisted.	Not persisted.

Header Attributes	Invoice Mapping	Negative Invoice Mapping	Credit Mapping
shipTo	Not persisted.	Not persisted.	Not persisted.
shipFrom	Not persisted.	Not persisted.	Not persisted.
soldTo	Not persisted.	Not persisted.	Not persisted.
taxEngineAddress	Not persisted.	Not persisted.	Not persisted.
referenceDocumentCode	Not persisted.	Not persisted.	Not persisted.
description	Not persisted.	Not persisted.	Not persisted.
documentCode	Invoice.ID & "_Debit_" & TaxEngine.ID	Invoice.ID & "_Credit_" & TaxEngine.ID	CreditMemo.ID & "_Credit_" & TaxEngine.ID
status	Committed		
taxEngineLogs			
resultCode	TaxEngineInteractionLog.ResultCode	TaxEngineInteractionLog.ResultCode	TaxEngineInteractionLog.ResultCode
createddate	Not persisted.	Not persisted.	Not persisted.
Id	Not persisted.	Not persisted.	Not persisted.
transactionDate	Not persisted.	Not persisted.	Not persisted.
amountDetails			
exemptAmount	Not persisted.	Not persisted.	Not persisted.
taxAmount	Not persisted.	Not persisted.	Not persisted.
totalAmount	Not persisted.	Not persisted.	Not persisted.
totalAmountWithTax	Not persisted.	Not persisted.	Not persisted.
lineItems	Refer to the next line attributes section.	Refer to the next line attributes section.	Refer to the next line attributes section.

Response Mappings for Line Attributes

This table defines the response mappings between the line attributes of a tax callout and fields of applicable objects.

Line Attributes	Invoice Mapping	Negative Invoices	Credit Mapping
taxCode	InvoiceLineTax.taxCode	InvoiceLineTax.taxCode	InvoiceLineTax.taxCode
productCode	Not persisted.	Not persisted.	Not persisted.
productId	Not persisted.	Not persisted.	Not persisted.
amountDetails			
exemptAmount	Not persisted.	Not persisted.	Not persisted.
taxAmount	Not persisted.	Not persisted.	Not persisted.

Line Attributes	Invoice Mapping	Negative Invoices	Credit Mapping
totalAmount	Not persisted.	Not persisted.	Not persisted.
totalAmountWithTax	Not persisted.	Not persisted.	Not persisted.
effectiveDate	InvoiceLineTax.taxEffectiveDate	InvoiceLineTax.taxEffectiveDate	CreditMemoLineTax.taxEffectiveDate
lineNumber	InvoiceLineTax.InvoiceLine	InvoiceLineTax.InvoiceLine	CreditMemoLineTax.CreditMemoLine
description	Not persisted.	Not persisted.	Not persisted.
quantity	Not persisted.	Not persisted.	Not persisted.
addresses			
billTo	Not persisted.	Not persisted.	Not persisted.
shipTo	Not persisted.	Not persisted.	Not persisted.
shipFrom	Not persisted.	Not persisted.	Not persisted.
soldTo	Not persisted.	Not persisted.	Not persisted.
productsku	Not persisted.	Not persisted.	Not persisted.
referenceDocumentCode	Not persisted.	Not persisted.	Not persisted.
taxes	Refer to the next tax attributes section.	Refer to the next tax attributes section.	Refer to the next tax attributes section.

Response Mappings for Tax Attributes

This table defines the response mappings between the tax attributes of a tax callout and fields of applicable objects.

Line Attributes	Invoice Mapping	Negative Invoices	Credit Mapping
exemptAmount	InvoiceLineTax.taxExemptAmount	InvoiceLineTax.taxExemptAmount	Not persisted.
exemptReason	Not persisted.	Not persisted.	Not persisted.
imposition			
type	Not persisted.	Not persisted.	Not persisted.
Name	InvoiceLineTax.TaxName	InvoiceLineTax.TaxName	CreditMemoLineTax.TaxName
jurisdiction			
country	Not persisted.	Not persisted.	Not persisted.
id	Not persisted.	Not persisted.	Not persisted.
level	Not persisted.	Not persisted.	Not persisted.
name	Not persisted.	Not persisted.	Not persisted.
region	Not persisted.	Not persisted.	Not persisted.
stateAssignedNo	Not persisted.	Not persisted.	Not persisted.

Line Attributes	Invoice Mapping	Negative Invoices	Credit Mapping
rate	InvoiceLineTax.taxRate	InvoiceLineTax.taxRate	CreditMemoLineTax.TaxRate
tax	InvoiceLineTax.taxAmount	InvoiceLineTax.taxAmount	CreditMemoLineTax.TaxAmount
taxId	InvoiceLineTax.TaxTransactionNumber	InvoiceLineTax.TaxTransactionNumber	CreditMemoLineTax.TaxTransactionNumber
taxableAmount	Not persisted.	Not persisted.	Not persisted.

Billing Metadata API Types

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

[BillingSettings](#)

Represents the settings for Salesforce Billing.

[Flow for Billing](#)

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.

[PaymentsSharingSettings](#)

Represents the settings to enable account-based sharing to view details related to Revenue Cloud Billing on the objects for Payments and Refunds.

SEE ALSO:

[Metadata API Developer Guide: Understanding Metadata API](#)

BillingSettings

Represents the settings for Salesforce Billing.

Parent Type and Manifest Access

This type extends the [Metadata](#) metadata type and inherits its `fullName` field.

In the package manifest, all the settings metadata types for the org are accessed using the “Settings” name. See [Settings](#) for more details.

File Suffix and Directory Location

The `BillingSettings` values are stored in the `BillingSettings.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

`BillingSettings` components are available in API version 62.0 and later.

Special Access Rules

These settings are available when Billing is enabled.

Fields

Field Name	Description
acctRecGlAccount	<p>Field Type string</p> <p>Description General ledger account to record the credit amount for unrealized or realized losses and the debit amount for unrealized or realized gains in transaction journals. Available in API version 64.0 and later.</p>
billingContextDefinition	<p>Field Type string</p> <p>Description Name of the context definition that the Create Billing Schedules for Orders API uses to understand your order data. Available in API version 64.0 and later.</p>
billingContextSourceMapping	<p>Field Type string</p> <p>Description Name of the context mapping that links Order fields to billing transaction context nodes. Available in API version 64.0 and later.</p>
billingIntraCtxtSrcMapping	<p>Field Type string</p> <p>Description Name of the custom context mapping that maps your custom or standard Order fields to billing transaction context nodes. Available in API version 64.0 and later.</p>
defaultAPClosureDPEDefnName	<p>Field Type string</p> <p>Description Org-wide default value to specify the Data Processing Engine (DPE) definition to close legal entity accounting periods. Available in API version 64.0 and later.</p>
defaultApplyCreditMemoFlow	<p>Field Type string</p> <p>Description Default flow that's used to apply the credit memo to invoices. Available in API version 64.0 and later.</p>

Field Name	Description
defaultBillingTreatment	<p>Field Type string</p> <p>Description Org-wide default value to specify the name of the billing treatment. Available in API version 64.0 and later.</p>
defaultEmailTemplate	<p>Field Type string</p> <p>Description Default email template to send the generated invoice PDFs. Available in API version 64.0 and later.</p>
defaultInvPreviewTemplate	<p>Field Type string</p> <p>Description Default template to generate PDFs of invoice previews. Available in API version 64.0 and later.</p>
defaultInvoiceDocTemplate	<p>Field Type string</p> <p>Description Default template to generate PDFs of invoices. Available in API version 64.0 and later.</p>
defaultLegalEntity	<p>Field Type string</p> <p>Description Org-wide default value to specify the name of the legal entity. Available in API version 64.0 and later.</p>
defaultTaxTreatment	<p>Field Type string</p> <p>Description Org-wide default value to specify the name of the tax treatment. Available in API version 64.0 and later.</p>
enableBillingSetup	<p>Field Type boolean</p> <p>Description Indicates whether to enable Billing setting (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
enableCRMApplicationToPostedInvoices	<p>Field Type boolean</p>

Field Name	Description
	<p>Description</p> <p>Indicates whether to enable Apply Credits to Posted Invoices setting (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p> <p>This setting automates settlement of invoices through application of credits to posted invoices. The credit application level determines whether credits are automatically applied to invoices or invoice lines.</p>
<code>enableForeignExchangeTrxnJmlCreation</code>	<p>Field Type boolean</p> <p>Description</p> <p>Indicates whether to create Transaction Journal records for invoices that hold balance amounts (partially settled and not fully settled posted invoices) to record foreign exchange unrealized gains or losses during the closure activity of a legal entity accounting period. The default value is <code>false</code>. Available in API version 65.0 and later with Revenue Cloud Billing.</p>
<code>enableInvoiceEmailDelivery</code>	<p>Field Type boolean</p> <p>Description</p> <p>Indicates whether to enable Configure Email Delivery Settings (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>. Available in API version 63.0 and later with Revenue Cloud Billing.</p>
<code>enableInvoicePdfGeneration</code>	<p>Field Type boolean</p> <p>Description</p> <p>Indicates whether to enable Document Generation setting (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>. Available in API version 63.0 and later with Revenue Cloud Billing.</p>
<code>enableInvoiceSequenceService</code>	<p>Field Type boolean</p> <p>Description</p> <p>Indicates whether to mandate the application of sequence policy for posted invoices (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p> <p>If enabled, each posted invoice is assigned an invoice number. Available in API version 65.0 and later with Revenue Cloud Billing.</p>
<code>enableNegInvoiceLnConversionToCrMemoLn</code>	<p>Field Type boolean</p>

Field Name	Description
	<p>Description</p> <p>Indicates whether to enable Convert Negative Invoice Lines to Credit Memo Lines setting (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
<code>enablePaymentSchedulesAndItemsCreation</code>	<p>Field Type</p> <p>boolean</p> <p>Description</p> <p>Indicates whether to create a default payment schedule policy and payment schedule treatment (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p> <p>If enabled, payment schedules and payment schedule items are created during financial transactions such as posting of invoices. Available in API version 64.0 and later with Revenue Cloud Billing.</p>
<code>enableTransactionJournalCreation</code>	<p>Field Type</p> <p>boolean</p> <p>Description</p> <p>Indicates whether to create Transaction Journal records based on the defined general ledger account assignment rules for the billing entities when billing transaction records are created or updated (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>. Available in API version 63.0 and later with Revenue Cloud Billing.</p> <p>Billing transaction records include these transaction types.</p> <ul style="list-style-type: none"> • Invoice • Invoice Line • Invoice Line Tax • Credit Memo • Credit Memo Line • Credit Memo Line Tax • Payment • Refund • Payment Line Invoice • Payment Line Invoice Line • Credit Memo Inv Application • Credit Memo Line Invoice Line
<code>enableTransactionsApplicationToInvoices</code>	<p>Field Type</p> <p>boolean</p> <p>Description</p> <p>Indicates whether to enable Credit Application Level setting (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>

Field Name	Description
	<p>Revenue Cloud Advanced</p> <p>This setting applies balances of credit memos to invoices or balances of credit memo lines to invoice lines. For the latter, amounts and balances on the invoices are rolled-up from the related invoice lines.</p> <p>Revenue Cloud Billing</p> <p>This setting applies balances of credit memos and payments to invoices or balances of credit memo lines and payments lines to invoice lines. For the latter, amounts and balances on the invoices are rolled-up from the related invoice lines.</p>
<code>enableTxnAmountsStorageInCorpCurrency</code>	<p>Field Type boolean</p> <p>Description Indicates whether to allow conversion of amounts of the Invoice, Invoice Line, Credit Memo, and Credit Memo Line records to your corporate currency (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>. Available in API version 63.0 and later. Store the converted amounts in corporate currency-specific amount fields.</p>
<code>realisedGainGlAccount</code>	<p>Field Type string</p> <p>Description Name of the general ledger account to record realized gains in transaction journals. Available in API version 64.0 and later.</p>
<code>realisedLossGlAccount</code>	<p>Field Type string</p> <p>Description Name of the general ledger account to record realized losses in transaction journals. Available in API version 64.0 and later.</p>
<code>unrealisedGainGlAccount</code>	<p>Field Type string</p> <p>Description Name of the general ledger account to record unrealized gains in transaction journals. Available in API version 64.0 and later.</p>
<code>unrealisedLossGlAccount</code>	<p>Field Type string</p> <p>Description Name of the general ledger account to record unrealized losses in transaction journals. Available in API version 64.0 and later.</p>

Declarative Metadata Sample Definition

The following is an example of a BillingSettings component.

```
<BillingSettings xmlns="http://soap.sforce.com/2006/04/metadata">
  <enableBillingSetup>true</enableBillingSetup>
  <enableForeignExchangeTrxnJrnlCreation>true</enableForeignExchangeTrxnJrnlCreation>
  <enableInvoicePdfGeneration>true</enableInvoicePdfGeneration>
  <enableTransactionsApplicationToInvoices>true</enableTransactionsApplicationToInvoices>

  <enableCrMemoApplicationToPostedInvoices>true</enableCrMemoApplicationToPostedInvoices>

  <enableInvoiceEmailDelivery>true</enableInvoiceEmailDelivery>
  <enableInvoiceSequenceService>true</enableInvoiceSequenceService>
  <enableTransactionJournalCreation>true</enableTransactionJournalCreation>
  <enableTrxnAmountsStorageInCorpCurrency>true</enableTrxnAmountsStorageInCorpCurrency>

  <enablePaymentSchedulesAndItemsCreation>true</enablePaymentSchedulesAndItemsCreation>
</BillingSettings>
```

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>Billing</members>
    <name>Settings</name>
  </types>
  <version>65.0</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 Billing

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

FlowActionCall

Billing exposes additional actionType values for the FlowActionCall Metadata type.

Field Name	Field Type	Description
actionType	InvokableActionType (enumeration of type string)	Required. The action type. Additional valid values only for Billing include:

Field Name	Field Type	Description
		<ul style="list-style-type: none"> • <code>applyCredit</code>—Apply a credit memo or credit memo line to an invoice or invoice line, respectively. • <code>unapplyCredit</code>—Unapply a credit memo or credit memo line from an invoice or invoice line, respectively. • <code>postDraftInvoice</code>—Update the status of an invoice from <code>Draft</code> to <code>Posted</code> for a credit memo application. • <code>postDraftInvoiceBatchRun</code>—Update the status of a batch of invoices from <code>Draft</code> to <code>Posted</code> for a credit memo application. • <code>createBillingSchedulesFromBillingTransaction</code>—Create one or more billing schedules for a specified billing transaction ID. • <code>recoverBillingSchedules</code>—Recover one or more billing schedules in the <code>Error</code> or <code>Processing</code> status. • <code>generateInvoiceDocuments</code>—Asynchronously generate PDF documents for the invoices associated with an invoice batch run record that are in the <code>Draft</code> or <code>Posted</code> status. • <code>createBillingSchedulesFromTrxn</code>—Creates billing schedules for internal or external transaction records by calling the Create Standalone Billing Schedules API. • <code>unapplyPayment</code>—Unapplies a payment that's already been applied to an invoice or invoice line by crediting the amount back to the payment and the invoice or invoice line. • <code>writeOffInvoices</code>—Write off partially paid or unpaid invoices to manage pending debts and to maintain accurate financial records. This action calls the Posted Invoice List Write-Off (POST) API. • <code>assignSequences</code>—Assigns sequence pattern values to target invoice records based on the specified sequence policy. • <code>postDraftCreditMemo</code>—Post a draft credit memo to a credit memo record for review and approval.

PaymentsSharingSettings

Represents the settings to enable account-based sharing to view details related to Revenue Cloud Billing on the objects for Payments and Refunds.

Use account-based sharing to view Revenue Cloud Billing details on these objects.

- Payment
- Payment Authorization
- Payment Authorization Adjustment
- Refund
- Saved Payment Method

Parent Type and Manifest Access

This type extends the [Metadata](#) metadata type and inherits its `fullName` field.

In the package manifest, all the settings metadata types for the org are accessed using the “Settings” name. See [Settings](#) for more details.

File Suffix and Directory Location

The `PaymentsSharingSettings` values are stored in the `PaymentsSharing.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

PaymentsSharingSettings components are available in API version 64.0 and later.

Special Access Rules

If you don’t have the View All Records permission to the Payments and Refunds objects, then you can:

- View the records only when the records have a value for the `Account` field and a shared Account ID.
- Use Payment Sale API and Payment Authorization API irrespective of whether the Account ID is null or shared.
- Use Payment Capture API, Authorization Reversal API, Create Payment Refund Billing API, and Apply Refunds to Payments API only when the corresponding Authorization or Payment record has a shared Account ID.

See [Commerce Payments resources](#).

Fields

Field Name	Description
<code>delegatePaymentSharingToAccount</code>	<p>Field Type boolean</p> <p>Description Indicates whether sharing for these objects must be delegated to the corresponding Account record (<code>true</code>) or not (<code>false</code>).</p> <ul style="list-style-type: none"> • Payment • Payment Authorization • Payment Authorization Adjustment • Refund • Saved Payment Method <p>The default value is <code>false</code>. If this field's value is set to <code>true</code>, you get access to these objects based on the access you have for the Account object. For example, if you have Read access to the Account object, you get Read access to the objects for Payments and Refunds.</p> <p>For saved payment method, the sharing is delegated to merchant account instead of account if the user has Manage Saved Payment Methods user permission.</p>

Declarative Metadata Sample Definition

The following is an example of a PaymentsSharingSettings component.

```
<?xml version="1.0" encoding="UTF-8"?>
<PaymentsSharingSettings xmlns="http://soap.sforce.com/2006/04/metadata">
  <delegatePaymentSharingToAccount>true</delegatePaymentSharingToAccount>
</PaymentsSharingSettings>
```

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>PaymentsSharing</members>
    <name>Settings</name>
  </types>
  <version>65.0</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](#).

CHAPTER 11 Revenue Cloud Associated Objects

In this chapter ...

- [StandardObjectNameChangeEvent](#)
- [StandardObjectNameFeed](#)
- [StandardObjectNameHistory](#)
- [StandardObjectNameOverridingRule](#)
- [StandardObjectNameShare](#)
- Event
- Task

This section provides a list of objects associated to standard objects of Revenue Cloud with their standard fields.

Some fields may not be listed for some objects. To see the system fields for each object, see [System Fields](#) in the *Object Reference for Salesforce and Lightning Platform*.

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

StandardObjectNameChangeEvent

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

Supported Calls

`describeSObjects()`

Special Access Rules

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

Change Event Support

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

Change Event Name

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

Standard Object Change Event Name

```
<Standard_Object_Name>ChangeEvent
```

Example: `AccountChangeEvent`

Custom Object Change Event Name

```
<Custom_Object_Name>__ChangeEvent
```

Example: `MyCustomObject__ChangeEvent`

Change Event Fields

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

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

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

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

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

Event Message Example

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

```
{
  "schema": "IeRuaY6cbI_HsV8Rv1Mc5g",
  "payload": {
    "ChangeEventHeader": {
      "entityName": "Account",
      "recordIds": [
        "<record_ID>"
      ],
      "changeType": "CREATE",
      "changeOrigin": "com/salesforce/api/soap/51.0;client=SfdcInternalAPI/",
      "transactionKey": "0002343d-9d90-e395-ed20-cf416ba652ad",
      "sequenceNumber": 1,
      "commitTimestamp": 1612912679000,
      "commitNumber": 10716283339728,
      "commitUser": "<User_ID>"
    },
    "Name": "Acme",
    "Description": "Everyone is talking about the cloud. But what does it mean?",
    "OwnerId": "<Owner_ID>",
    "CreatedDate": "2021-02-09T23:17:59Z",
    "CreatedBy": "<User_ID>",
    "LastModifiedDate": "2021-02-09T23:17:59Z",
    "LastModifiedBy": "<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](#).

StandardObjectNameFeed

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

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

Supported Calls

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

Special Access Rules

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

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

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



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

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

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

Fields

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

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

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

Field	Details
InsertedById	<p>Type reference</p> <p>Properties Group, Nillable, Sort</p> <p>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 <code>InsertedBy</code> value is set to the ID of the context user.</p>
isRichText	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates whether the feed item <code>Body</code> contains rich text. If you post a rich text feed comment using SOAP API, set <code>IsRichText</code> to <code>true</code> and escape HTML entities from the body. Otherwise, the post is rendered as plain text.</p> <p>Rich text supports the following HTML tags:</p> <ul style="list-style-type: none"> • <code><p></code> Though the <code>
</code> tag isn't supported, you can use <code><p>&nbspsp;</p></code> to create lines. • <code><a></code> • <code></code> • <code><code></code> • <code><i></code> • <code><u></code> • <code><s></code> • <code></code> • <code></code> • <code></code> • <code></code> <p>The <code></code> tag is accessible only through the API and must reference files in Salesforce similar to this example: <code></code></p> <p>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.</p>
LikeCount	<p>Type int</p> <p>Properties Filter, Group, Sort</p>

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

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

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

Usage

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

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

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

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

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

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

StandardObjectNameHistory

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

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

Supported Calls

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

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

Special Access Rules

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


Fields

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

StandardObjectNameOwnerSharingRule

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

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

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

Supported Calls


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

Special Access Rules

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

Fields

Field Name	Details
<code>AccessLevel</code>	<p>Type picklist</p> <p>Properties Create, Filter, Group, Restricted picklist, Sort, Update</p> <p>Description Determines the level of access users have to records. Values are:</p> <ul style="list-style-type: none"> • Read (read only) • Edit (read/write)
<code>Description</code>	<p>Type textarea</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Description of the sharing rule. Maximum length is 1,000 characters.</p>


Field Name	Details
DeveloperName	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The unique name of the object in the API. This name can contain only underscores and alphanumeric characters and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package, and the changes are reflected in a subscriber's organization.</p> <p> Note: When creating large sets of data, always specify a unique DeveloperName for each record. If no DeveloperName is specified, performance can slow while Salesforce generates one for each record.</p>
GroupId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description ID of the source group. Records that are owned by users in the source group trigger the rule to give access.</p>
Name	<p>Type string</p> <p>Properties Create, Filter, Group, idLookup, Sort, Update</p> <p>Description Label of the sharing rule as it appears in the UI. Maximum length is 80 characters.</p>
UserOrGroupId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description ID of the user or group that you're granting access to.</p>

StandardObjectNameShare

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

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

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

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

Supported Calls

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

Special Access Rules

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

Fields

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

Field Name	Details
RowCause	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Reason that the sharing entry exists.</p>
UserOrGroupId	<p>Type reference</p> <p>Properties Create, Filter, Group, Sort</p> <p>Description ID of the user or group that has been given access to the object.</p>

Event

Represents an event in the calendar. In the user interface, event and task records are collectively referred to as activities.

 **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.

 **Note:**


- An EventRelation object can't be related to a child event, and child events don't include the invitee related list.
- `query()`, `delete()`, and `update()` aren't allowed with events related to more than one contact in API versions 25.0 and earlier.
- `create()` and `update()` aren't available for read-only fields on Lightning Experience event series.
- `upsert()` and `undelete()` aren't supported for syncing changes made to events through the API using the feature Lightning Sync.

Supported Calls


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

Fields


Field	Details
AcceptedEventInviteeIds	<p>Type JunctionIdList</p>

Field	Details
	<p>Properties Create, Update</p> <p>Description A string array of contact or lead IDs who accepted this event. This <code>JunctionIdList</code> is linked to the <code>AcceptedEventRelation</code> child relationship.</p> <p> Warning: Adding a <code>JunctionIdList</code> field name to the <code>fieldsToNull</code> property deletes all related junction records. This action can't be undone.</p>
<code>AccountId</code>	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Represents the ID of the related account. The <code>AccountId</code> is determined as follows.</p> <p>If the value of <code>whatId</code> is any of the following objects, then Salesforce uses that object's <code>AccountId</code>.</p> <ul style="list-style-type: none"> Account Opportunity Contract Custom object that's a child of Account <p>If the value of the <code>whatId</code> field is any other object, and the value of the <code>whoId</code> field is a contact object, then Salesforce uses that contact's <code>AccountId</code>. If your org uses Shared Activities, Salesforce uses the <code>AccountId</code> of the primary contact.</p> <p>Otherwise, Salesforce sets the value of the <code>AccountId</code> field to <code>null</code>.</p> <p>For information on IDs, see ID Field Type.</p> <p>This is a relationship field.</p> <p>Relationship Name Account</p> <p>Relationship Type Lookup</p> <p>Refers To Account</p>
<code>ActivityDate</code>	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Contains the event's due date if the <code>IsAllDayEvent</code> flag is set to <code>true</code>. This field is a date field with a timestamp that's always set to midnight in the Coordinated Universal Time</p>

Field	Details
	<p>(UTC) time zone. Don't attempt to alter the timestamp to account for time zone differences. Label is Due Date Only.</p> <p>This field is required in API versions 12.0 and earlier if the <code>IsAllDayEvent</code> flag is set to <code>true</code>.</p> <p>The value for this field and <code>StartDateTime</code> must match, or one of them must be <code>null</code>.</p>
<code>ActivityDateTime</code>	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Contains the event's due date if the <code>IsAllDayEvent</code> flag is set to <code>false</code>. The time portion of this field is always transferred in the Coordinated Universal Time (UTC) time zone. Translate the time portion to or from a local time zone for the user or the application, as appropriate. Label is Due Date Time.</p> <p>This field is required in API versions 12.0 and earlier if the <code>IsAllDayEvent</code> flag is set to <code>false</code>.</p> <p>The value for this field and <code>StartDateTime</code> must match, or one of them must be <code>null</code>.</p>
<code>ClientGuid</code>	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description The client globally unique identifier identifies the external API client used to create the event. Label is Client GUID.</p>
<code>CurrencyIsoCode</code>	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Available only for orgs with the multicurrency feature enabled. Contains the ISO code for any currency allowed by the organization.</p>
<code>DeclinedEventInviteeIds</code>	<p>Type JunctionIdList</p> <p>Properties Create, Update</p> <p>Description A string array of contact, lead, or user IDs who declined this event. This <code>JunctionIdList</code> is linked to the <code>DeclinedEventRelation</code> child relationship.</p>

Field	Details
	 Warning: Adding a <code>JunctionIdList</code> field name to the <code>fieldsToNull</code> property deletes all related junction records. This action can't be undone.
Description	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description Contains a text description of the event. Limit: 32,000 characters.</p>
Division	<p>Type picklist</p> <p>Properties Defaulted on create, Filter, Group, Restricted picklist, Sort</p> <p>Description A logical segment of your organization's data. For example, if your company is organized into different business units, you could create a division for each business unit, such as "North America," "Healthcare," or "Consulting." Available only if the organization has the Division permission enabled.</p>
DurationInMinutes	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Contains the event length, in minutes. Even though this field represents a temporal value, it's an integer type—not a Date/Time type.</p> <p>Required in API versions 12.0 and earlier if <code>IsAllDayEvent</code> is false.</p> <p>In API versions 13.0 and later, this field is optional, depending on the following:</p> <ul style="list-style-type: none"> • If <code>IsAllDayEvent</code> is true, you can supply a value for either <code>DurationInMinutes</code> or <code>EndDateTime</code>. Supplying values in both fields is allowed if the values add up to the same amount of time. If both fields are <code>null</code>, the duration defaults to one day. • If <code>IsAllDayEvent</code> is false, a value must be supplied for either <code>DurationInMinutes</code> or <code>EndDateTime</code>. Supplying values in both fields is allowed if the values add up to the same amount of time. <p>If the multiday event feature is enabled, then API versions 13.0 and later support values greater than 1440 for the <code>DurationInMinutes</code> field. API versions 12.0 and earlier can't access event objects whose <code>DurationInMinutes</code> is greater than 1440. For more information, see Multiday Events.</p> <p>Depending on your API version, errors with the <code>DurationInMinutes</code> and <code>EndDateTime</code> fields may appear in different places.</p> <ul style="list-style-type: none"> • Versions 38.0 and before—Errors always appear in the <code>DurationInMinutes</code> field.

Field	Details
	<ul style="list-style-type: none"> Versions 39.0 and later—If there's no value for the <code>DurationInMinutes</code> field, errors appear in the <code>EndTime</code> field. Otherwise, they appear in the <code>DurationInMinutes</code> field.
<code>EndDate</code>	<p>Type date</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Read-only. Available in API versions 46.0 and later. This field supplies the date value that appears in the <code>EndTime</code> field. This field is a date field with a timestamp that is always set to midnight in the Coordinated Universal Time (UTC) time zone.</p>
<code>EndTime</code>	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Available in API versions 13.0 and later. The time portion of this field is always transferred in the Coordinated Universal Time (UTC) time zone. Translate the time portion to or from a local time zone for the user or the application, as appropriate.</p> <p>This field is optional, depending on the following:</p> <ul style="list-style-type: none"> If <code>IsAllDayEvent</code> is true, you can supply a value for either <code>DurationInMinutes</code> or <code>EndTime</code>. Supplying values in both fields is allowed if the values add up to the same amount of time. If both fields are null, the duration defaults to one day. If <code>IsAllDayEvent</code> is false, a value must be supplied for either <code>DurationInMinutes</code> or <code>EndTime</code>. Supplying values in both fields is allowed if the values add up to the same amount of time. <p>Depending on your API version, errors with the <code>DurationInMinutes</code> and <code>EndTime</code> fields may appear in different places.</p> <ul style="list-style-type: none"> Versions 38.0 and before—Errors always appear in the <code>DurationInMinutes</code> field. Versions 39.0 and later—If there's no value for the <code>DurationInMinutes</code> field, errors appear in the <code>EndTime</code> field. Otherwise, they appear in the <code>DurationInMinutes</code> field.
<code>EventSubtype</code>	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Provides standard subtypes to facilitate creating and searching for events. This field isn't updateable.</p>

Field	Details
EventWhoIds	<p>Type JunctionIdList</p> <p>Properties Create, Update</p> <p>Description A string array of contact or lead IDs used to create many-to-many relationships with a shared event. <code>EventWhoIds</code> is available when the shared activities setting is enabled. The first contact or lead ID in the list becomes the primary <code>WhoId</code> if you don't specify a primary <code>WhoId</code>. If you set the <code>EventWhoIds</code> field to null, all entries in the list are deleted and the value of <code>WhoId</code> is added as the first entry.</p> <p> Warning: Adding a <code>JunctionIdList</code> field name to the <code>fieldsToNull</code> property deletes all related junction records. This action can't be undone.</p>
GroupEventType	<p>Type picklist</p> <p>Properties Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Read-only. Available in API versions 19.0 and later. The possible values are:</p> <ul style="list-style-type: none"> • 0 (Non-group event)—An event with no invitees. • 1 (Group event)—An event with invitees. • 2 (Proposed event)—An event created when a user requests a meeting with a contact, lead, or person account using the Salesforce user interface. When the user confirms the meeting, the proposed event becomes a group event. You can't create, edit, or delete proposed events in the API. This value is no longer used in API version 41.0 and later. • 3 (IsRecurrence2 Series Pattern)—An event representing an event series recurrence pattern in Lightning Experience.
IsAllDayEvent	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the <code>ActivityDate</code> field (<code>true</code>) or the <code>ActivityDateTime</code> field (<code>false</code>) is used to define the date or time of the event. Label is All-Day Event. See also DurationInMinutes and EndDateTime.</p>
IsArchived	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p>

Field	Details
	<p>Description</p> <p>Indicates whether the event has been archived.</p>
IsChild	<p>Type</p> <p>boolean</p> <p>Properties</p> <p>Defaulted on create, Filter, Group, Sort</p> <p>Description</p> <p>Indicates whether the event is a child of another event (<code>true</code>) or not (<code>false</code>).</p> <p>For a child event, you can update <code>IsReminderSet</code> and <code>ReminderDateTime</code> only. You can query and delete a child event. If the objects related to the child event are different from those objects related to the parent event (this difference is possible if you use API version 25.0 or earlier) and one of the objects related to the child event is deleted, the objects related to the parent event are updated to ensure data integrity.</p>
IsClientManaged	<p>Type</p> <p>boolean</p> <p>Properties</p> <p>Defaulted on create, Filter, Group, Sort</p> <p>Description</p> <p>Indicates whether the event is managed by an external client. If the value of this field is false, the event isn't owned or managed by an external client, and Salesforce can be used to update it. If the value is true, Salesforce can be used to change only noncritical fields on the event. Label is Is Client Managed.</p>
IsGroupEvent	<p>Type</p> <p>boolean</p> <p>Properties</p> <p>Defaulted on create, Filter, Group, Sort</p> <p>Description</p> <p>Indicates whether the event is a group event—that is, whether it has invitees (<code>true</code>) or not (<code>false</code>).</p>
IsPrivate	<p>Type</p> <p>boolean</p> <p>Properties</p> <p>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description</p> <p>Indicates whether users other than the creator of the event can (<code>false</code>) or can't (<code>true</code>) see the event details when viewing the event user's calendar. However, users with the View All Data or Modify All Data permission can see private events in reports and searches, or when viewing other users' calendars. Private events can't be associated with opportunities, accounts, cases, campaigns, contracts, leads, or contacts. Label is Private.</p>

Field	Details
IsRecurrence	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates whether a Salesforce Classic event is scheduled to repeat itself (<code>true</code>) or only occurs one time (<code>false</code>). This field is read-only when updating records, but not when creating them. If this field value is <code>true</code>, then <code>RecurrenceEndDateOnly</code>, <code>RecurrenceStartDateTime</code>, <code>RecurrenceType</code>, and any recurrence fields associated with the given recurrence type must be populated. Label is Create recurring series of events.</p>
IsRecurrence2	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Read-only. This field is available in API version 44.0 and later. Indicates whether a Lightning Experience event is scheduled to repeat (<code>true</code>) or only occurs one time (<code>false</code>). If this field value is <code>true</code>, then <code>Recurrence2PatternText</code> and <code>Recurrence2PatternVersion</code> must be populated. Label is Repeat.</p>
IsRecurrence2Exception	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Read-only. This field is available in API version 44.0 and later. Indicates whether an individual event in a Lightning Experience event series has a recurrence pattern that's different from the rest of the series, making it an exception.</p>
IsRecurrence2Exclusion	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Read-only. This field is available in API version 44.0 and later. Indicates when updates to a Lightning Experience event series recurrence pattern have been made, but affect future event occurrences only. For past event occurrences, <code>IsRecurrence2Exclusion</code> is set to <code>true</code>, excluding past occurrences from the series recurrence pattern.</p>
IsReminderSet	<p>Type boolean</p>


Field	Details
	<p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether the activity is a reminder (<code>true</code>) or not (<code>false</code>).</p>
IsVisibleInSelfService	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Indicates whether an event associated with an object can be viewed in the Customer Portal (<code>true</code>) or not (<code>false</code>). If your org has enabled digital experiences, events marked <code>IsVisibleInSelfService</code> are visible to any external user in the Experience Cloud site, as long as the user has access to the record the event was created on. This field is available when</p> <ul style="list-style-type: none"> • Customer Portal or partner portal is enabled <p>OR</p> <ul style="list-style-type: none"> • Digital experiences is enabled and you have Customer Portal or partner portal licenses
Location	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Contains the location of the event.</p>
OwnerId	<p>Type reference</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Contains the ID of the user or public calendar who owns the event. Label is Assigned to ID. This is a polymorphic relationship field.</p> <p>Relationship Name Owner</p> <p>Relationship Type Lookup</p> <p>Refers To Calendar, User</p>

Field	Details
Recurrence2PatternStartDate	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description Read-only. This field is available in API version 44.0 and later. Indicates the date and time when the Lightning Experience event series begins. The time portion of this field is always transferred in the Coordinated Universal Time (UTC) time zone. Translate the time portion to or from a local time zone for the user or the application, as appropriate.</p>
Recurrence2PatternText	<p>Type textarea</p> <p>Properties Create, Nillable</p> <p>Description The RRULE that describes the recurrence pattern for Lightning Experience event series. Supports a subset of the RFC 5545 standard for internet calendaring and scheduling. See the Event Series section in this topic for usage examples. This field has a maximum length of 512 characters.</p> <p>This field is available in API version 44.0 and later, and has the <code>Create</code> property in API version 52.0 and later.</p>
Recurrence2PatternTimeZone	<p>Type string</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description This field is available in API version 44.0 and later. Indicates the time zone in which the Lightning Experience event series was created or updated. This field uses standard Java TimeZone IDs. For example, America/Los_Angeles.</p>
Recurrence2PatternVersion	<p>Type picklist</p> <p>Properties Filter, Group, Nillable, Restricted picklist, Sort,</p> <p>Description Read-only. This field is available in API version 44.0 and later. Indicates the standard specifications for Lightning Experience event series recurrence patterns. The only possible value is 1 (RFC 5545 v4 RRULE)—RFC 5545 is a standard set of specifications for internet calendaring and scheduling that <code>IsRecurrence2</code> adheres to for series recurrence patterns. RFC 5545 specifications for series recurrence patterns are called RRULES. For examples of RRULE usage, see the Lightning Experience Event Series and Recurring Events section in this topic.</p>

Field	Details
RecurrenceActivityId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Read-only. Not required on create. Contains the ID of the main record of the Salesforce Classic recurring event. Subsequent occurrences have the same value in this field.</p>
RecurrenceDayOfMonth	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Indicates the day of the month on which the event repeats.</p>
RecurrenceDayOfWeekMask	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Indicates the day or days of the week on which the Salesforce Classic recurring event repeats. This field contains a bitmask. The values are as follows:</p> <ul style="list-style-type: none"> • Sunday = 1 • Monday = 2 • Tuesday = 4 • Wednesday = 8 • Thursday = 16 • Friday = 32 • Saturday = 64 <p>Multiple days are represented as the sum of their numerical values. For example, Tuesday and Thursday = 4 + 16 = 20.</p>
RecurrenceEndDateOnly	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Indicates the last date on which the event repeats. For multiday Salesforce Classic recurring events, this date is the day on which the last occurrence starts. This field is a date field with a timestamp that is always set to midnight in the Coordinated Universal Time (UTC) time zone. Don't attempt to alter the timestamp to account for time zone differences.</p>

Field	Details
RecurrenceInstance	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Indicates the frequency of the Salesforce Classic event's recurrence. For example, 2nd or 3rd.</p>
RecurrenceInterval	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Indicates the interval between Salesforce Classic recurring events.</p>
RecurrenceMonthOfYear	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Indicates the month in which the Salesforce Classic recurring event repeats.</p>
RecurrenceStartDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Indicates the date and time when the Salesforce Classic recurring event begins. The value must precede the <code>RecurrenceEndDateOnly</code>. The time portion of this field is always transferred in the Coordinated Universal Time (UTC) time zone. Translate the time portion to or from a local time zone for the user or the application, as appropriate.</p>
RecurrenceTimeZoneSidKey	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Indicates the time zone associated with a Salesforce Classic recurring event. For example, "UTC-8:00" for Pacific Standard Time.</p>
RecurrenceType	<p>Type picklist</p>

Field	Details
	<p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Indicates how often the Salesforce Classic event repeats. For example, daily, weekly, or every nth month (where “nth” is defined in <code>RecurrenceInstance</code>).</p>
ReminderDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Represents the time when the reminder is scheduled to fire, if <code>IsReminderSet</code> is set to <code>true</code>. If <code>IsReminderSet</code> is set to <code>false</code>, then the user may have deselected the reminder checkbox in the Salesforce user interface, or the reminder has already fired at the time indicated by the value.</p>
ShowAs	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Indicates how this event appears when another user views the calendar: Busy, Out of Office, or Free. Label is Show Time As.</p>
StartDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Indicates the start date and time of the event. Available in versions 13.0 and later.</p> <p>If the Event <code>IsAllDayEvent</code> flag is set to <code>true</code> (indicating that it’s an all-day Event), then the event start date information is contained in the <code>StartDateTime</code> field. The time portion of this field is always transferred in the Coordinated Universal Time (UTC) time zone. Translate the time portion to or from a local time zone for the user or the application, as appropriate.</p> <p>If the Event <code>IsAllDayEvent</code> flag is set to <code>false</code> (indicating that it isn’t an all-day event), then the event start date information is contained in the <code>StartDateTime</code> field. The time portion is always transferred in the Coordinated Universal Time (UTC) time zone. You need to translate the time portion to or from a local time zone for the user or the application, as appropriate.</p> <p>If this field has a value, then <code>ActivityDate</code> and <code>ActivityDateTime</code> must either be <code>null</code> or match the value of this field.</p>

Field	Details
Subject	<p>Type combobox</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The subject line of the event, such as Call, Email, or Meeting. Limit: 255 characters.</p>
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Indicates the event type, such as Call, Email, or Meeting.</p>
UndecidedEventInviteeIds	<p>Type JunctionIdList</p> <p>Properties Create, Update</p> <p>Description A string array of contact, lead, or user IDs who are undecided about this event. This <code>JunctionIdList</code> is linked to the <code>UndecidedEventRelation</code> child relationship.</p> <p> Warning: Adding a <code>JunctionIdList</code> field name to the <code>fieldsToNull</code> property deletes all related junction records. This action can't be undone.</p>
WhatCount	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Available if your organization has enabled Shared Activities. Represents the count of related <code>EventRelations</code> pertaining to the <code>whatId</code>. The count of the <code>whatId</code> must be 1 or less.</p>
WhatId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The <code>whatId</code> represents nonhuman objects such as accounts, opportunities, campaigns, cases, or custom objects. <code>whatIds</code> are polymorphic. Polymorphic means a <code>whatId</code> is equivalent to the ID of a related object. The label is <code>Related To ID</code>.</p> <p>This is a polymorphic relationship field.</p>

Field	Details
	<p>Relationship Name What</p> <p>Relationship Type Lookup</p> <p>Refers To Account, Accreditation, AssessmentIndicatorDefinition, AssessmentTask, AssessmentTaskContentDocument, AssessmentTaskDefinition, AssessmentTaskOrder, Asset, AssetRelationship, AssignedResource, Award, BoardCertification, BusinessLicense, BusinessMilestone, BusinessProfile, Campaign, CareBarrier, CareBarrierDeterminant, CareBarrierType, CareDeterminant, CareDeterminantType, CareDiagnosis, CareInterventionType, CareMetricTarget, CareObservation, CareObservationComponent, CarePgmProvHealthcareProvider, CarePreauth, CarePreauthItem, CareProgram, CareProgramCampaign, CareProgramEligibilityRule, CareProgramEnrollee, CareProgramEnrolleeProduct, CareProgramEnrollmentCard, CareProgramGoal, CareProgramProduct, CareProgramProvider, CareProgramTeamMember, CareProviderAdverseAction, CareProviderFacilitySpecialty, CareProviderSearchableField, CareRegisteredDevice, CareRequest, CareRequestDrug, CareRequestExtension, CareRequestItem, CareSpecialty, CareSpecialtyTaxonomy, CareTaxonomy, Case, CommSubscriptionConsent, ContactEncounter, ContactEncounterParticipant, ContactRequest, Contract, CoverageBenefit, CoverageBenefitItem, CreditMemo, DelegatedAccount, DocumentChecklistItem, EnrollmentEligibilityCriteria, HealthcareFacility, HealthcareFacilityNetwork, HealthcarePayerNetwork, HealthcarePractitionerFacility, HealthcareProvider, HealthcareProviderNpi, HealthcareProviderSpecialty, HealthcareProviderTaxonomy, IdentityDocument, Image, IndividualApplication, Invoice, ListEmail, Location, MemberPlan, Opportunity, Order, OtherComponentTask, PartyConsent, PersonLifeEvent, PlanBenefit, PlanBenefitItem, ProcessException, Product2, ProductItem, ProductRequest, ProductRequestLineItem, ProductTransfer, PurchaserPlan, ReceivedDocument, ResourceAbsence, ReturnOrder, ReturnOrderLineItem, ServiceAppointment, ServiceResource, Shift, Shipment, ShipmentItem, Solution, Visit, VisitedParty, VolunteerProject, WorkOrder, WorkOrderLineItem</p>
WhoCount	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Available to organizations that have Shared Activities enabled. Represents the count of related EventRelations pertaining to the whoId.</p>
WhoId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p>Description</p> <p>The WhoId represents a human such as a lead or a contact. WhoIds are polymorphic. Polymorphic means a WhoId is equivalent to a contact's ID or a lead's ID. The label is Name ID.</p> <p>If Shared Activities is enabled, the value of this field is the ID of the related lead or primary contact. If you add, update, or remove the WhoId field, you might encounter problems with triggers, workflows, and data validation rules that are associated with the record. The label is Name ID.</p> <p>If the JunctionIdList field is used, all whoIds are included in the relationship list.</p> <p>Beginning in API version 37.0, if the contact or lead ID in the whoId field isn't in the EventWhoIds list, no error occurs and the ID is added to the EventWhoIds as the primary WhoId. If whoId is set to null, an arbitrary ID from the existing EventWhoIds list is promoted to the primary position.</p> <p>This is a polymorphic relationship field.</p> <p>Relationship Name</p> <p>Who</p> <p>Relationship Type</p> <p>Lookup</p> <p>Refers To</p> <p>Contact, Lead</p>

Usage

Use Event to manage calendar appointments.

Querying and Filtering Events

Queries on events are denied before they time out if they involve amounts of data that are deemed too large. In such cases, the exception code `OPERATION_TOO_LARGE` is returned. If you receive `OPERATION_TOO_LARGE`, refactor your query to return or scan a smaller amount of data.

When querying for events with a specific due date, you must filter on both the `ActivityDateTime` and `ActivityDate` fields. For example to find all events with a due date of February 14, 2003, you need two filters:

- One filter with the `ActivityDate` field equal to the Coordinated Universal Time (UTC) time zone on February 14, 2003.
- One filter with the `ActivityDate` field greater than or equal to midnight on February 14, 2003 in the user's local time zone AND less than or equal to midnight on February 15, 2003 in the user's local time zone.

Alternatively, in API version 13.0 and later, you can find events with a specific due date by filtering on `StartTime`. For example, to find all events with a due date of February 14, 2003, filter with the `StartTime` greater than or equal to midnight on February 14, 2003 in the user's local time zone AND less than or equal to midnight on February 15, 2003 in the user's local time zone.

The `EventId` field of an `EventRelation` object always points to the master record. An invitee on a group event can query the `EventRelation` object to view the master record.

Multiday Events

- Multiday events are available in API version 13.0 and later. Also, in earlier versions SOQL queries don't return multiday events.

- Multiday events are enabled through the user interface from Setup by entering *Activity Settings* in the Quick Find box, then selecting **Activity Settings**.
- If the multiday event feature is enabled, then API versions 13.0 and later support values greater than 1440 for the `DurationInMinutes` field. API versions 12.0 and earlier can't access event objects whose `DurationInMinutes` is greater than 1440.
- Multiday events can't exceed 14 days.

Event Series and Recurring Events

In Lightning Experience, events with multiple occurrences are called event series, and are indicated when the `IsRecurrence2` field is set to `true`. In Salesforce Classic, events with multiple occurrences are called recurring events, and are indicated when the `IsRecurrence` field is set to `true`. Both fields can't be set to true for the same event.

- Lightning Experience event series are available in API version 44.0 and later as read-only fields. Recurrence patterns, specified by the `Recurrence2PatternText` field, are creatable in API version 52.0 and later. Salesforce Classic recurring events are available in API version 7.0 and later. In earlier versions, SOQL queries don't return any Lightning Experience event series.
- After an event is created, you can't change the values of `IsRecurrence2` or `IsRecurrence` from `true` to `false` or vice versa.
- You can't set fields associated with `IsRecurrence2` for events where `IsRecurrence` is set to `true`, or vice versa.
- For Lightning Experience event series where `IsRecurrence2` is `true`, if you'd like to delete a single or all remaining events, use the REST API call. For Salesforce Classic recurring events where `IsRecurrence` is `true`, all past and future events in the series are removed when you delete the recurring event series through the API. However, when you delete the recurring event series through the user interface, only future occurrences are removed.
- For Lightning Experience event series in API version 58.0 and later, when you change a future event, events in the entire series also change. When you change a past event, `IsRecurrence2Exception` is set to `true` and only that past event changes.
- When creating a Salesforce Classic recurring event series, the duration of the event must be 24 hours or less. When the Salesforce Classic recurring event series is created, you can extend the length of individual occurrences beyond 24 hours if Multiday events are enabled; see **Multiday Events**.
- For Salesforce Classic recurring events, `RecurrenceStartDateTime`, `RecurrenceEndDateOnly`, `RecurrenceType`, and any properties associated with the given recurrence type (see the Recurrence Field Usage for Salesforce Classic Recurring Events table) must be populated.
- When updating a Salesforce Classic recurring event series, it's not possible to update the `EventRelation` for the event series object and the `EventRelation` for the series object occurrences at the same time.
- Lightning Experience event series have no series ID, so it's not possible to locate other occurrences in the series. In Salesforce Classic recurring events, you can use `RecurrenceActivityId` to locate other occurrences.
- For both Lightning Experience event series and Salesforce Classic recurring events, when a series repeats every day, month, or year, you can only schedule occurrences one time per day, month, or year. The week option lets you schedule occurrences multiple days per week.

[Limits for Lightning Experience event series](#) and [limits for Salesforce Classic recurring events](#) also apply.

Lightning Experience Event Series and Recurring Events

Use the `Recurrence2PatternText` field to specify the recurrence pattern for Lightning Experience event series. These recurrence patterns, called reference rules or RRULES, support a subset of the RFC 5545 standards. This table includes common RRULE examples.

Recurrence Pattern	RRULE Example
Every day for five days	RRULE:FREQ=DAILY;INTERVAL=1;COUNT=5

Recurrence Pattern	RRULE Example
Every Monday, Tuesday, Wednesday, Thursday, and Friday with no end date	<code>RRULE:FREQ=WEEKLY;INTERVAL=1;BYDAY=MO,TU,WE,TH,FR</code>
Every two weeks on Monday and Friday for 10 occurrences	<code>RRULE:FREQ=WEEKLY;INTERVAL=2;BYDAY=MO,FR;COUNT=10</code>
Monthly on the first day of the month until January 1, 2020	<code>RRULE:FREQ=MONTHLY;INTERVAL=1;BYMONTHDAY=1;UNTIL=20200101T100000Z</code>
Yearly on July 4th for three years (in this example, specify the date using StartDateTime)	<code>RRULE:FREQ=YEARLY;INTERVAL=1;BYMONTH=7;BYMONTHDAY=4;COUNT=3</code>
Daily until January 1, 2022 with no end date	<code>RRULE:FREQ=DAILY;UNTIL=20220101T000000Z</code>
Every third Friday of the month with no end date	<code>RRULE:FREQ=MONTHLY;BYSETPOS=3;BYDAY=FR</code>

The RRULE defined by `Recurrence2PatternText` supports a subset of the RFC 5545 standard for internet calendaring and scheduling. Supported RRULE parts include FREQ, BYMONTH, BYMONTHDAY, BYDAY, WKST, BYSETPOS, INTERVAL, UNTIL, and COUNT.

When the event record is saved, the RRULE might be modified to follow the required format:

- The RRULE parts are placed in the following order: FREQ, BYMONTH, BYMONTHDAY, BYDAY, WKST, BYSETPOS, INTERVAL, UNTIL, and COUNT.
- Any missing default values are inserted. For example, if the RRULE doesn't include INTERVAL, then `INTERVAL=1` is added.
- The RRULE is prefaced with `RRULE :` if that preface is missing.

RRULE Part	Supported RFC 5545 Implementation
FREQ	<p>Required. Indicates the type of recurrence rule. Allowed values are:</p> <ul style="list-style-type: none"> • DAILY—supported parts include FREQ, INTERVAL, UNTIL, and COUNT. • WEEKLY—supported parts include INTERVAL, UNTIL, COUNT, BYDAY, and WKST. BYDAY is required, but can't be preceded by a number. For example, to indicate weekly on Tuesday and Thursday until September 1, 2023, use <code>RRULE:FREQ=WEEKLY;UNTIL=20230901T000000Z;BYDAY=TU,TH</code> • MONTHLY—supported patterns include: <ul style="list-style-type: none"> – BYMONTHDAY For example, to indicate monthly on the third day of the month use: <code>RRULE:FREQ=MONTHLY;BYMONTHDAY=3</code> – BYDAY and BYSETPOS For example, to indicate the last weekday of the month, use <code>RRULE:FREQ=MONTHLY;BYDAY=MO,TU,WE,TH,FR;BYSETPOS=-1</code> – BYDAY, where the BYDAY values are specified with a numeric value For example, to indicate monthly on the first Friday for 10 occurrences, use <code>RRULE:FREQ=MONTHLY;COUNT=10;BYDAY=1FR</code> • YEARLY—supported patterns include: <ul style="list-style-type: none"> – BYMONTH, BYDAY, and BYSETPOS

RRULE Part	Supported RFC 5545 Implementation
	<p>For example, to indicate every year on the second Friday of January, use RRULE : FREQ=YEARLY ; BYMONTH=1 ; BYDAY=FR ; BYSETPOS=2</p> <ul style="list-style-type: none"> - BYMONTH and BYMONTHDAY <p>For example, to indicate every year on October 31, use RRULE : FREQ=YEARLY ; BYMONTH=10 ; BYMONTHDAY=31</p> <p>For example, to create a maintenance pattern such as twice in May, and September on 7th and 15th; and one time in June/July/August on the 1st, use two RRULEs: RRULE : FREQ=MONTHLY ; BYMONTH=5 , 9 ; BYMONTHDAY=7 , 15 RRULE : FREQ=MONTHLY ; BYMONTH=6 , 7 , 8 ; BYMONTHDAY=1</p>
BYMONTH	The month. Valid values are 1 to 12.
BYMONTHDAY	The day of the month. Valid values are 1 to 31. If BYMONTHDAY is 31 and the month has fewer than 31 days, the event is created on the last day of the month.
BYDAY	<p>A comma-separated list of days of the week. Valid values are SU, MO, TU, WE, TH, FR, SA. For RRULES with yearly or monthly frequency, BYDAY must be one of:</p> <ul style="list-style-type: none"> • a single day • weekend days • weekdays • every day of the week <p>Each BYDAY value can be preceded by an integer that indicates the nth occurrence of a specific day within the monthly or yearly RRULE. Allowed values are -1, 1, 2, 3, and 4. You can't use different numbers in the BYDAY values. For example, this RRULE isn't supported: RRULE : FREQ=MONTHLY ; INTERVAL=2 ; COUNT=10 ; BYDAY=1SU , -1SU If BYDAY values are prefaced with a number, the RRULE can't include BYSETPOS.</p>
WKST	Specifies the day on which the workweek starts. Valid values are MO, TU, WE, TH, FR, SA, and SU. Default value is based on the user's locale.
BYSETPOS	<p>A comma-separated list of values that correspond to the nth occurrence within the set of recurrence instances specified by the rule. Valid values are -1, 1, 2, 3, or 4. Default value is 1.</p> <p>For example, to indicate the last weekday of the month, use: RRULE : FREQ=MONTHLY ; BYDAY=MO , TU , WE , TH , FR ; BYSETPOS=-1</p>
INTERVAL	<p>The repetition interval. Valid values are:</p> <ul style="list-style-type: none"> • an integer between 1 and 999 if FREQ=DAILY • an integer between 1 and 99 if FREQ=WEEKLY or FREQ=MONTHLY • 1 if FREQ=YEARLY <p>Default value is 1.</p>

RRULE Part	Supported RFC 5545 Implementation
UNTIL	<p>Specifies the datetime in UTC format when the recurrence rule stops. The supported format is yyyyMMddTHHmmsz, for example: 20210419T083000Z.</p> <p>An RRULE can't contain both UNTIL and COUNT. A recurring event without either UNTIL or COUNT repeats indefinitely.</p>
COUNT	<p>The number of occurrences. Allowed values are 1 to 999.</p> <p>An RRULE can't contain both UNTIL and COUNT. A recurring event without either UNTIL or COUNT repeats indefinitely.</p>
BYWEEKNO	<p>Specifies a comma-separated list of values that specify weeks of the year. Valid values are:</p> <ul style="list-style-type: none"> • 1 to 53 • -53 to -1 <p>For example, to indicate specific weeks in a year, use: RRULE : BYWEEKNO=20, -20.</p> <p>This rule part can't be used when the FREQ rule part is set to anything other than YEARLY. For example, 3 represents the third week of the year.</p> <p>Note: Assuming a Monday week start, week 53 can only occur when Thursday is January 1 or if it's a leap year and Wednesday is January 1.</p>
BYYEARDAY	<p>Specifies a comma-separated list of values that specify days of the year. Valid values are:</p> <ul style="list-style-type: none"> • 1 to 366 • -366 to -1 <p>For example, to indicate specific days in a year, use: RRULE : BYYEARDAY=1, 100, 200; or, RRULE : BYYEARDAY=1, -2.</p>

Salesforce Classic Event Series and Recurring Events

This table describes the usage of recurrence fields for Salesforce Classic recurring events. Each recurrence type must have all of its properties set. All unused properties must be set to null.

RecurrenceType Value	Properties	Example Pattern
RecursDaily	RecurrenceInterval	Every second day
RecursEveryWeekday	RecurrenceDayOfWeekMask	Every weekday - can't be Saturday or Sunday
RecursMonthly	RecurrenceDayOfMonth RecurrenceInterval	Every second month, on the third day of the month
RecursMonthlyNth	RecurrenceInterval RecurrenceInstance RecurrenceDayOfWeekMask	Every second month, on the last Friday of the month
RecursWeekly	RecurrenceInterval RecurrenceDayOfWeekMask	Every three weeks on Wednesday and Friday
RecursYearly	RecurrenceDayOfMonth RecurrenceMonthOfYear	Every March on the 26th day of the month

RecurrenceType Value	Properties	Example Pattern
RecursYearlyNth	RecurrenceDayOfWeekMask RecurrenceInstanceRecurrenceMonthOfYear	The first Saturday in every October

Attendees, Invitees, and Resources

The field `GroupEventType` indicates that event participants are included on an event. You can add a resource to an event only when the resource is available. The only attendance status that can be assigned to resources is `Accepted`. Events can't be saved when resources you've added aren't available.

JunctionIdList

To create an event using `JunctionIdList`, IDs are pulled from the related contacts and both the event and the `EventRelation` records are created in one API call. If the `EventRelation` fails, the event is rolled back because it's all done in a single API call.

```
public void createEventNew(Contact[] contacts) {
    String[] contactIds = new String[contacts.size()];
    for (int i = 0; i < contacts.size(); i++) {
        contactIds[i] = contacts[i].getID();
    }
    Event event = new Event();
    event.setSubject("New Event");
    event.setEventWhoIds(contactIds);
    SaveResult[] results = null;
    try {
        results = connection.create(new Event[] {
            task
        });
    } catch (ConnectionException ce) {
        ce.printStackTrace();
    }
}
```

Syncing Events with Lightning Sync

Attendee statuses (`Accepted` or `Maybe`, `Declined`, or `No Response`) sync from Microsoft® Exchange or Google to Salesforce, but not from Salesforce to Exchange or Google. Be wary of creating API flows that update attendee status in Salesforce for users set up to sync both ways. Eventually the original Exchange or Google status overrides the update made in Salesforce.

Shared Field-Level Security for Event and Task Objects

Metadata deployments for the Event object must include the field-level security for the Task object. Shared field-level security prevents each object from changing the field-level security of the associated object.

Metadata deployments that include field-level security for only one of either the Event or Task objects can cause field-level security changes to the other object that aren't reflected in the metadata.

- If field-level security is enabled for one object, then field-level security is enabled for both objects.
- If field-level security is disabled for one object, then it's disabled for both objects.

 **Note:** A missing entry in the metadata is treated as field-level security being disabled.

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.

EventChangeEvent (API version 44.0)

Change events are available for the object.

EventFeed (API version 20.0)

Feed tracking is available for the object.

Task

Represents a business activity such as making a phone call or other to-do items. In the user interface, Task and Event records are collectively referred to as activities.


 **Note:** Task fields related to calls are exclusive to Salesforce CRM Call Center. Also, `query()`, `delete()`, and `update()` aren't allowed with tasks related to more than one contact in API versions 23.0 and earlier.


Supported Calls

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

Fields

Field	Field Type
<code>AccountId</code>	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Represents the ID of the related Account. The <code>AccountId</code> is determined as follows.</p> <p>If the value of <code>whatId</code> is any of the following objects, then Salesforce uses that object's <code>AccountId</code>.</p> <ul style="list-style-type: none"> Account Opportunity Contract Custom object that is a child of Account <p>If the value of the <code>whatId</code> field is any other object, and the value of the <code>whoId</code> field is a Contact object, then Salesforce uses that contact's <code>AccountId</code>. (If your organization uses Shared Activities, then Salesforce uses the <code>AccountId</code> of the primary contact.)</p> <p>Otherwise, Salesforce sets the value of the <code>AccountId</code> field to <code>null</code>.</p> <p>For information on IDs, see ID Field Type.</p>

Field	Field Type
	<p>This is a relationship field.</p> <p>Relationship Name Account</p> <p>Relationship Type Lookup</p> <p>Refers To Account</p>
ActivityDate	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Represents the due date of the task. This field has a timestamp that is always set to midnight in the Coordinated Universal Time (UTC) time zone. The timestamp is not relevant; do not attempt to alter it to accommodate time zone differences. Label is Due Date.</p> <p> Note: This field can't be set or updated for a recurring task (<code>IsRecurrence</code> is <code>true</code>).</p>
CallDisposition	<p>Type string</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Represents the result of a given call, for example, "we'll call back," or "call unsuccessful." Limit is 255 characters. Not subject to field-level security, available for any user in an organization with Salesforce CRM Call Center.</p>
CallDurationInSeconds	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Duration of the call in seconds. Not subject to field-level security, available for any user in an organization with Salesforce CRM Call Center.</p>
CallObject	<p>Type string</p>

Field	Field Type
	<p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description Name of a call center. Limit is 255 characters. Not subject to field-level security, available for any user in an organization with Salesforce CRM Call Center.</p>
CallType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The type of call being answered: Inbound, Internal, or Outbound.</p>
CompletedDateTime	<p>Type dateTime</p> <p>Properties Filter, Nillable, Sort</p> <p>Description The date and time the task was saved with a Closed status.</p> <ul style="list-style-type: none"> For insert, if the task is saved with a Closed status the field is set. If the task is saved with an Open status the field is set to NULL. For update, if the task is saved with a new Closed status, the field is reset. If the task is saved with a new non-closed status, the field is reset to NULL. If the task is saved with the same closed status (that is, unchanged) there is no change to the field. <p> Note: The status is a dynamic enum. If the Closed mapping is changed it won't cause an update of existing tasks. Only new insert/update operations are affected.</p>
ConnectionReceivedId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description ID of the PartnerNetworkConnection that shared this record with your organization. This field is available if you enabled Salesforce to Salesforce.</p>
ConnectionSentId	<p>Type reference</p>

Field	Field Type
	<p>Properties Filter, Group, Nillable, Sort</p> <p>Description ID of the PartnerNetworkConnection that you shared this record with. This field is available if you enabled Salesforce to Salesforce. This field is supported using API versions earlier than 15.0. In all other API versions, this field's value is null. You can use the new PartnerNetworkRecordConnection object to forward records to connections.</p>
Description	<p>Type textarea</p> <p>Properties Create, Nillable, Update</p> <p>Description Contains a text description of the task.</p>
IsArchived	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates whether the event has been archived. The default value of this field is <code>false</code>.</p>
IsClosed	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates whether the task has been completed (<code>true</code>) or not (<code>false</code>). The default value of this field is <code>false</code>. Is only set indirectly via the <code>Status</code> picklist. Label is Closed.</p>
IsHighPriority	<p>Type boolean</p> <p>Properties Defaulted on create, Filter, Group, Sort</p> <p>Description Indicates a high-priority task. This field is derived from the <code>Priority</code> field. The default value of this field is <code>false</code>.</p>
IsRecurrence	<p>Type boolean</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort</p>

Field	Field Type
	<p>Description</p> <p>Indicates whether the task is scheduled to repeat itself (<code>true</code>) or only occurs once (<code>false</code>). The default value of this field is <code>false</code>. This field is read-only on update, but not on create. If this field value is <code>true</code>, then <code>RecurrenceStartDateOnly</code>, <code>RecurrenceEndDateOnly</code>, <code>RecurrenceType</code>, and any recurrence fields associated with the given recurrence type must be populated. See Recurring Tasks.</p>
IsReminderSet	<p>Type</p> <p>boolean</p> <p>Properties</p> <p>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description</p> <p>Indicates whether a popup reminder has been set for the task (<code>true</code>) or not (<code>false</code>). The default value of this field is <code>false</code>.</p>
IsVisibleInSelfService	<p>Type</p> <p>boolean</p> <p>Properties</p> <p>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description</p> <p>Indicates whether a task associated with an object can be viewed in the Customer Portal (<code>true</code>) or not (<code>false</code>).</p> <p>If your organization has digital experiences enabled, tasks marked <code>IsVisibleInSelfService</code> are visible to any external user in the Experience Cloud site, as long as the user has access to the record the task was created on.</p>
OwnerId	<p>Type</p> <p>reference</p> <p>Properties</p> <p>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description</p> <p>ID of the User or Group who owns the record. Label is Assigned To ID. This field accepts Groups of type Queue only.</p> <p>In the user interface, Group IDs correspond with the queue's list view names. To create or update tasks assigned to Group, use v48.0 or later.</p> <p>This is a polymorphic relationship field.</p> <p>Relationship Name</p> <p>Owner</p> <p>Relationship Type</p> <p>Lookup</p> <p>Refers To</p> <p>Group, User</p>

Field	Field Type
Priority	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Required. Indicates the importance or urgency of a task, such as high or low. The default value of this field is Normal.</p>
RecurrenceActivityId	<p>Type reference</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Read-only. Not required on create. ID of the main record of the recurring task. Subsequent occurrences have the same value in this field.</p>
RecurrenceDayOfMonth	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The day of the month in which the task repeats.</p>
RecurrenceDayOfWeekMask	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The day or days of the week on which the task repeats. This field contains a bitmask. The values are as follows:</p> <ul style="list-style-type: none"> • Sunday = 1 • Monday = 2 • Tuesday = 4 • Wednesday = 8 • Thursday = 16 • Friday = 32 • Saturday = 64 <p>Multiple days are represented as the sum of their numerical values. For example, Tuesday and Thursday = 4 + 16 = 20.</p>


Field	Field Type
RecurrenceEndDateOnly	<p>Type date</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The last date on which the task repeats. This field has a timestamp that is always set to midnight in the Coordinated Universal Time (UTC) time zone. The timestamp is not relevant; do not attempt to alter it to accommodate time zone differences.</p>
RecurrenceInstance	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The frequency of the recurring task. Possible values are:</p> <ul style="list-style-type: none"> • First—1st • Fourth—4th • Last—last • Second—2nd • Third—3rd
RecurrenceInterval	<p>Type int</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The interval between recurring tasks.</p>
RecurrenceMonthOfYear	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description The month of the year in which the task repeats.</p>
RecurrenceRegeneratedType	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p>

Field**Field Type****Description**

Represents what triggers a repeating task to repeat. Add this field to a page layout together with the `RecurrenceInterval` field, which determines the number of days between the triggering date (due date or close date) and the due date of the next repeating task in the series.

Label is **Repeat This Task**. This field has the following picklist values:

- **None**: The task doesn't repeat.
- **After due date**: The next repeating task will be due the specified number of days after the current task's due date.
- **After the task is closed**: The next repeating task will be due the specified number of days after the current task is closed.
- **(Task closed)**: This task, now closed, was opened as part of a repeating series.

 **Note**: When tasks in a series are set to repeat after their due date, Salesforce doesn't create recurrences that would have been due in the past. Instead, Salesforce keeps adding the interval until a repeated task has a due date in the future.

For example, suppose that someone sets a task to repeat three days after it's due. But, that person doesn't complete the task (mark it Closed) until five days after it's due. Instead of creating a task that's already overdue, Salesforce gives the new task a due date of tomorrow. This due date is equivalent to 6 days after the due date; two intervals of three days each.

If that person completes the repeating task (marks it Closed) before the due date, the next task is still due three days after the due date.

`RecurrenceStartDateOnly`

Type

date

Properties

Create, Filter, Group, Nillable, Sort, Update

Description

The date when the recurring task begins. Must be a date and time before `RecurrenceEndDateOnly`.

`RecurrenceTimeZoneSidKey`

Type

picklist

Properties

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


Description



The time zone associated with the recurring task. For example, "UTC-8:00" for Pacific Standard Time.

`RecurrenceType`

Type

picklist

Field	Field Type
	<p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p>Description Indicates how often the task repeats. For example, daily, weekly, or every nth month (where “nth” is defined in <code>RecurrenceInstance</code>).</p>
ReminderDateTime	<p>Type dateTime</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description Represents the time when the reminder is scheduled to fire, if <code>IsReminderSet</code> is set to <code>true</code>. If <code>IsReminderSet</code> is set to <code>false</code>, then the user may have deselected the reminder checkbox in the Salesforce user interface, or the reminder has already fired at the time indicated by the value.</p>
Status	<p>Type picklist</p> <p>Properties Create, Defaulted on create, Filter, Group, Sort, Update</p> <p>Description Required. Indicates the status of the task. The default value of this field is <code>Not Started</code>. Each predefined <code>Status</code> field implies a value for the <code>IsClosed</code> flag. To obtain picklist values, query the <code>TaskStatus</code> object.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> Completed Deferred In Progress Not Started Waiting on someone else <p> Note: This field can't be updated for recurring tasks (<code>IsRecurrence</code> is <code>true</code>).</p>
Subject	<p>Type combobox</p> <p>Properties Create, Filter, Nillable, Sort, Update</p> <p>Description The subject line of the task, such as “Call” or “Send Quote.” Limit: 255 characters.</p>
TaskSubtype	<p>Type picklist</p>

Field	Field Type
	<p>Properties Create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p>Description Provides standard subtypes to facilitate creating and searching for specific task subtypes. This field isn't updateable.</p> <p>TaskSubtype values:</p> <ul style="list-style-type: none"> • Task • Email • LinkedIn — Available in API version 56.0 and later. • List Email • Cadence • Call <p> Note: The Cadence subtype is an internal value used by Sales Engagement, and can't be set manually.</p>
TaskWhoIds	<p>Type JunctionIdList</p> <p>Properties Create, Update</p> <p>Description A string array of contact or lead IDs related to this task. This <code>JunctionIdList</code> field is linked to the <code>TaskWhoRelations</code> child relationship. <code>TaskWhoIds</code> is only available when the shared activities setting is enabled. The first contact or lead ID in the list becomes the primary <code>whoId</code> if you don't specify a primary <code>whoId</code>. If you set the <code>EventWhoIds</code> field to null, all entries in the list are deleted and the value of <code>whoId</code> is added as the first entry.</p> <p> Warning: Adding a <code>JunctionIdList</code> field name to the <code>fieldsToNull</code> property deletes all related junction records. This action can't be undone.</p>
Type	<p>Type picklist</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The type of task, such as Call or Meeting.</p>
WhatCount	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p>

Field	Field Type
	<p>Description Available to organizations that have Shared Activities enabled. Count of related TaskRelations pertaining to <code>WhatId</code>. Count of the <code>WhatId</code> must be 1 or less.</p>
WhatId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The <code>WhatId</code> represents nonhuman objects such as accounts, opportunities, campaigns, cases, or custom objects. <code>WhatIds</code> are polymorphic. Polymorphic means a <code>WhatId</code> is equivalent to the ID of a related object. The label is <code>Related To ID</code>. This is a polymorphic relationship field.</p> <p>Relationship Name What</p> <p>Relationship Type Lookup</p> <p>Refers To Account, Accreditation, AssessmentIndicatorDefinition, AssessmentTask, AssessmentTaskContentDocument, AssessmentTaskDefinition, AssessmentTaskOrder, Asset, AssetRelationship, AssignedResource, Award, BoardCertification, BusinessLicense, BusinessMilestone, BusinessProfile, Campaign, CareBarrier, CareBarrierDeterminant, CareBarrierType, CareDeterminant, CareDeterminantType, CareDiagnosis, CareInterventionType, CareMetricTarget, CareObservation, CareObservationComponent, CarePgmProvHealthcareProvider, CarePreauth, CarePreauthItem, CareProgram, CareProgramCampaign, CareProgramEligibilityRule, CareProgramEnrollee, CareProgramEnrolleeProduct, CareProgramEnrollmentCard, CareProgramGoal, CareProgramProduct, CareProgramProvider, CareProgramTeamMember, CareProviderAdverseAction, CareProviderFacilitySpecialty, CareProviderSearchableField, CareRegisteredDevice, CareRequest, CareRequestDrug, CareRequestExtension, CareRequestItem, CareSpecialty, CareSpecialtyTaxonomy, CareTaxonomy, Case, CommSubscriptionConsent, ContactEncounter, ContactEncounterParticipant, ContactRequest, Contract, CoverageBenefit, CoverageBenefitItem, CreditMemo, DelegatedAccount, DocumentChecklistItem, EnrollmentEligibilityCriteria, HealthcareFacility, HealthcareFacilityNetwork, HealthcarePayerNetwork, HealthcarePractitionerFacility, HealthcareProvider, HealthcareProviderNpi, HealthcareProviderSpecialty, HealthcareProviderTaxonomy, IdentityDocument, Image, IndividualApplication, Invoice, ListEmail, Location, MemberPlan, Opportunity, Order, OtherComponentTask, PartyConsent, PersonLifeEvent, PlanBenefit, PlanBenefitItem, ProcessException, Product2, ProductItem, ProductRequest, ProductRequestLineItem, ProductTransfer, PurchaserPlan, ReceivedDocument, ResourceAbsence, ReturnOrder, ReturnOrderLineItem, ServiceAppointment, ServiceResource, Shift, Shipment, ShipmentItem, Solution, Visit, VisitedParty, VolunteerProject, WorkOrder, WorkOrderLineItem</p>

Field	Field Type
WhoCount	<p>Type int</p> <p>Properties Filter, Group, Nillable, Sort</p> <p>Description Available to organizations that have Shared Activities enabled. Count of related TaskRelations pertaining to WhoId.</p>
WhoId	<p>Type reference</p> <p>Properties Create, Filter, Group, Nillable, Sort, Update</p> <p>Description The Whold represents a human such as a lead or a contact. Wholds are polymorphic. Polymorphic means a Whold is equivalent to a contact's ID or a lead's ID. The label is Name ID. If Shared Activities is enabled, the value of this field is the ID of the related lead or primary contact. If you add, update, or remove the Whold field, you might encounter problems with triggers, workflows, and data validation rules that are associated with the record. The label is Name ID. Beginning in API version 37.0, if the contact or lead ID in the whoId field is not in the TaskWhoIds list, no error occurs and the ID is added to the TaskWhoIds as the primary whoId. If whoId is set to null, an arbitrary ID from the existing TaskWhoIds list is promoted to the primary position. This is a polymorphic relationship field.</p> <p>Relationship Name Who</p> <p>Relationship Type Lookup</p> <p>Refers To Contact, Lead</p>

Usage

Recurring Tasks

- Recurring tasks are available in API version 16.0 and later.
- After a task is created, it can't be changed from recurring to nonrecurring or vice versa.
- When a user creates a series of recurring tasks, Salesforce creates a main record and subsequent occurrences. For the main record, `IsRecurrence` is set to `true` and other fields that define the recurrence pattern are populated. The ID of the main record of the recurring task is saved in the subsequent occurrences, in the `RecurrenceActivityId` field.

- When you delete a recurring task series through the API, all open and closed task occurrences in the series are removed. However, when you delete a recurring task series through the user interface, only open task occurrences (`IsClosed` is `false`) in the series are removed.
- If `IsRecurrence` is `true`, then `RecurrenceStartDateOnly`, `RecurrenceEndDateOnly`, `RecurrenceType`, and any properties associated with the given recurrence type (see the following table) must be populated.
- When you change the `RecurrenceStartDateOnly` field or the recurrence pattern, all open task occurrences in the series are deleted and new open task occurrences are created based on the new recurrence pattern. The following fields determine the recurrence pattern: `RecurrenceType`, `RecurrenceTimeZoneSidKey`, `RecurrenceInterval`, `RecurrenceDayOfWeekMask`, `RecurrenceDayOfMonth`, `RecurrenceInstance`, and `RecurrenceMonthOfYear`.
- When you change the value of `RecurrenceEndDateOnly` to an earlier date (for example, from January 20 to January 10), all open task occurrences in the series with the `ActivityDate` value greater than the new end date value are deleted. Other open and closed task occurrences in the series are not affected.
- When you change the value of `RecurrenceEndDateOnly` to a later date (for example, from January 10 to January 20), new task occurrences are created up to the new end date. Existing open and closed tasks in the series are not affected.

This table describes the usage of recurrence fields for Salesforce Classic recurring events. Each recurrence type must have all of its properties set. All unused properties must be set to null.

RecurrenceType Value	Properties	Example Pattern
RecursDaily	RecurrenceInterval	Every second day
RecursEveryWeekday	RecurrenceDayOfWeekMask	Every weekday - can't be Saturday or Sunday
RecursMonthly	RecurrenceDayOfMonth RecurrenceInterval	Every second month, on the third day of the month
RecursMonthlyNth	RecurrenceInterval RecurrenceInstance RecurrenceDayOfWeekMask	Every second month, on the last Friday of the month
RecursWeekly	RecurrenceInterval RecurrenceDayOfWeekMask	Every three weeks on Wednesday and Friday
RecursYearly	RecurrenceDayOfMonth RecurrenceMonthOfYear	Every March on the 26th day of the month
RecursYearlyNth	RecurrenceDayOfWeekMask RecurrenceInstance RecurrenceMonthOfYear	The first Saturday in every October

JunctionIdList

The `JunctionIdList` field is now implemented in the Event and Task objects. With a single API call, it's easy to create many-to-many relationships between the Event or Task object with contacts, leads, or users.

To create a Task with related Contacts without `JunctionIdList`, you first have to create the task, then use the returned task ID to create the `TaskRelation` records. If the `TaskRelation` save call fails, error handling is your responsibility because the task has already been committed to the database.

```
public void createTasksOld(Contact[] contacts) {
    Task task = new Task();
    task.setSubject("New Task");
    SaveResult[] results = null;
```

```

try {
    results = connection.create(new Task[] {
        task
    });
    if (results[0].isSuccess()) {
        TaskRelation[] relations = new TaskRelation[contacts.size()];
        for (int i = 0; i < contacts.length; i++) {
            relations[i] = new TaskRelation();
            relations[i].setTaskId(results[0].getID());
            relations[i].setRelationId(contacts[i].getID());
        }
        results = connection.create(relations);
    }
} catch (ConnectionException ce) {
    ce.printStackTrace();
}
}

```

To create a task using `JunctionIdList`, IDs are pulled from the related contacts and both the task and the `TaskRelation` records are created in one API call. If the `TaskRelation` fails, the task is rolled back because it's all done in a single API call.

```

public void createTaskNew(Contact[] contacts) {
    String[] contactIds = new String[contacts.size()];
    for (int i = 0; i < contacts.size(); i++) {
        contactIds[i] = contacts[i].getID();
    }
    Task task = new Task();
    task.setSubject("New Task");
    task.setTaskWhoIds(contactIds);
    SaveResult[] results = null;
    try {
        results = connection.create(new Task[] {
            task
        });
    } catch (ConnectionException ce) {
        ce.printStackTrace();
    }
}

```

Shared Field-Level Security for Event and Task Objects

Metadata deployments for the Task object should always include the field-level security for the Event object. Shared field-level security prevents each object from changing the field-level security of the associated object.

Metadata deployments that include field-level security for only one of either the Event or Task objects can cause field-level security changes to the other object that aren't reflected in the metadata.

- If field-level security is enabled for one object, then field-level security is enabled for both objects.
- If field-level security is disabled for one object, then it's disabled for both objects.

 **Note:** A missing entry in the metadata is treated as field-level security being disabled.

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.

TaskChangeEvent (API version 44.0)

Change events are available for the object.

TaskFeed (API version 20.0)

Feed tracking is available for the object.