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# Channel Revenue Management Developer Guide

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# CHANNEL PARTNER INVENTORY TRACKING

Track channel partner inventory based on sales and resale data. Leverage point-of-sale data to calculate partner inventory and improve downstream processes, such as ship and debit claims and price protection.

Available in: **Enterprise**, **Professional**, and **Unlimited** Editions with the Channel Revenue Management add on

## [Channel Partner Inventory Tracking Standard Objects](#)

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

## [Channel Partner Inventory Tracking Metadata API Types](#)

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

## Channel Partner Inventory Tracking Standard Objects

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

### EDITIONS

Available in: Lightning Experience

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

### [AccountLeadTime](#)

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

### [PartnerStagedData](#)

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

### [PartnerUnsoldInvLedger](#)

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

### [PartnerUnsoldInventory](#)

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

### [PtnrlInvitmRecon](#)

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

### [PtnrlInvitmReconTrace](#)

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

**PtnrlInvRecon**

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

**TransitTime**

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

**Rebate Management Object in Channel Partner Inventory Tracking**

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

## AccountLeadTime

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

## Supported Calls

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

## Fields

Field	Details
AccountId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> Required. Represents the account associated with this specific lead time record. This field is a relationship field.</p> <p><b>Relationship Name</b> Account</p> <p><b>Refers To</b> Account</p>
CurrencyIsoCode	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nullable, Restricted picklist, Sort, Update</p> <p><b>Description</b> Specifies the currency ISO code for the currency fields. Possible values are:</p>

Field	Details
	<ul style="list-style-type: none"> <li>INR—Indian Rupee</li> <li>KWD—Kuwaiti Dinar</li> <li>USD—U.S. Dollar</li> </ul> <p>The default value is USD.</p>
Duration	<p><b>Type</b> int</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> Required. The time taken for the inventory to be shipped from the source to the destination.</p>
DurationType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> Required. Specifies how the duration is measured. Possible values are:           <ul style="list-style-type: none"> <li>Days</li> <li>Months</li> <li>Weeks</li> </ul>           The default value is Days.</p>
LeadTimeType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> Required. Specifies the purpose of the lead time, such as transit, service, or fulfillment, for this record. Possible values are:           <ul style="list-style-type: none"> <li>Service</li> <li>Transit</li> </ul>           The default value is Transit.</p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort</p>

Field	Details
	<p><b>Description</b> The name of the account lead time record.</p>
OwnerId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> The owner of the account lead time record. This field is a polymorphic relationship field.</p> <p><b>Relationship Name</b> Owner</p> <p><b>Refers To</b> Group, User</p>
Status	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> Required. Specifies the status of the record. Possible values are:           <ul style="list-style-type: none"> <li>• Active</li> <li>• Inactive</li> </ul>           The default value is Active.         </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.

### [AccountLeadTimeHistory on page 348](#)

History is available for tracked fields of the object.

### [AccountLeadTimeOwnerSharingRule on page 349](#)

Sharing rules are available for the object.

### [AccountLeadTimeShare on page 351](#)

Sharing is available for the object.

## PartnerStagedData

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

### Supported Calls

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

### Fields

Field	Details
AccountId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nullable, Sort, Update</p> <p><b>Description</b> The account ID of the partner that shares the data. This field is a relationship field.</p> <p><b>Relationship Name</b> Account</p> <p><b>Refers To</b> Account</p>
AccountName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nullable, Sort, Update</p> <p><b>Description</b> The account name of the partner that shares the data.</p>
ActivityDate	<p><b>Type</b> date</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> Required. The activity date for the partner staged data record, such as a transaction date or an inventory reported as of date.</p>
CurrencyIsoCode	<p><b>Type</b> picklist</p>

Field	Details
	<p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> Specifies the currency ISO code for the currency fields. Possible values are:</p> <ul style="list-style-type: none"> <li>• INR—Indian Rupee</li> <li>• KWD—Kuwaiti Dinar</li> <li>• USD—U.S. Dollar</li> </ul> <p>The default value is USD.</p>
ExternalRecordIdentifier	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The identifier for the partner staged data record in an external system.</p>
LocationId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The location ID that's associated with the partner staged data record. This field is a relationship field.</p> <p><b>Relationship Name</b> Location</p> <p><b>Refers To</b> Location</p>
LocationName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The location name that's associated with the partner staged data record.</p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort</p>

Field	Details
	<p><b>Description</b> The name of the partner staged data record.</p>
OwnerId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> The name of the location that's associated with the partner staged data record. This field is a polymorphic relationship field.</p> <p><b>Relationship Name</b> Owner</p> <p><b>Refers To</b> Group, User</p>
ProductId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The product ID associated with the partner staged data record. This field is a relationship field.</p> <p><b>Relationship Name</b> Product</p> <p><b>Refers To</b> Product2</p>
ProductName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The name of the product that's associated with the partner staged data record.</p>
Quantity	<p><b>Type</b> double</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The quantity of the product in a sale transaction or an inventory report.</p>

Field	Details
ResalePrice	<p><b>Type</b> currency</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The price at which a partner sells a product to a customer.</p>
SalePrice	<p><b>Type</b> currency</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The price at which a manufacturer sells a product to a partner.</p>
Status	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> Required. Specifies the status of the partner staged data record. Possible values are:<ul style="list-style-type: none"> <li>• Failed</li> <li>• New</li> <li>• Processed</li> </ul>The default value is New.</p>
StatusMessage	<p><b>Type</b> textarea</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> A message with the details of the partner stage data record's status.</p>
Type	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> Required. The type of the partner staged data record. Possible values are:</p>

Field	Details
	<ul style="list-style-type: none"> <li>• PartnerReportedInventoryDocument</li> <li>• PointOfSaleDocument</li> <li>• PointOfSaleReturnDocument</li> <li>• SaleDocument</li> </ul> <p>The default value is SaleDocument.</p>
UsageType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> Required. The usage type of the partner staged data record.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• ChannelRevenueManagement</li> </ul> <p>The default value is ChannelRevenueManagement.</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.

### [PartnerStagedDataHistory on page 348](#)

History is available for tracked fields of the object.

### [PartnerStagedDataOwnerSharingRule on page 349](#)

Sharing rules are available for the object.

### [PartnerStagedDataShare on page 351](#)

Sharing is available for the object.

## PartnerUnsoldInvLedger

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

## Supported Calls

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

## Fields

Field	Details
AvailableDate	<p><b>Type</b> date</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Specifies the date the unsold inventory was made available.</p>
Comment	<p><b>Type</b> textarea</p> <p><b>Properties</b> Create, Nillable, Update</p> <p><b>Description</b> Specifies the details of the ledger entry.</p>
CurrencyIsoCode	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> Specifies the currency ISO code for the currency fields.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>INR—Indian Rupee</li> <li>KWD—Kuwaiti Dinar</li> <li>USD—U.S. Dollar</li> </ul> <p>The default value is USD.</p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p><b>Description</b> The name of the partner unsold inventory ledger record.</p>
PartnerUnsoldInventoryId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> Specifies the unsold quantity of inventory available with the partner.</p>

Field	Details
	<p>This field is a relationship field.</p> <p><b>Relationship Name</b> PartnerUnsoldInventory</p> <p><b>Relationship Type</b> Master-detail</p> <p><b>Refers To</b> PartnerUnsoldInventory (the master object)</p>
Quantity	<p><b>Type</b> double</p> <p><b>Properties</b> Create, Filter, Sort</p> <p><b>Description</b> Required. Specifies the quantity of unsold inventory being used.</p>
RebateClaimConsumedQuantity	<p><b>Type</b> double</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> Specifies the quantity of the partner unsold inventory ledger that's consumed to calculate a rebate claim's amount.</p>
RebateClaimId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Specifies the rebate claim ID for the point of sale that's associated with the partner unsold inventory ledger.</p> <p>This field is a relationship field.</p> <p><b>Relationship Name</b> RebateClaim</p> <p><b>Refers To</b> RebateClaim</p>
SourceType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort</p>

Field	Details
	<p><b>Description</b>          Specifies the type of source for creating the ledger record.          Possible values are:</p> <ul style="list-style-type: none"> <li>• ManualAdjustment</li> <li>• PartnerReturn</li> <li>• PointOfSale</li> <li>• PointOfSaleReturn</li> <li>• PriceProtection</li> <li>• SaleDocument</li> </ul>
Status	<p><b>Type</b>          picklist</p> <p><b>Properties</b>          Create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b>          Required. Specifies the status of the ledger entry.          Possible values are:</p> <ul style="list-style-type: none"> <li>• Approved</li> <li>• InTransit</li> <li>• Moved</li> <li>• OnHold</li> <li>• Rejected</li> </ul>
TransactionDate	<p><b>Type</b>          date</p> <p><b>Properties</b>          Create, Filter, Group, Sort</p> <p><b>Description</b>          Required. Specifies the date of the transaction.</p>
TransactionReferenceId	<p><b>Type</b>          reference</p> <p><b>Properties</b>          Create, Filter, Group, Nillable, Sort</p> <p><b>Description</b>          Required. Specifies the reference to the transaction that decides whether the transaction is debit or credit.          This field is a polymorphic relationship field.</p> <p><b>Relationship Name</b>          TransactionReference</p>

Field	Details
	<p><b>Refers To</b> PartnerUnsoldInventory, PriceProtectExecLineItem, PtnrInvitmRecon, TransactionJournal</p>
TransactionType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Restricted picklist, Sort</p> <p><b>Description</b> Required. Specifies whether the transaction type is debit or credit. Possible values are:</p> <ul style="list-style-type: none"> <li>• Credit</li> <li>• Debit</li> </ul>
TransitDrtnReferenceRecordId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The transit duration for inventory movement between locations. This field is a polymorphic relationship field.</p> <p><b>Relationship Name</b> TransitDrtnReferenceRecord</p> <p><b>Refers To</b> AccountLeadTime, TransitTime</p>
UnitPrice	<p><b>Type</b> currency</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> Specifies the per unit price of the unsold inventory.</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.

### [PartnerUnsoldInvLedgerHistory on page 348](#)

History is available for tracked fields of the object.

## PartnerUnsoldInventory

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

### Supported Calls

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

### Fields

Field	Details
AccountId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> Required. The ID of the partner or the distributor account for which the sale has happened.</p> <p><b>Relationship Name</b> Account</p> <p><b>Refers To</b> Account</p>
CurrencyIsoCode	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> Specifies the currency ISO code for the currency fields. Possible values are:<ul style="list-style-type: none"> <li>• INR—Indian Rupee</li> <li>• KWD—Kuwaiti Dinar</li> <li>• USD—U.S. Dollar</li> </ul>The default value is USD.</p>
ExecutionReferenceNumber	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p><b>Description</b> The unique execution reference number for the unsold inventory.</p>

Field	Details
InTransitQuantity	<p><b>Type</b> double</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The inventory quantity that's currently in transit. This field is a calculated field.</p>
LocationId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The location of partner to which this sale is received. This field is a relationship field.</p> <p><b>Relationship Name</b> Location</p> <p><b>Refers To</b> Location</p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p><b>Description</b> The name of the partner unsold inventory record.</p>
OnHoldCreditQuantity	<p><b>Type</b> double</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The inventory quantity that's on hold for being credited. This quantity is a sum of the quantity of all related partner unsold inventory ledgers with the Credit transaction type and the On Hold status. This field is a calculated field.</p>
OnHoldQuantity	<p><b>Type</b> double</p> <p><b>Properties</b> Filter, Nillable, Sort</p>

Field	Details
	<p><b>Description</b>            The quantity of inventory kept on hold for a product that has been ordered but not yet shipped.            This field is a calculated field.</p>
OrigUnsoldInventoryValue	<p><b>Type</b>            currency</p> <p><b>Properties</b>            Filter, Nillable, Sort</p> <p><b>Description</b>            The total value of the original quantity of unsold units that's calculated by multiplying the original number of unsold units with the unit price.            This field is a calculated field.</p>
OriginalQuantity	<p><b>Type</b>            double</p> <p><b>Properties</b>            Create, Filter, Sort</p> <p><b>Description</b>            Required. The total value of the original quantity.</p>
OwnerId	<p><b>Type</b>            reference</p> <p><b>Properties</b>            Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b>            The ID of the user or group that owns the partner unsold inventory record.            This field is a polymorphic relationship field.</p> <p><b>Relationship Name</b>            Owner</p> <p><b>Refers To</b>            Group, User</p>
PriceProtectionExpiryDate	<p><b>Type</b>            date</p> <p><b>Properties</b>            Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b>            The date from when the price protection option expires for the inventory.</p>

Field	Details
PriceProtectionStartDate	<p><b>Type</b> date</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> <b>The date from when the price protection option is valid for the inventory.</b></p>
PriceType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> Required. The type of price at which the item is sold. Possible values are: <ul style="list-style-type: none"> <li>• ContractPrice</li> <li>• ListPrice</li> </ul> </p>
ProcessingStatus	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The asynchronous processing status, which is used to determine the eligibility for price protection. Possible values are: <ul style="list-style-type: none"> <li>• Error</li> <li>• Processed</li> </ul> </p>
ProcessingStatusReason	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The reason for the status of the asynchronous process.</p>
ProductId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The ID of the product that is being sold.</p>

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

Field	Details
	<p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The total value of the leftover quantity of unsold units that's calculated by multiplying the number of leftover unsold units with the unit price. This field is a calculated field.</p>
ShipAndDebitPgmEndDate	<p><b>Type</b> date</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The date when the ship and debit program ends.</p>
ShipAndDebitPgmStartDate	<p><b>Type</b> date</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The date when the ship and debit program starts.</p>
SourcePartnerUnsoldInvId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The source partner unsold inventory record that's used to create a new partner unsold inventory record containing the updated product price. This field is a relationship field.</p> <p><b>Relationship Name</b> SourcePartnerUnsoldInv</p> <p><b>Refers To</b> PartnerUnsoldInventory</p>
TotalRebateClaimConsumedQty	<p><b>Type</b> double</p> <p><b>Properties</b> Filter, Nillable, Sort</p>

Field	Details
	<p><b>Description</b> The total quantity of the partner unsold inventory that's consumed to calculate amounts of rebate claims. It's the sum of the rebate claim consumed quantities of the partner unsold inventory ledgers that are related to a partner unsold inventory.</p> <p>This field is a calculated field.</p>
TransactionDate	<p><b>Type</b> date</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The transaction date of the sale.</p>
TransactionReferenceId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The reference ID for the credit transaction to the partner.</p> <p>This field is a polymorphic relationship field.</p> <p><b>Relationship Name</b> TransactionReference</p> <p><b>Refers To</b> TransactionJournal</p>
UnitPrice	<p><b>Type</b> currency</p> <p><b>Properties</b> Create, Filter, Sort, Update</p> <p><b>Description</b> <b>Required.</b> The price at which the product is sold.</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.

### [PartnerUnsoldInventoryHistory on page 348](#)

History is available for tracked fields of the object.

### [PartnerUnsoldInventoryOwnerSharingRule on page 349](#)

Sharing rules are available for the object.

**PartnerUnsoldInventoryShare on page 351**

Sharing is available for the object.

**PtnrInvitmRecon**

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

**Supported Calls**

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

**Fields**

Field	Details
AccountId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> Required. The account of the partner whose inventory is reconciled. This field is a relationship field.</p> <p><b>Relationship Name</b> Account</p> <p><b>Refers To</b> Account</p>
CurrencyIsoCode	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> Specifies the currency ISO code for the currency fields. Possible values are:           <ul style="list-style-type: none"> <li>INR—Indian Rupee</li> <li>KWD—Kuwaiti Dinar</li> <li>USD—U.S. Dollar</li> </ul>           The default value is USD.</p>
ExecutionReferenceNumber	<p><b>Type</b> string</p>

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

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

Field	Details
	<p><b>Description</b>            The record that's the source of the partner inventory item reconciliation.            This field is a polymorphic relationship field.</p>
	<p><b>Relationship Name</b>            SourceReferenceRecord</p>
	<p><b>Refers To</b>            PartnerStagedData</p>
Status	<p><b>Type</b>            picklist</p> <p><b>Properties</b>            Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b>            Specifies the status of the partner inventory item reconciliation.            Possible values are:<ul style="list-style-type: none"> <li>• Closed</li> <li>• InProgress</li> <li>• New</li> </ul>           The default value is New.</p>
TotalUnsoldQuantity	<p><b>Type</b>            double</p> <p><b>Properties</b>            Filter, Nullable, Sort</p> <p><b>Description</b>            The total unsold quantity of a product in the partner's inventory that's calculated based on the partner's sales transactions. The total unsold quantity is a sum of the unsold quantity in all partner inventory item reconciliation traceability associated with the partner inventory item reconciliation.            This field is a calculated field.</p>
UnitPrice	<p><b>Type</b>            currency</p> <p><b>Properties</b>            Create, Filter, Sort, Update</p> <p><b>Description</b>            The unit price of the product for which the partner's inventory is reconciled.</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.

### [PtnrlInvitmReconHistory](#) on page 348

History is available for tracked fields of the object.

## PtnrlInvitmReconTrace

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

## Supported Calls

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

## Fields

Field	Details
CurrencyIsoCode	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> Specifies the currency ISO code for the currency fields.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>INR—Indian Rupee</li> <li>KWD—Kuwaiti Dinar</li> <li>USD—U.S. Dollar</li> </ul> <p>The default value is USD.</p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p><b>Description</b> <b>The name of the partner's inventory.</b></p>
PartnerUnsoldInventoryId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p>

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

### [PtnrlInvItmReconTraceHistory on page 348](#)

History is available for tracked fields of the object.

## PtnrlInvRecon

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

## Supported Calls

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

## Fields

Field	Details
AccountId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> Required. The account ID of the partner whose inventory is reconciled. This field is a relationship field.</p> <p><b>Relationship Name</b> Account</p> <p><b>Refers To</b> Account</p>
CurrencyIsoCode	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> Specifies the currency ISO code for the currency fields. Possible values are:           <ul style="list-style-type: none"> <li>INR—Indian Rupee</li> <li>KWD—Kuwaiti Dinar</li> <li>USD—U.S. Dollar</li> </ul>           The default value is USD.</p>
ExecutionReferenceNumber	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p><b>Description</b> A reference number in an execution process, such as a data processing engine defintion, that's used to match the partner inventory reconciliaiton with its related partner inventory item reconciliations.</p>

Field	Details
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p><b>Description</b> The name of the partner inventory reconciliation record.</p>
OwnerId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> The ID of the user or group that owns the partner inventory reconciliation record. This field is a polymorphic relationship field.</p> <p><b>Relationship Name</b> Owner</p> <p><b>Refers To</b> Group, User</p>
ReportedAsOfDate	<p><b>Type</b> date</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> Required. The date as of which the partner reported their inventory.</p>
Status	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Specifies the status of the partner inventory reconciliation. Possible values are:</p> <ul style="list-style-type: none"> <li>• Closed</li> <li>• In Progress</li> <li>• New</li> </ul>

## TransitTime

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

### Supported Calls

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

### Fields

Field	Details
CurrencyIsoCode	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> Specifies the currency ISO code for the currency fields. Possible values are:</p> <ul style="list-style-type: none"> <li>• INR—Indian Rupee</li> <li>• KWD—Kuwaiti Dinar</li> <li>• USD—U.S. Dollar</li> </ul> <p>The default value is USD.</p>
DestinationLocationId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> Required. The location to which inventory is shipped. This field is a relationship field.</p> <p><b>Relationship Name</b> DestinationLocation</p> <p><b>Refers To</b> Location</p>
Duration	<p><b>Type</b> int</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p>

Field	Details
	<p><b>Description</b> Required. The estimated time taken for the inventory to move from the source location to the destination location.</p>
DurationType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> Required. Specifies how the duration is measured.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>Days</li> <li>Months</li> <li>Weeks</li> </ul> <p>The default value is Days.</p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p><b>Description</b> The name of the transit time record.</p>
OwnerId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> The owner of the transit time record.</p> <p>This field is a polymorphic relationship field.</p> <p><b>Relationship Name</b> Owner</p> <p><b>Refers To</b> Group, User</p>
SourceLocationId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> Required. The location from which inventory is shipped.</p>

Field	Details
	<p>This field is a relationship field.</p> <p><b>Relationship Name</b> SourceLocation</p> <p><b>Refers To</b> Location</p>
Status	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> Required. Specifies the status of the transit time record.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• Active</li> <li>• Inactive</li> </ul> <p>The default value is Active.</p>
UsageType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> Required. Specifies the process, feature, or application that uses the record.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• ChannelPartnerInventory</li> </ul> <p>The default value is ChannelPartnerInventory.</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.

### [TransitTimeShare on page 351](#)

Sharing is available for the object.

## Rebate Management Object in Channel Partner Inventory Tracking

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

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

- [TransactionJournal on page 209](#)

# Channel Partner Inventory Tracking Metadata API Types

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

## [Flow for Channel Revenue Management](#)

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

## [Settings](#)

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

## Flow for Channel Revenue Management

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

## FlowActionCall

Channel Revenue Management exposes additional `actionType` values for the `FlowActionCall` Metadata type. For more information on Flow and `FlowActionCall` Metadata Type, see [Flow](#).

Field Name	Field Type	Description
<code>actionType</code>	<code>InvokeableActionType</code> (enumeration of type string)	Required. The action type. Additional valid values only for Channel Revenue Management include: <ul style="list-style-type: none"><li>• <code>adjustPartnerInvShipAndDebit</code>— Adjusts the point of sale during ship and debit claim processing to a different partner unsold inventory. Available in API version 64.0 and later.</li><li>• <code>adjustPartnerUnsoldInventory</code>— Adjusts the partner unsold inventory quantities and prices. Available in API version 64.0 and later.</li></ul>

## Settings

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

### [IndustriesChannelPartnerInventorySettings](#)

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

## IndustriesChannelPartnerInventorySettings

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

### Parent Type and Manifest Access

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

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

### File Suffix and Directory Location

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

### Version

`IndustriesChannelPartnerInventorySettings` components are available in API version 63.0 and later.

### Fields

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

### Declarative Metadata Sample Definition

The following is an example of an `IndustriesChannelPartnerInventorySettings` component.

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

    <enableChannelPartnerInventoryTracking>true</enableChannelPartnerInventoryTracking>
</IndustriesChannelPartnerInventorySettings>
```

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>IndustriesChannelPartnerInventorySettings</members>
        <name>Settings</name>
    </types>
    <version>63.0</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](#).

# DESIGN REGISTRATION

Enable partners to register designs and capture key details through the vendor portal for improved sales visibility. Allow channel managers to review and approve submissions to track partner contributions and increase accountability.

Available in: **Enterprise**, **Professional**, and **Unlimited** Editions with the Channel Revenue Management add on

## Design Registration Standard Objects

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

## Design Registration Standard Objects

### EDITIONS

Available in: Lightning Experience

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

#### Account

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

#### DealIndirectPartner

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

#### Lead

Represents a prospect or lead.

#### Opportunity

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

#### OpportunityLineItem

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

#### Pricebook2

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

#### Product2

Represents a product that your company sells.

#### Rebate Management Object in Design Registration

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

## Account

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

### Supported Calls

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

### Special Access Rules

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

## Fields

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

Field Name	Details
	<p><b>Refers To</b> ActivityMetric</p>
ActivityMetricRollupId	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> When Einstein Activity Capture with Activity Metrics is enabled, the ID of the related activity metric rollup. This field is a relationship field.</p> <p><b>Relationship Name</b> ActivityMetricRollup</p> <p><b>Refers To</b> ActivityMetricRollup</p>
AnnualRevenue	<p><b>Type</b> currency</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> Estimated annual revenue of the account.</p>
BillingAddress	<p><b>Type</b> address</p> <p><b>Properties</b> Filter, Nillable</p> <p><b>Description</b> The compound form of the billing address. Read-only. For details on compound address fields, see Address Compound Fields.</p>
BillingCity	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Details for the billing address of this account. Maximum size is 40 characters.</p>
BillingCountry	<p><b>Type</b> string</p>

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

Field Name	Details
	<p><b>Description</b> Details for the billing address of this account. Maximum size is 20 characters.</p>
BillingState	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Details for the billing address of this account. Maximum size is 80 characters.</p>
BillingStateCode	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The ISO state code for the account's billing address.</p>
BillingStreet	<p><b>Type</b> textarea</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Street address for the billing address of this account.</p>
ChannelProgramLevelName	<p><b>Type</b> string</p> <p><b>Properties</b> Group, Nillable</p> <p><b>Description</b> Read only. Name of the channel program level the account has enrolled. If this account has enrolled more than one channel program level, the oldest channel program name is displayed.</p>
ChannelProgramName	<p><b>Type</b> string</p> <p><b>Properties</b> Group, Nillable</p> <p><b>Description</b> Read only. Name of the channel program the account has enrolled. If this account has enrolled more than one channel program, the oldest channel program name is displayed.</p>
CleanStatus	<p><b>Type</b> picklist</p>

Field Name	Details
	<p><b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> Indicates the record's clean status as compared with Data.com.. Possible values are:</p> <ul style="list-style-type: none"> <li>• Acknowledged—The label on the account record detail page is <b>Reviewed</b>.</li> <li>• Different</li> <li>• Inactive</li> <li>• Matched—The label on the account record detail page is <b>In Sync</b>.</li> <li>• NotFound</li> <li>• Pending—The label on the account record detail page is <b>Not Compared</b>.</li> <li>• SelectMatch</li> <li>• Skipped</li> </ul>
ConnectionReceivedId	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> ID of the PartnerNetworkConnection that shared this record with your organization. This field is available if you enabled Salesforce to Salesforce.</p>
ConnectionSentId	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> 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 <code>PartnerNetworkRecordConnection</code> object to forward records to connections.</p>
Description	<p><b>Type</b> textarea</p> <p><b>Properties</b> Create, Nillable, Update</p> <p><b>Description</b> Text description of the account. Limited to 32,000 KB.</p>
DunsNumber	<p><b>Type</b> string</p>

Field Name	Details
	<p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The Data Universal Numbering System (D-U-N-S) number is a unique, nine-digit number assigned to every business location in the Dun &amp; Bradstreet database that has a unique, separate, and distinct operation. D-U-N-S numbers are used by industries and organizations around the world as a global standard for business identification and tracking. Maximum size is 9 characters. This field is available on business accounts, not person accounts.</p> <p> <b>Note:</b> This field is only available to organizations that use Data.com Prospector or Data.com Clean.</p>
Fax	<p><b>Type</b> phone</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Fax number for the account.</p>
Industry	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> An industry associated with this account. For example, Biotechnology. Maximum size is 40 characters.</p>
IsBuyer	<p><b>Type</b> boolean</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Sort</p> <p><b>Description</b> Indicates that the account is enabled as a buyer for Lightning B2B Commerce. The default value is <code>false</code>. This field is available in API version 48.0 and later.</p> <p> <b>Note:</b> This field is only available to organizations that have the B2B Commerce license enabled.</p>
IsCustomerPortal	<p><b>Type</b> boolean</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Sort, Update</p>

Field Name	Details
	<p><b>Description</b></p> <p>Indicates whether the account has at least one contact enabled to use the org's Experience Cloud site or Customer Portal (<code>true</code>) or not (<code>false</code>). This field is available if Customer Portal is enabled OR digital experiences is enabled.</p> <p>If your org is enabled to use Content Security Policy (CSP) features, then this field is visible on the Account object even if those features are later disabled.</p> <p>If you change this field's value from <code>true</code> to <code>false</code>, you can disable up to 100 Experience Cloud site or Customer Portal users associated with the account and permanently delete all of the account's site roles and groups. You can't restore deleted site roles and groups.</p> <p>Exclude this field when merging accounts.</p> <p>This field can be updated in API version 16.0 and later.</p> <p> <b>Tip:</b> We recommend that you update up to 50 contacts simultaneously when changing the accounts on contacts enabled for an Experience Cloud site. We also recommend that you make this update after business hours.</p>
IsPartner	<p><b>Type</b></p> <p>boolean</p> <p><b>Properties</b></p> <p>Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b></p> <p>Indicates whether the account has at least one contact enabled to use the org's partner portal (<code>true</code>) or not (<code>false</code>). This field is available if partner relationship management (partner portal) is enabled OR digital experiences is enabled and you have partner portal licenses.</p> <p>If you change this field's value from <code>true</code> to <code>false</code>, you can disable up to 15 partner portal users associated with the account and permanently delete all of the account's partner portal roles and groups. You can't restore deleted partner portal roles and groups.</p> <p>Disabling a partner portal user in the Salesforce user interface or the API doesn't change this field's value from <code>true</code> to <code>false</code>.</p> <p>Even if this field's value is <code>false</code>, you can enable a contact on an account as a partner portal user via the API.</p> <p>Exclude this field when merging accounts.</p> <p>This field can be updated in API version 16.0 and later.</p> <p> <b>Tip:</b> We recommend that you update up to 50 contacts simultaneously when changing the accounts on contacts enabled for an Experience Cloud site. We also recommend that you make this update after business hours.</p>
IsPersonAccount	<p><b>Type</b></p> <p>boolean</p> <p><b>Properties</b></p> <p>Defaulted on create, Filter, Group, Sort</p>

Field Name	Details
	<p><b>Description</b> Read only. Label is <b>Is Person Account</b>. Indicates whether this account has a record type of Person Account (<code>true</code>) or not (<code>false</code>).</p>
IsPriorityRecord	<p><b>Type</b> boolean</p> <p><b>Properties</b> Defaulted on create, Group</p> <p><b>Description</b> Shows whether the user has marked the account as important (<code>True</code>) or not (<code>False</code>). The default value is <code>false</code>. Available in API version 60.0 and later.</p>
Jigsaw	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> References the ID of a company in Data.com. If an account has a value in this field, it means that the account was imported from Data.com. If the field value is <code>null</code>, the account was not imported from Data.com. Maximum size is 20 characters. Available in API version 22.0 and later. Label is <b>Data.com Key</b>. This field is available on business accounts, not person accounts.</p> <p> <b>Important:</b> The <code>Jigsaw</code> field is exposed in the API to support troubleshooting for import errors and reimporting of corrected data. Do not modify the value in the <code>Jigsaw</code> field.</p>
JigsawCompanyId	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The ID of the company in reference to <code>Jigsaw</code>.</p> <p> <b>Important:</b> The <code>Jigsaw</code> field is exposed in the API to support troubleshooting for import errors and reimporting of corrected data. Don't modify the value in the <code>Jigsaw</code> field.</p>
LastActivityDate	<p><b>Type</b> date</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> Value is one of the following, whichever is the most recent:</p>

Field Name	Details
	<ul style="list-style-type: none"> <li>Due date of the most recent event logged against the record.</li> <li>Due date of the most recently closed task associated with the record.</li> </ul>
LastReferencedDate	<p><b>Type</b> datetime</p> <p><b>Properties</b> Filter, Nillable, Sort</p>
	<p><b>Description</b> The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p><b>Type</b> datetime</p> <p><b>Properties</b> Filter, Nillable, Sort</p>
	<p><b>Description</b> The timestamp when the current user last viewed this record or list view. If this value is null, the user might have only accessed this record or list view (LastReferencedDate), but not viewed it.</p>
MasterRecordId	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p>
	<p><b>Description</b> If this object was deleted as the result of a merge, this field contains the ID of the record that was kept. If this object was deleted for any other reason, or has not been deleted, the value is null.</p> <p>This is a relationship field.</p>
	<p><b>Relationship Name</b> MasterRecord</p>
	<p><b>Relationship Type</b> Lookup</p>
	<p><b>Refers To</b> Account</p>
NaicsCode	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p>

Field Name	Details
	<p><b>Description</b></p> <p>The six-digit North American Industry Classification System (NAICS) code is the standard used by business and government to classify business establishments into industries, according to their economic activity for the purpose of collecting, analyzing, and publishing statistical data related to the U.S. business economy. Maximum size is 8 characters. This field is available on business accounts, not person accounts.</p> <p> <b>Note:</b> This field is only available to organizations that use Data.com Prospector or Data.com Clean.</p>
NaicsDesc	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b></p> <p>A brief description of an org's line of business, based on its NAICS code. Maximum size is 120 characters. This field is available on business accounts, not person accounts.</p> <p> <b>Note:</b> This field is only available to organizations that use Data.com Prospector or Data.com Clean.</p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b></p> <p>Required. Label is <b>Account Name</b>. Name of the account. Maximum size is 255 characters. If the account has a record type of Person Account:</p> <ul style="list-style-type: none"> <li>• This value is the concatenation of the <code>FirstName</code>, <code>MiddleName</code>, <code>LastName</code>, and <code>Suffix</code> of the associated person contact.</li> <li>• You can't modify this value.</li> </ul>
NumberOfEmployees	<p><b>Type</b> int</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b></p> <p>Label is <b>Employees</b>. Number of employees working at the company represented by this account. Maximum size is eight digits.</p>
OperatingHoursId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p>

Field Name	Details
	<p><b>Description</b>            The operating hours associated with the account. Available only if Field Service is enabled.            This is a relationship field.</p> <p><b>Relationship Name</b>            OperatingHours</p> <p><b>Relationship Type</b>            Lookup</p> <p><b>Refers To</b>            OperatingHours</p>
OwnerId	<p><b>Type</b>            reference</p> <p><b>Properties</b>            Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b>            The ID of the user who currently owns this account. Default value is the user logged in to the API to perform the create.            If you have set up account teams in your org, updating this field has different consequences depending on your version of the API:           <ul style="list-style-type: none"> <li>For API version 12.0 and later, sharing records are kept, as they are for all objects.</li> <li>For API version before 12.0, sharing records are deleted.</li> <li>For API version 16.0 and later, users must have the "Transfer Record" permission in order to update (transfer) account ownership using this field.</li> </ul>           This is a relationship field.</p> <p><b>Relationship Name</b>            Owner</p> <p><b>Relationship Type</b>            Lookup</p> <p><b>Refers To</b>            User</p>
Ownership	<p><b>Type</b>            picklist</p> <p><b>Properties</b>            Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b>            Ownership type for the account, for example Private, Public, or Subsidiary.</p>
ParentId	<p><b>Type</b>            reference</p>

Field Name	Details
	<p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> ID of the parent object, if any. This is a relationship field.</p> <p><b>Relationship Name</b> Parent</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> Account</p>
PersonActionCadenceAssigneeId	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The ID of the sales rep designated to work the lead through their assigned cadence. This field is available in API version 47.0 and later when the Sales Engagement license is enabled. To see this field, the user also needs the Sales Engagement User or Sales Engagement Quick Cadence Creator user permission set. This field is a polymorphic relationship field.</p> <p><b>Relationship Name</b> PersonActionCadenceAssignee</p> <p><b>Refers To</b> Group, User</p>
PersonActionCadenceId	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The ID of the lead's assigned cadence. This field is available in API version 46.0 and later when the Sales Engagement license is enabled. To see this field, the user also needs the Sales Engagement User or Sales Engagement Quick Cadence Creator user permission set. This is a relationship field.</p> <p><b>Relationship Name</b> PersonActionCadence</p> <p><b>Refers To</b> ActionCadence</p>

Field Name	Details
PersonActionCadenceState	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> The state of the current action cadence tracker. This field is available in API version 50.0 and later when the Sales Engagement license is enabled. To see this field, the user also needs the Sales Engagement User or Sales Engagement Quick Cadence Creator user permission set.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• Complete</li> <li>• Error</li> <li>• Initializing</li> <li>• Paused</li> <li>• Processing</li> <li>• Running</li> </ul>
PersonIndividualID	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> ID of the data privacy record associated with this person's account. This field is available if you enabled Data Protection and Privacy in Setup.</p> <p>Available in API version 42.0 and later.</p>
PersonScheduledResumeDateTime	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The date and time when the action cadence tracker is going to resume after it's paused or on a wait step. This field is available in API version 54.0 and later when the Sales Engagement license is enabled. To see this field, the user also needs the Sales Engagement User or Sales Engagement Quick Cadence Creator user permission set.</p>
Phone	<p><b>Type</b> phone</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p>

Field Name	Details
	<p><b>Description</b> Phone number for this account. Maximum size is 40 characters.</p>
PhotoUrl	<p><b>Type</b> url</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> Path to be combined with the URL of a Salesforce instance (for example, <a href="https://yourInstance.salesforce.com/">https://yourInstance.salesforce.com/</a>) to generate a URL to request the social network profile image associated with the account. Generated URL returns an HTTP redirect (code 302) to the social network profile image for the account.</p> <p>Blank if Social Accounts and Contacts isn't enabled for the org or if Social Accounts and Contacts is disabled for the requesting user.</p>
Rating	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The account's prospect rating, for example Hot, Warm, or Cold.</p>
RecordTypeId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> ID of the record type assigned to this object.</p>
Salutation	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Honorable added to the name for use in letters, etc. This field is available on person accounts.</p>
ShippingAddress	<p><b>Type</b> address</p> <p><b>Properties</b> Filter, Nillable</p>

Field Name	Details
	<p><b>Description</b> The compound form of the shipping address. Read-only. See Address Compound Fields for details on compound address fields.</p>
ShippingCity	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Details of the shipping address for this account. City maximum size is 40 characters</p>
ShippingCountry	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Details of the shipping address for this account. Country maximum size is 80 characters.</p>
ShippingCountryCode	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The ISO country code for the account's shipping address.</p>
ShippingGeocodeAccuracy	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> Accuracy level of the geocode for the shipping address. For details on geolocation compound fields, see Compound Field Considerations and Limitations.</p>
ShippingLatitude	<p><b>Type</b> double</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> Used with <code>ShippingLongitude</code> to specify the precise geolocation of a shipping address. Acceptable values are numbers between –90 and 90 with up to 15 decimal places. For details on geolocation compound fields, see Compound Field Considerations and Limitations.</p>

Field Name	Details
ShippingLongitude	<p><b>Type</b> double</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> Used with <code>ShippingLatitude</code> to specify the precise geolocation of an address. Acceptable values are numbers between –180 and 180 with up to 15 decimal places. For details on geolocation compound fields, see Compound Field Considerations and Limitations.</p>
ShippingPostalCode	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Details of the shipping address for this account. Postal code maximum size is 20 characters.</p>
ShippingState	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Details of the shipping address for this account. State maximum size is 80 characters.</p>
ShippingStateCode	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The ISO state code for the account's shipping address.</p>
ShippingStreet	<p><b>Type</b> textarea</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The street address of the shipping address for this account. Maximum of 255 characters.</p>
Sic	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p>

Field Name	Details
	<b>Description</b>
	<p>Standard Industrial Classification code of the company's main business categorization, for example, 57340 for Electronics. Maximum of 20 characters. This field is available on business accounts, not person accounts.</p>
SicDesc	<b>Type</b>
	string
	<b>Properties</b>
	Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b>
	<p>A brief description of an org's line of business, based on its SIC code. Maximum length is 80 characters. This field is available on business accounts, not person accounts.</p>
Site	<b>Type</b>
	string
	<b>Properties</b>
	Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b>
	<p>Name of the account's location, for example <b>Headquarters</b> or <b>London</b>. Label is <b>Account Site</b>. Maximum of 80 characters.</p>
TickerSymbol	<b>Type</b>
	string
	<b>Properties</b>
	Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b>
	<p>The stock market symbol for this account. Maximum of 20 characters. This field is available on business accounts, not person accounts.</p>
Tradestyle	<b>Type</b>
	string
	<b>Properties</b>
	Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b>
	<p>A name, different from its legal name, that an org may use for conducting business. Similar to "Doing business as" or "DBA". Maximum length is 255 characters. This field is available on business accounts, not person accounts.</p>
	<b>Note:</b> This field is only available to organizations that use Data.com Prospector or Data.com Clean.
Type	<b>Type</b>
	picklist

Field Name	Details
	<p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Type of account, for example, Customer, Competitor, or Partner.</p>
Website	<p><b>Type</b> url</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The website of this account. Maximum of 255 characters.</p>
YearStarted	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The date when an org was legally established. Maximum length is 4 characters. This field is available on business accounts, not person accounts.</p> <p> <b>Note:</b> This field is only available to organizations that use Data.com Prospector or Data.com Clean.</p>

## IsPersonAccount Fields

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

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

Field Name	Details
FirstName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> First name of the person for a person account. Maximum size is 40 characters.</p>
LastName	<p><b>Type</b> string</p>

Field Name	Details
	<p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Last name of the person for a person account. Required if the record type is a person account record type. Maximum size is 80 characters.</p>
MiddleName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Middle name of the person for a person account. Maximum size is 40 characters.</p>
PersonAssistantName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Nillable, Update</p> <p><b>Description</b> The person account's assistant name. Label is <b>Assistant</b>. Maximum size is 40 characters.</p>
PersonAssistantPhone	<p><b>Type</b> phone</p> <p><b>Properties</b> Create, Filter, Nillable, Update</p> <p><b>Description</b> The person account's assistant phone. Label is <b>Asst. Phone</b>. Maximum size is 40 characters.</p>
PersonBirthDate	<p><b>Type</b> date</p> <p><b>Properties</b> Create, Filter, Nillable, Update</p> <p><b>Description</b> The birthday of the contact associated with this person account. Label is <b>Birthdate</b>. The year portion of the <code>PersonBirthDate</code> field is ignored in filter criteria, including report filters, list view filters, and SOQL queries. For example, the following SOQL query returns person accounts with birthdays later in the year than today:</p> <pre>SELECT FirstName, LastName, PersonBirthDate FROM Account WHERE Birthdate &gt; TODAY</pre>
PersonContactId	<p><b>Type</b> reference</p>

Field Name	Details
	<p><b>Properties</b> Filter, Nillable, Update</p> <p><b>Description</b> The ID for the contact associated with this person account. Label is <b>Contact ID</b>.</p>
PersonDepartment	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Nillable, Update</p> <p><b>Description</b> The department. Label is <b>Department</b>. Maximum size is 80 characters.</p>
PersonEmail	<p><b>Type</b> email</p> <p><b>Properties</b> Create, Filter, Nillable, Update</p> <p><b>Description</b> Email address for this person account. Label is <b>Email</b>.</p>
PersonEmailBouncedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Create, Filter, Nillable, Update</p> <p><b>Description</b> If bounce management is activated and an email sent to the person account bounces, the date and time the bounce occurred.</p>
PersonEmailBouncedReason	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Nillable, Update</p> <p><b>Description</b> If bounce management is activated and an email sent to the person account bounces, the reason the bounce occurred</p>
PersonGenderIdentity	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The person's internal experience of their gender, which may or may not correspond to the person's designated sex at birth. Label is <b>Gender Identity</b>.</p>

Field Name	Details
PersonHasOptedOutOfEmail	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Filter, Nullable, Update</p> <p><b>Description</b> Indicates whether the person account has opted out of email (true) or not (false). Label is <b>Email Opt Out</b>.</p>
PersonHomePhone	<p><b>Type</b> phone</p> <p><b>Properties</b> Create, Filter, Nullable, Update</p> <p><b>Description</b> The home phone number for this person account. Label is <b>Home Phone</b>.</p>
PersonLeadSource	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Nullable, Update</p> <p><b>Description</b> The person account's lead source. Label is <b>Lead Source</b>.</p>
PersonMailingAddress	<p><b>Type</b> address</p> <p><b>Properties</b> Filter, Nullable</p> <p><b>Description</b> The compound form of the person account mailing address. Read-only. For details on compound address fields, see Address Compound Fields.</p>
<ul style="list-style-type: none"> <li>PersonMailingCity</li> <li>PersonMailingCountry</li> <li>PersonMailingPostalCode</li> <li>PersonMailingState</li> </ul>	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Nullable, Update</p> <p><b>Description</b> Details about the mailing address for this person account. Labels are <b>Mailing City</b>, <b>Mailing Country</b>, <b>Postal Code</b>, and <b>State</b>. Maximum size for city and country is 40 characters. Maximum size for postal code and state is 20 characters.</p>
<ul style="list-style-type: none"> <li>PersonMailingCountryCode</li> <li>PersonMailingStateCode</li> </ul>	<p><b>Type</b> picklist</p>

Field Name	Details
	<p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The ISO country or state code for the mailing address of the person account.</p>
PersonMailingGeocodeAccuracy	<p><b>Type</b> picklist</p> <p><b>Properties</b> Retrieve, Query, Restricted picklist, Nillable</p> <p><b>Description</b> Accuracy level of the geocode for the person's mailing address. For details on geolocation compound fields, see Compound Field Considerations and Limitations.</p>
PersonMailingLatitude	<p><b>Type</b> double</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> Used with <code>PersonMailingLongitude</code> to specify the precise geolocation of a person account's mailing address. Acceptable values are numbers between –90 and 90 with up to 15 decimal places. For details on geolocation compound fields, see Compound Field Considerations and Limitations.</p>
PersonMailingLongitude	<p><b>Type</b> double</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> Used with <code>PersonMailingLatitude</code> to specify the precise geolocation of a person account's mailing address. Acceptable values are numbers between –180 and 180 with up to 15 decimal places. For details on geolocation compound fields, see Compound Field Considerations and Limitations.</p>
PersonMailingStreet	<p><b>Type</b> textarea</p> <p><b>Properties</b> Create, Filter, Nillable, Update</p> <p><b>Description</b> The mailing street address for this person account. Label is <b>Mailing Street</b>. Maximum size is 255 characters.</p>

Field Name	Details
PersonMobilePhone	<p><b>Type</b> phone</p> <p><b>Properties</b> Create, Filter, Nillable, Update</p> <p><b>Description</b> The mobile phone number for this person account. Label is <b>Mobile</b>.</p>
• PersonOtherCity • PersonOtherCountry • PersonOtherPostalCode • PersonOtherState	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Nillable, Update</p> <p><b>Description</b> Details about the alternate address for this person account. Labels are <b>Other City</b>, <b>Other Country</b>, <b>Other Zip/Postal Code</b>, and <b>Other State</b>.</p>
• PersonOtherCountryCode • PersonOtherStateCode	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The ISO country or state code for the alternate address of the person account.</p>
PersonOtherLatitude	<p><b>Type</b> double</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> Used with <code>PersonOtherLongitude</code> to specify the precise geolocation of a person account's alternate address. Acceptable values are numbers between –90 and 90 with up to 15 decimal places. For details on geolocation compound fields, see Compound Field Considerations and Limitations.</p>
PersonOtherLongitude	<p><b>Type</b> double</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> Used with <code>PersonOtherLatitude</code> to specify the precise geolocation of a person account's alternate address. Acceptable values are numbers between –180 and 180 with up to 15 decimal places. For details on geolocation compound fields, see Compound Field Considerations and Limitations.</p>

Field Name	Details
PersonOtherPhone	<p><b>Type</b> phone</p> <p><b>Properties</b> Create, Filter, Nillable, Update</p> <p><b>Description</b> The alternate phone number for this person account. Label is <b>Other Phone</b>.</p>
PersonOtherStreet	<p><b>Type</b> textarea</p> <p><b>Properties</b> Create, Filter, Nillable, Update</p> <p><b>Description</b> The person account's alternate street address. Label is <b>Other Street</b>.</p>
PersonPronouns	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The individual's personal pronouns, reflecting their gender identity. Others can use these pronouns to refer to the individual in the third person. The entry is selected from a picklist of available values, which the administrator sets. Maximum 40 characters. Label is <b>Pronouns</b>. Possible values are:</p> <ul style="list-style-type: none"> <li>• He/Him</li> <li>• He/They</li> <li>• Not Listed</li> <li>• She/Her</li> <li>• She/They</li> <li>• They/Them</li> </ul>
PersonReportsToId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort Update</p> <p><b>Description</b> ID of the person account or contact that this person account reports to. This field doesn't appear if <code>enableReportsToOnPersonAccount</code> in the <code>AccountSettings</code> metadata type is <code>false</code>. Available in API version 62.0 and later. This is a relationship field.</p>

Field Name	Details
	<p><b>Relationship Name</b> PersonReportsTo</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> Contact</p>
PersonTitle	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Nullable, Update</p> <p><b>Description</b> The person account's title. Label is <b>Title</b>. Maximum size is 80 characters. When converting a lead to a person account, the conversion fails if the lead's Title field contains more than 80 characters.</p>
Suffix	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nullable, Sort, Update</p> <p><b>Description</b> Name suffix of the person for a person account. Maximum size is 40 characters.</p>



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

## Usage

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

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

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

## Associated Objects

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

### AccountChangeEvent (API version 44.0)

Change events are available for the object.

### AccountFeed (API version 18.0)

Feed tracking is available for the object.

**AccountHistory (API version 11.0)**

History is available for tracked fields of the object.

**AccountOwnerSharingRule**

Sharing rules are available for the object.

**AccountShare**

Sharing is available for the object.

## DealIndirectPartner

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

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

## Supported Calls

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

## Fields

Field	Details
AccountId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The account associated with the indirect partner on the deal. This field is a relationship field.</p> <p><b>Relationship Name</b> Account</p> <p><b>Refers To</b> Account</p>
LastReferencedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp when the record was last referenced by the user or system.</p>
LastViewedDate	<p><b>Type</b> dateTime</p>

Field	Details
	<p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> Date and the timestamp when the record was last viewed in the Salesforce UI. Helps monitor user access and engagement.</p>
LeadId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Reference to a lead associated with this indirect partner record. This field is a relationship field.</p> <p><b>Relationship Name</b> Lead</p> <p><b>Refers To</b> Lead</p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p><b>Description</b> System-generated unique identifier for the record, used for lookup and reference purposes.</p>
OpportunityId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Opportunity associated with the indirect partner. This field is a relationship field.</p> <p><b>Relationship Name</b> Opportunity</p> <p><b>Refers To</b> Opportunity</p>
OwnerId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p>

Field	Details
	<p><b>Description</b> User or group that owns this record. This field is a polymorphic relationship field.</p> <p><b>Relationship Name</b> Owner</p> <p><b>Refers To</b> Group, User</p>
PartnerName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> Name of the indirect partner participating in the deal. This field captures the business or entity name.</p>
PartnerRoleType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The role played by the indirect partner in the deal. Common values might include Reseller, Distributor, and so on.</p>
PrimaryContactFirstName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> First name of the primary contact at the partner organization.</p>
PrimaryContactLastName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Last name of the primary contact at the partner organization.</p>
PrimaryContactName	<p><b>Type</b> string</p>

Field	Details
	<p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> Full name of the primary contact. This field may be auto-generated by combining first and last names or used for reporting purposes.</p>
PrimaryContactSalutation	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Salutation for the primary contact. Possible values are:</p> <ul style="list-style-type: none"> <li>• Dr.</li> <li>• Mr.</li> <li>• Mrs.</li> <li>• Ms.</li> <li>• Mx.</li> <li>• Prof.</li> </ul>

## Lead

Represents a prospect or lead.

### Supported Calls

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

## Fields

Field	Details
ActionCadenceAssigneeId	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The ID of the sales rep designated to work the lead through their assigned cadence. This field is available in API version 48.0 and later when the Sales Engagement license is enabled.</p>

Field	Details
	<p>To see this field, the user also needs the Sales Engagement User or Sales Engagement Quick Cadence Creator user permission set.</p>
ActionCadenceId	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The ID of the lead's assigned cadence. This field is available in API version 48.0 and later when the Sales Engagement license is enabled. To see this field, the user also needs the Sales Engagement User or Sales Engagement Quick Cadence Creator user permission set.</p>
ActionCadenceState	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> The state of the current action cadence tracker. This field is available in API version 50.0 and later when the Sales Engagement license is enabled. To see this field, the user also needs the Sales Engagement User or Sales Engagement Quick Cadence Creator user permission set.</p> <p>Possible values are:</p> <ul style="list-style-type: none"><li>• Complete</li><li>• Error</li><li>• Initializing</li><li>• Paused</li><li>• Processing</li><li>• Running</li></ul>
ActiveTrackerCount	<p><b>Type</b> int</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The number of cadences that are actively running on this lead. This field is available in API version 57.0 and later when the Sales Engagement license is enabled. To see this field, the user also needs the Sales Engagement User or Sales Engagement Quick Cadence Creator user permission set.</p>
ActivityMetricId	<p><b>Type</b> reference</p>

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

Field	Details
City	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> City for the lead's address.</p>
CleanStatus	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> Indicates the record's clean status compared with Data.com. . Several values for <code>CleanStatus</code> appear with different labels on the lead record. Values include:</p> <ul style="list-style-type: none"> <li>• Acknowledged - Reviewed</li> <li>• Different</li> <li>• Inactive</li> <li>• Matched - In Sync</li> <li>• NotFound - Not Found</li> <li>• Pending - Not Compared</li> <li>• SelectMatch - Select Match Skipped</li> </ul>
Company	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Required. The lead's company. If person account record types have been enabled, and if the value of <code>Company</code> is null, the lead converts to a person account.</p>
CompanyDunsNumber	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The Data Universal Numbering System (D-U-N-S) number, which is a unique, nine-digit number assigned to every business location in the Dun &amp; Bradstreet database that has a</p>

Field	Details
	<p>unique, separate, and distinct operation. Industries and companies use D-U-N-S numbers as a global standard for business identification and tracking. Maximum size is 9 characters.</p> <p>This field is only available to organizations that use Data.com Prospector or Data.com Clean.</p>
ConvertedAccountId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort</p> <p><b>Description</b> Object reference ID that points to the account into which the lead converted.</p> <p>This is a relationship field.</p> <p><b>Relationship Name</b> ConvertedAccount</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> Account</p>
ConvertedContactId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort</p> <p><b>Description</b> Object reference ID that points to the contact into which the lead converted.</p> <p>This is a relationship field.</p> <p><b>Relationship Name</b> ConvertedContact</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> Contact</p>
ConvertedDate	<p><b>Type</b> date</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort</p> <p><b>Description</b> Date on which this lead was converted.</p>
ConvertedOpportunityId	<p><b>Type</b> reference</p>

Field	Details
	<p><b>Properties</b> Create, Filter, Group, Nillable, Sort</p> <p><b>Description</b> Object reference ID that points to the opportunity into which the lead has been converted. This is a relationship field.</p> <p><b>Relationship Name</b> ConvertedOpportunity</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> Opportunity</p>
ConnectionReceivedId	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> ID of the PartnerNetworkConnection that shared this record with your org. This field is available when Salesforce to Salesforce is enabled.</p>
ConnectionSentId	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> ID of the PartnerNetworkConnection that this record is shared with. This field is available when Salesforce to Salesforce is enabled. In API version 16.0 and later, this value is null. Use PartnerNetworkRecordConnection object to forward records to connections.</p>
Country	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The lead's country.</p>
CountryCode	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p>

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

Field	Details
	<p><b>Properties</b> Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p><b>Description</b> The lead's email address.</p>
EmailBouncedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort, Update</p> <p><b>Description</b> If bounce management is activated and an email sent to the lead bounced, the date and time of the bounce. Email bounce functionality isn't triggered by record updates, including updates to this field.</p>
EmailBouncedReason	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> If bounce management is activated and an email sent to the lead bounced, the reason for the bounce. Email bounce functionality isn't triggered by record updates, including updates to this field.</p>
ExportStatus	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Restricted picklist, Sort</p> <p><b>Description</b> Derived field for the record map for Partner Connect. The export status of this opportunity to the partner's connected org. To see this field, enable Partner Connect and add the Export Vendor Records to an Authorized Partner Org user permission to the cosell export user. See <a href="#">Set Up Partner Connect as a Vendor</a> in <i>Salesforce Help</i>. Available in API version 62.0 and later.</p>
Fax	<p><b>Type</b> phone</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The lead's fax number.</p>
FirstCallDateTime	<p><b>Type</b> datetime</p>

Field	Details
	<p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The date and time of the first call placed to the lead. This field is available in API version 48.0 when the Sales Engagement license is enabled. To see this field, the user also needs the Sales Engagement User or Sales Engagement Quick Cadence Creator user permission set.</p>
FirstEmailDateTime	<p><b>Type</b> datetime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The date and time of the first email sent to the lead. This field is available in API version 48.0 when the Sales Engagement license is enabled. To see this field, the user also needs the Sales Engagement User or Sales Engagement Quick Cadence Creator user permission set.</p>
FirstName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The lead's first name up to 40 characters.</p>
GeocodeAccuracy	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> Accuracy level of the geocode for the address. For details on geolocation compound fields, see Compound Field Considerations and Limitations.</p>
GenderIdentity	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The lead's internal experience of their gender, which may or may not correspond to their designated sex at birth.</p>
HasOptedOutOfEmail	<p><b>Type</b> boolean</p>

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

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

Field	Details
	<p><b>Description</b> The ID of the contact in reference to Jigsaw.</p> <p> <b>Important:</b> The Jigsaw field is exposed in the API to support troubleshooting for import errors and reimporting of corrected data. Don't modify the value in the Jigsaw field.</p>
LastActivityDate	<p><b>Type</b> date</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> Value is the most recent of either:</p> <ul style="list-style-type: none"><li>• Due date of the most recent event logged against the record.</li><li>• Due date of the most recently closed task associated with the record.</li></ul>
LastName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> Required. Last name of the lead up to 80 characters.</p>
LastReferencedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p><b>Type</b> datetime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp when the current user last viewed this record or list view. If this value is null, the user might have only accessed this record or list view (LastReferencedDate) but not viewed it.</p>
Latitude	<p><b>Type</b> double</p>

Field	Details
	<p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> Used with <code>Longitude</code> to specify the precise geolocation of an address. Acceptable values are numbers between –90 and 90 up to 15 decimal places. For details on geolocation compound fields, see Compound Field Considerations and Limitations</p>
LeadSource	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The origin or source of the lead.</p>
Longitude	<p><b>Type</b> double</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> Used with <code>Latitude</code> to specify the precise geolocation of an address. Acceptable values are numbers between –180 and 180 up to 15 decimal places. For details on geolocation compound fields, see Compound Field Considerations and Limitations.</p>
MasterRecordId	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> If this record was deleted as the result of a merge, this field contains the ID of the record that was kept. If this record was deleted for any other reason, or hasn't been deleted, the value is <code>null</code>.  When using Apex triggers to determine which record was deleted in a merge event, this field's value is the ID of the record that remains in <code>Trigger.old</code>. In <code>Trigger.new</code>, the value is <code>null</code>.  This is a relationship field.</p> <p><b>Relationship Name</b> MasterRecord</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> Lead</p>

Field	Details
MiddleName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The lead's middle name. Maximum size is 40 characters.</p>
MobilePhone	<p><b>Type</b> phone</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The lead's mobile phone number.</p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> Concatenation of FirstName, MiddleName, LastName, and Suffix up to 203 characters, including whitespaces.</p>
NumberOfEmployees	<p><b>Type</b> int</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Number of employees at the lead's company. Label is <b>Employees</b>.</p>
OwnerId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> ID of the lead's owner. This is a polymorphic relationship field.</p> <p><b>Relationship Name</b> Owner</p> <p><b>Relationship Type</b> Lookup</p>

Field	Details
	<p><b>Refers To</b> Group, User</p>
PartnerAccountId	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> ID of the partner account for the partner user that owns this lead. Available if Partner Relationship Management is enabled or if digital experiences is enabled and you have partner portal licenses. In API version 16.0 and later, the <code>Partner Account</code> field is set to the appropriate account for the partner user that owns the lead. If the owner of the lead isn't a partner user, this field has no value.</p>
Phone	<p><b>Type</b> phone</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The lead's phone number.</p>
PhotoUrl	<p><b>Type</b> url</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> Path to be combined with the URL of a Salesforce instance (<i>Example:</i> <a href="https://yourInstance.salesforce.com/">https://yourInstance.salesforce.com/</a>) to generate a URL to request the social network profile image associated with the lead. Generated URL returns an HTTP redirect (code 302) to the social network profile image for the lead.</p>
PostalCode	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Postal code for the address of the lead. Label is <b>Zip/Postal Code</b>.</p>
Pronouns	<p><b>Type</b> picklist</p>

Field	Details
	<p><b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The lead's personal pronouns, reflecting their gender identity. Others can use these pronouns to refer to the lead in the third person. The entry is selected from a picklist of available values, which the administrator sets. Maximum 40 characters.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• He/Him</li> <li>• He/They</li> <li>• Not Listed</li> <li>• She/Her</li> <li>• She/They</li> <li>• They/Them</li> </ul>
Rating	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Rating of the lead.</p>
RecordTypeId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Nillable, Update</p> <p><b>Description</b> ID of the record type assigned to this object.</p>
Salutation	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Salutation for the lead.</p>
ScheduledResumeDateTime	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p>

Field	Details
	<p><b>Description</b>            The date and time when the action cadence tracker is going to resume after it's paused or on a wait step. This field is available in API version 54.0 and later when the Sales Engagement license is enabled. To see this field, the user also needs the Sales Engagement User or Sales Engagement Quick Cadence Creator user permission set.</p>
ScoreIntelligenceId	<p><b>Type</b>            reference</p> <p><b>Properties</b>            Filter, Group, Nillable, Sort</p> <p><b>Description</b>            The ID of the intelligent field record that contains lead score.</p>
State	<p><b>Type</b>            string</p> <p><b>Properties</b>            Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b>            State for the address of the lead.</p>
StateCode	<p><b>Type</b>            picklist</p> <p><b>Properties</b>            Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b>            The ISO state code for the lead's address.</p>
Status	<p><b>Type</b>            picklist</p> <p><b>Properties</b>            Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b>            Status code for this converted lead. Status codes are defined in <code>status</code> and represented in the API by the <code>LeadStatus</code> object.</p>
Street	<p><b>Type</b>            textarea</p> <p><b>Properties</b>            Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b>            Street number and name for the address of the lead.</p>

Field	Details
Suffix	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The lead's name suffix. Maximum size is 40 characters.</p>
Title	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Title for the lead, such as CFO or CEO. The maximum size is 128 characters. When converting a lead to a person account, the conversion fails if the lead Title field contains more than 80 characters.</p>
Website	<p><b>Type</b> url</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Website for the lead.</p>



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

## Converted Leads

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

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

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

## Unread Leads

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

## Lead Status Picklist

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

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

## Usage

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

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

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

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

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

## Java Sample

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

```
package wsc;

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

```
import com.sforce.soap.enterprise.SaveResult;
import com.sforce.soap.enterprise.sobject.SObject;

public class LeadAssignment {

    static final String USERNAME = "REPLACE USER NAME";
    static final String PASSWORD = "REPLACE PASSWORD";
    static EnterpriseConnection connection;

    static LeadAssignment _leadAssignment;

    // Main
    public static void main(String[] args)
    {
        // Establish connection and login
        ConnectorConfig config = new ConnectorConfig();
        config.setUsername(USERNAME);
        config.setPassword(PASSWORD);
        try {
            connection = Connector.newConnection(config);
            System.out.println("Logged in, endpoint: " + config.getAuthEndpoint());
        } catch (ConnectionException e1) {
            e1.printStackTrace();
        }

        // Create lead
        _leadAssignment = new LeadAssignment();
        try {
            _leadAssignment.CreateLead();
        } catch (Exception e) {
            e.printStackTrace();
        }

        // Logout
        try {
            connection.logout();
            System.out.println("Logged out");
        } catch (ConnectionException ce) {
            ce.printStackTrace();
        }
    }

    public void CreateLead() throws ConnectionException
    {
        // Create a new Lead and assign various properties
        Lead lead = new Lead();

        lead.setFirstName("Joe");
        lead.setLastName("Smith");
        lead.setCompany("ABC Corporation");
        lead.setLeadSource("API");
        // The lead assignment rule will assign any new leads that
        // have "API" as the LeadSource to a particular user
    }
}
```

```

// In this sample we will look for a particular rule and if found
// use the id for the lead assignment. If it is not found we will
// instruct the call to use the current default rule. You can't use
// both of these values together.
QueryResult qr = connection.query("SELECT Id FROM AssignmentRule WHERE Name = " +
                                    "'Mass Mail Campaign' AND SObjectType = 'Lead'");
if (qr.getSize() == 0) {
    connection.setAssignmentRuleHeader(null, true);
} else {
    connection.setAssignmentRuleHeader(qr.getRecords()[0].getId(), false);
}

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

// This call effectively removes the header, the next lead will
// be assigned to the default lead owner.
connection.clearAssignmentRuleHeader();
}
}

```

## C# Sample

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

```

using System;
using System.Collections.Generic;
using System.Linq;
using System.Text;
using System.Threading.Tasks;
using System.ServiceModel;
using LeadSample.sforce;

namespace LeadSample
{
    class LeadAssignment
    {
        private static SoapClient client;
        private static SoapClient apiClient;
        private static SessionHeader header;
        private static LoginResult loginResult;
        private static readonly string Username = "REPLACE USERNAME";

```

```
private static readonly string Password = "REPLACE PASSWORD AND SECURITY TOKEN";

// Create the proxy binding and login
private LeadAssignment()
{
    client = new SoapClient();

    try
    {
        loginResult = client.login(null, Username, Password);
    }
    catch (Exception e)
    {
        Console.WriteLine("Unexpected login error: " + e.Message);
        Console.WriteLine(e.StackTrace);
        return;
    }
    // Access API endpoint and create new client
    header = new SessionHeader();
    header.sessionId = loginResult.sessionId;
    apiClient = new SoapClient("Soap", loginResult.serverUrl);
}

[STAThread]
static void Main(string[] args)
{
    LeadAssignment leadAssignment = new LeadAssignment();
    try
    {
        leadAssignment.CreateLead();
    }
    catch (Exception e)
    {
        Console.WriteLine(e.Message);
        Console.WriteLine(e.StackTrace);
        Console.WriteLine(e.InnerException);
    }
    // logout
    client.logout(header);
}

public void CreateLead()
{
    // Create a new Lead and assign various properties
    Lead lead = new Lead();

    lead.FirstName = "John";
    lead.LastName = "Brown";
    lead.Company = "ABC Corporation";
    lead.LeadSource = "Advertisement";
    // Setting the lead source for a pre-existing lead assignment rule. This
    // rule was created outside of this sample and will assign any new leads
    // that have "Advertisement" as the LeadSource to a particular user.
}
```

```
// Create the assignment rule header and add it to the proxy binding
AssignmentRuleHeader arh = new AssignmentRuleHeader();

// In this sample we will look for a particular rule and if found
// use the id for the lead assignment. If it is not found we will
// instruct the call to use the current default rule. Both these
// values can't be used together.
QueryResult qr = null;
string query = "SELECT Id FROM AssignmentRule WHERE Name = " +
    "'Mass Mail Campaign' AND SObjectType = 'Lead'";
try
{
    LimitInfo[] limitArray = apiClient.query(
        header, // sessionheader
        null, // queryoptions
        null, // mruheader
        null, // packageversionheader
        query, // SOQL query
        out qr);
}
catch (Exception e)
{
    Console.WriteLine("Unexpected query error: " + e.Message);
    Console.WriteLine(e.StackTrace);
}
if (qr.size == 0)
{
    arh.useDefaultRule = true;
}
else
{
    arh.assignmentRuleId = qr.records[0].Id;
}

// Create the lead using our Assignment Rule header
LimitInfo[] li;
SaveResult[] sr;
apiClient.create(
    header, // sessionheader
    arh, // assignmentruleheader
    null, // mruheader
    null, // allowfieldtruncationheader
    null, // disablefeedtrackingheader
    null, // streamingenabledheader
    null, // allornoneheader
    null, // duplicateruleheader
    null, // localeoptions
    null, // debuggingheader
    null, // packageversionheader
    null, // emailheader
    new sObject[] { lead },
    out li,
    out sr);
foreach (SaveResult s in sr)
```

```

    {
        if (s.success)
        {
            Console.WriteLine("Successfully created Lead with ID: {0}", s.id);
        }
        else
        {
            Console.WriteLine("Error creating Lead: {0}", s.errors[0].message);
        }
    }
}
}

```

## Associated Objects

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

### [LeadChangeEvent \(API version 44.0\)](#)

Change events are available for the object.

### [LeadFeed \(API version 18.0\)](#)

Feed tracking is available for the object.

### [LeadHistory](#)

History is available for tracked fields of the object.

### [LeadOwnerSharingRule](#)

Sharing rules are available for the object.

### [LeadShare](#)

Sharing is available for the object.

## Opportunity

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

## Supported Calls

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

## Fields

Field	Field Type
AccountId	<b>Type</b> reference <b>Properties</b> Create, Filter, Group, Nullable, Sort, Update

Field	Field Type
	<p><b>Description</b> ID of the account associated with this opportunity. This is a relationship field.</p> <p><b>Relationship Name</b> Account</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> Account</p>
ActivityMetricId	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> When Einstein Activity Capture with Activity Metrics is enabled, the ID of the related activity metric. This field is a relationship field.</p> <p><b>Relationship Name</b> ActivityMetric</p> <p><b>Refers To</b> ActivityMetric</p>
ActivityMetricRollupId	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> When Einstein Activity Capture with Activity Metrics is enabled, the ID of the related activity metric rollup. This field is a relationship field.</p> <p><b>Relationship Name</b> ActivityMetricRollup</p> <p><b>Refers To</b> ActivityMetricRollup</p>
AgeInDays	<p><b>Type</b> int</p> <p><b>Properties</b> Aggregate, Filter, Group, Nillable, Sort</p>

Field	Field Type
	<p><b>Description</b>            The number of days since the opportunity was created, calculated by the current date minus the <code>created_date</code> field. This field is available in API version 52.0 and later if you enabled Pipeline Inspection.</p>
Amount	<p><b>Type</b>            currency</p> <p><b>Properties</b>            Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b>            Estimated total sale amount. For opportunities with products, the amount is the sum of the related products. Any attempt to update this field, if the record has products, will be ignored. The update call will not be rejected, and other fields will be updated as specified, but the Amount will be unchanged.</p>
CampaignId	<p><b>Type</b>            reference</p> <p><b>Properties</b>            Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b>            ID of a related Campaign. This field is defined only for those organizations that have the campaign feature Campaigns enabled. The User must have read access rights to the cross-referenced Campaign object in order to create or update that campaign into this field on the opportunity.</p> <p>This is a relationship field.</p> <p><b>Relationship Name</b>            Campaign</p> <p><b>Relationship Type</b>            Lookup</p> <p><b>Refers To</b>            Campaign</p>
CloseDate	<p><b>Type</b>            date</p> <p><b>Properties</b>            Create, Filter, Group, Sort, Update</p> <p><b>Description</b>            Required. Date when the opportunity is expected to close.</p>
ConnectionReceivedId	<p><b>Type</b>            reference</p>

Field	Field Type
	<p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> ID of the PartnerNetworkConnection that shared this record with your organization. This field is available if you enabled Salesforce to Salesforce.</p>
ConnectionSentId	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> 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>
ContactId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort</p> <p><b>Description</b> ID of the contact associated with this opportunity, set as the primary contact. Read-only field that is derived from the opportunity contact role, which is created at the same time the opportunity is created. This field can only be populated when it's created, and can't be updated. To update the value in this field, change the <code>IsPrimary</code> flag on the OpportunityContactRole associated with this opportunity. Available in API version 46.0 and later.</p>
ContractId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> ID of the contract that's associated with this opportunity. This is a relationship field.</p> <p><b>Relationship Name</b> Contract</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> Contract</p>

Field	Field Type
CurrencyIsoCode	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> Available only for organizations with the multicurrency feature enabled. Contains the ISO code for any currency allowed by the organization.</p> <p>If the organization has multicurrency and a Pricebook2 is specified on the opportunity (that is, the <code>Pricebook2Id</code> field is not blank), then the currency value of this field must match the currency of the PricebookEntry records that are associated with any opportunity line items it has.</p>
Description	<p><b>Type</b> textarea</p> <p><b>Properties</b> Create, Nillable, Update</p> <p><b>Description</b> Text description of the opportunity. Limit: 32,000 characters.</p>
ExpectedRevenue	<p><b>Type</b> currency</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> Read-only field that is equal to the product of the opportunity <code>Amount</code> field and the <code>Probability</code>. You can't directly set this field, but you can indirectly set it by setting the <code>Amount</code> or <code>Probability</code> fields.</p>
ExportStatus	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Restricted picklist, Sort</p> <p><b>Description</b> Derived field for the record map for Partner Connect. The export status of this opportunity to the partner's connected org. To see this field, enable Partner Connect and add the Export Vendor Records to an Authorized Partner Org user permission to the cosell export user. See <a href="#">Set Up Partner Connect as a Vendor</a> in <i>Salesforce Help</i>. Available in API version 62.0 and later.</p>
Fiscal	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p>

Field	Field Type
	<p><b>Description</b> If fiscal years are not enabled, the name of the fiscal quarter or period in which the opportunity <code>CloseDate</code> falls. Use YYYY Q format, for example, '2006 1' for first quarter of 2006.</p>
FiscalQuarter	<p><b>Type</b> int</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> Represents the fiscal quarter. Valid values are 1, 2, 3, or 4.</p>
FiscalYear	<p><b>Type</b> int</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> Represents the fiscal year, for example, 2006.</p>
ForecastCategory	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Restricted picklist, Sort</p> <p><b>Description</b> Restricted picklist field. It is implied, but not directly controlled, by the <code>StageName</code> field. You can override this field to a different value than is implied by the <code>StageName</code> value. The values of this field are fixed enumerated values. The field labels are localized to the language of the user performing the operation, if localized versions of those labels are available for that language in the user interface.  In API version 12.0 and later, the value of this field is automatically set based on the value of the <code>ForecastCategoryName</code> and can't be updated any other way. The field properties Create, Defaulted on create, Nillable, and Update are not available in version 12.0.  Possible values are:</p> <ul style="list-style-type: none"> <li>• BestCase</li> <li>• Closed</li> <li>• Forecast</li> <li>• MostLikely</li> <li>• Omitted</li> <li>• Pipeline</li> </ul>
ForecastCategoryName	<p><b>Type</b> picklist</p>

Field	Field Type
	<p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The name of the forecast category. It is implied, but not directly controlled, by the <code>StageName</code> field. You can override this field to a different value than is implied by the <code>StageName</code> value. Available in API version 12.0 and later.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• Best Case</li> <li>• Closed</li> <li>• Commit</li> <li>• Most Likely</li> <li>• Omitted</li> <li>• Pipeline</li> </ul>
<code>HasOpenActivity</code>	<p><b>Type</b> boolean</p> <p><b>Properties</b> Defaulted on create, Group,</p> <p><b>Description</b> Indicates whether an opportunity has an open event or task (<code>true</code>) or not (<code>false</code>). Available in API version 35.0 and later.</p>
<code>HasOpportunityLineItem</code>	<p><b>Type</b> boolean</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Sort</p> <p><b>Description</b> Read-only field that indicates whether the opportunity has associated line items. A value of <code>true</code> means that Opportunity line items have been created for the opportunity. An opportunity can have opportunity line items only if the opportunity has a price book. The opportunity line items must correspond to <code>PricebookEntry</code> objects that are listed in the opportunity <code>Pricebook2</code>. However, you can insert opportunity line items on an opportunity that does not have an associated <code>Pricebook2</code>. For the first opportunity line item that you insert on an opportunity without a <code>Pricebook2</code>, the API automatically sets the <code>Pricebook2Id</code> field, if the opportunity line item corresponds to a <code>PricebookEntry</code> in an active <code>Pricebook2</code> that has a <code>CurrencyIsoCode</code> field that matches the <code>CurrencyIsoCode</code> field of the opportunity. If the <code>Pricebook2</code> is not active or the <code>CurrencyIsoCode</code> fields do not match, then the API returns an error. You can't update the <code>Pricebook2Id</code> or <code>PricebookId</code> fields if opportunity line items exist on the Opportunity. You must delete the line items before attempting to update the <code>PricebookId</code> field.</p>

Field	Field Type
HasOverdueTask	<p><b>Type</b> boolean</p> <p><b>Properties</b> Defaulted on create, Group,</p> <p><b>Description</b> Indicates whether an opportunity has an overdue task (<code>true</code>) or not (<code>false</code>). Available in API version 35.0 and later.</p>
IqScore	<p><b>Type</b> int</p> <p><b>Properties</b> Aggregate, Filter, Group, Nillable, Sort</p> <p><b>Description</b> The likelihood, measured on a scale of 1 to 99, that an opportunity will be won. Einstein Opportunity Scoring must be enabled. Available in API version 41.0 and later. Label is <b>Opportunity Score</b>.</p>
IsClosed	<p><b>Type</b> boolean</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Sort</p> <p><b>Description</b> Directly controlled by <code>StageName</code>. You can query and filter on this field, but you can't directly set it in a create, upsert, or update request. It can only be set via <code>StageName</code>. Label is <b>Closed</b>.</p>
IsDeleted	<p><b>Type</b> boolean</p> <p><b>Properties</b> Defaulted on create, Filter</p> <p><b>Description</b> Indicates whether the object has been moved to the Recycle Bin (<code>true</code>) or not (<code>false</code>). Label is <b>Deleted</b>.</p>
IsExcludedFromTerritory2Filter	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> Used for Filter-Based Opportunity Territory Assignment (Pilot in Spring '15 / API version 33). Indicates whether the opportunity is excluded (<code>True</code>) or included (<code>False</code>) each time the APEX filter is executed.</p>

Field	Field Type
IsPriorityRecord	<p><b>Type</b> boolean</p> <p><b>Properties</b> Defaulted on create, Group</p> <p><b>Description</b> Shows whether the user has marked the opportunity as important (<i>True</i>) or not (<i>False</i>). The default value is <i>False</i>. Available in API version 53.0 and later.</p>
IsPrivate	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> If <i>true</i>, only the opportunity owner, users above that role in the hierarchy, and admins can view the opportunity or query it via the API. When you mark opportunities as private, opportunity teams, opportunity splits, and sharing are removed. Label is <b>Private</b>. The default value is <i>False</i>.</p>
IsSplit	<p><b>Type</b> boolean</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Sort</p> <p><b>Description</b> Read-only field that indicates whether credit for the opportunity is split between opportunity team members. Label is <b>IsSplit</b>. This field is available in versions 14.0 and later for organizations that enabled Opportunity Splits during the pilot period.  This field should not be used. However, it's documented for the benefit of pilot customers who find references to <b>IsSplit</b> in code.</p>
IsWon	<p><b>Type</b> boolean</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Sort</p> <p><b>Description</b> Directly controlled by <b>StageName</b>. You can query and filter on this field, but you can't directly set the value. It can only be set via <b>StageName</b>. Label is <b>Won</b>.</p>
LastActivityDate	<p><b>Type</b> date</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p>

Field	Field Type
	<p><b>Description</b></p> <p>Value is one of the following, whichever is the most recent:</p> <ul style="list-style-type: none"> <li>• Due date of the most recent event logged against the record.</li> <li>• Due date of the most recently closed task associated with the record.</li> </ul>
LastActivityInDays	<p><b>Type</b> int</p> <p><b>Properties</b> Aggregate, Filter, Group, Nillable, Sort</p> <p><b>Description</b> The number of days since the last completed event or task for the record, calculated by the current date minus the <code>last_activity</code> field. If the <code>last_activity</code> field is null, this field is null. This field is available in API version 52.0 and later if you enabled Pipeline Inspection.</p>
LastAmountChangedHistoryId	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> ID of the OpportunityHistory record that contains information about when the opportunity Amount field was last updated in Winter '21 or later. Information includes the date and time of the change and the user who made the change. Available in API version 50.0 and later. This is a relationship field.</p> <p><b>Relationship Name</b> LastAmountChangedHistory</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> OpportunityHistory</p>
LastCloseDateChangedHistoryId	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> ID of the OpportunityHistory record that contains information about when the opportunity Close Date field was last updated in Winter '21 or later. Information includes the date and time of the change and the user who made the change. Available in API version 50.0 and later. This is a relationship field.</p>

Field	Field Type
	<p><b>Relationship Name</b> LastCloseDateChangedHistory</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> OpportunityHistory</p>
LastReferencedDate	<p><b>Type</b> datetime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp when the current user last accessed this record, a record related to this record, or a list view.</p>
LastStageChangeDate	<p><b>Type</b> datetime</p> <p><b>Properties</b> Aggregate, Filter, Nillable, Sort</p> <p><b>Description</b> The date of the last change made to the <code>stage</code> field on this opportunity record. This field is available in API version 52.0 and later.</p>
LastStageChangeInDays	<p><b>Type</b> int</p> <p><b>Properties</b> Aggregate, Filter, Group, Nillable, Sort</p> <p><b>Description</b> The number of days since the last change was made to the <code>stage</code> field on the opportunity record, calculated by the current date minus the <code>last_stage_change_date</code> field. If the <code>last_stage_change_date</code> is null, then this field contains the value for <code>AgeInDays</code>. This field is available in API version 52.0 and later if you enabled Pipeline Inspection.</p>
LastViewedDate	<p><b>Type</b> datetime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> 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 (<code>LastReferencedDate</code>) but not viewed it.</p>

Field	Field Type
LeadSource	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Source of this opportunity, such as Advertisement or Trade Show.</p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, idLookup, Sort, Update</p> <p><b>Description</b> Required. A name for this opportunity. Limit: 120 characters.</p>
NextStep	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Description of next task in closing opportunity. Limit: 255 characters.</p>
OwnerId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> ID of the User who has been assigned to work this opportunity. If you update this field, the previous owner's access becomes Read Only or the access specified in your organization-wide default for opportunities, whichever is greater. If you have set up opportunity teams in your organization, updating this field has different consequences depending on your version of the API:           <ul style="list-style-type: none"> <li>For API version 12.0 and later, sharing records are kept, as they are for all objects. (All previous opportunity team members are kept on the opportunity team.)</li> <li>For API version before 12.0, sharing records are deleted. (All previous opportunity team members are removed from the opportunity team.)</li> <li>For API version 16.0 and later, users must have the Transfer Record permission in order to update (transfer) account ownership using this field.</li> </ul>           This is a relationship field.         </p> <p><b>Relationship Name</b> Owner</p>

Field	Field Type
	<p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> User</p>
PartnerAccountId	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> ID of the partner account for the partner user that owns this opportunity. Available if Partner Relationship Management is enabled or if digital experiences is enabled and you have partner portal licenses.  If you are uploading opportunities using API version 15.0 or earlier, and one of the opportunities in the batch has a partner user as the owner, the <code>Partner Account</code> field on all opportunities in the batch is set to that partner user's account regardless of whether the partner user is the owner. In version 16.0, the <code>Partner Account</code> field is set to the appropriate account for the partner user that owns the opportunity. If the owner of the opportunity is not a partner user, this field remains empty.</p>
Pricebook2Id	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> ID of a related Pricebook2 object. The <code>Pricebook2Id</code> field indicates which Pricebook2 applies to this opportunity. The <code>Pricebook2Id</code> field is defined only for those organizations that have products enabled as a feature. You can specify values for only one field (<code>Pricebook2Id</code> or <code>PricebookId</code>)—not both fields. For this reason, both fields are declared nillable.  This is a relationship field.</p> <p><b>Relationship Name</b> Pricebook2</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> Pricebook2</p>
PricebookId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Nillable, Update</p>

Field	Field Type
	<p><b>Description</b> Unavailable as of version 3.0. As of version 8.0, the Pricebook object is no longer available. Use the Pricebook2Id field instead, specifying the ID of the Pricebook2 record.</p>
Probability	<p><b>Type</b> percent</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> Percentage of estimated confidence in closing the opportunity. It is implied, but not directly controlled, by the StageName field. You can override this field to a different value than what is implied by the StageName.</p> <p>If you're changing the Probability field through the API using a partner WSDL call, or an Apex <code>before</code> trigger, and the value may have several decimal places, we recommend rounding the value to a whole number. For example, the following Apex in a <code>before</code> trigger uses the <code>round</code> method to change the field value: <code>o.probability = o.probability.round();</code></p>
PushCount	<p><b>Type</b> int</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The number of times an opportunity's close date has been pushed out by one calendar month. For example, moving a close date from April to May counts as one push, but moving from April 1 to April 30 doesn't count. The total is not decreased when the close date is moved in. Available in API version 53.0 and later.</p>
RecordTypeId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Nillable, Update</p> <p><b>Description</b> ID of the record type assigned to this object.</p>
StageName	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> Required. Current stage of this record. The StageName field controls several other fields on an opportunity. Each of the fields can be directly set or implied by changing the StageName field. In addition, the StageName field is a picklist, so it has additional</p>

Field	Field Type
	<p>members in the returned describeSObjectResult to indicate how it affects the other fields. To obtain the stage name values in the picklist, query the OpportunityStage object. If the StageName is updated, then the ForecastCategoryName, IsClosed, IsWon, and Probability are automatically updated based on the stage-category mapping.</p>
SyncedQuoteID	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Nullable, Update</p> <p><b>Description</b> Read only in an Apex trigger. The ID of the Quote that syncs with the opportunity. Setting this field lets you start and stop syncing between the opportunity and a quote. The ID has to be for a quote that is a child of the opportunity.</p>
Territory2Id	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nullable, Sort, Update</p> <p><b>Description</b> The ID of the territory that is assigned to the opportunity. Available only if Enterprise Territory Management has been enabled for your organization. Users who have full access to an opportunity's account can assign any territory from the active model to the opportunity. Users who do <i>not</i> have full access to an opportunity's account can assign only a territory that is also assigned to the opportunity's account. The same restriction applies to territory assignments made via Apex in system mode.</p>
TotalOpportunityQuantity	<p><b>Type</b> double</p> <p><b>Properties</b> Create, Filter, Nullable, Sort, Update</p> <p><b>Description</b> Number of items included in this opportunity. Used in quantity-based forecasting.</p>
Type	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nullable, Sort, Update</p> <p><b>Description</b> Type of opportunity. For example, Existing Business or New Business. Label is <b>Opportunity Type</b>.</p>



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

## Usage

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

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



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

## Sample Code—Java

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

```
public void startQuoteSync() {
    Opportunity opp = new Opportunity();
    opp.setId(new ID("006D000000Cp0SY"));
    opp.setSyncedQuoteId(new ID("0Q0D0000000020Z"));
    // Invoke the update call and save the results
    try {
        SaveResult[] saveResults = binding.update(new SObject[] {opp});
        // check results and do more processing after the update call ...
    }
    catch (Exception ex) {
        System.out.println("An unexpected error has occurred." + ex.getMessage());
        return;
    }
}
```

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

```
public void stopQuoteSync() {
    Opportunity opp = new Opportunity();
    opp.setId(new ID("006D000000Cp0SY"));
    opp.setFieldsToNull(new String[] {"SyncedQuoteId"});
    // Invoke the update call and save the results
    try {
        SaveResult[] saveResults = binding.update(new SObject[] {opp});
        // check results and do more processing after the update call ...
    }
    catch (Exception ex) {
        System.out.println("An unexpected error has occurred." + ex.getMessage());
        return;
    }
}
```

## Associated Objects

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

### **OpportunityChangeEvent (API version 44.0)**

Change events are available for the object.

### **OpportunityFeed (API version 18.0)**

Feed tracking is available for the object.

### **OpportunityHistory**

History is available for tracked fields of the object.

### **OpportunityOwnerSharingRule**

Sharing rules are available for the object.

### **OpportunityShare**

Sharing is available for the object.

## Additional Considerations

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

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

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



**Note:** If errors occur on an opportunity product, you must return to the opportunity and fix the errors before cloning.

If any opportunity products contain unique custom fields, you must null them out before cloning the opportunity.

- The parent opportunity is saved according to the [order of execution](#).
- The opportunity products are saved according to the [order of execution](#).

## OpportunityLineItem

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

## Supported Calls

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

## Special Access Rules

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

## Fields

Field	Details
CanUseQuantitySchedule	<p><b>Type</b> boolean</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Sort</p> <p><b>Description</b> Indicates whether the opportunity product can have a quantity schedule (true) or not (false). This field is read-only.</p>
CanUseRevenueSchedule	<p><b>Type</b> boolean</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Sort</p> <p><b>Description</b> Indicates whether the opportunity product can have a revenue schedule (true) or not (false). This field is read-only.</p>
ConnectionReceivedId	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> ID of the PartnerNetworkConnection that shared this record with your organization. This field is available if you enabled Salesforce to Salesforce.</p>
ConnectionSentId	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> 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>
CurrencyIsoCode	<p><b>Type</b> picklist</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Restricted picklist, Sort</p>

Field	Details
	<p><b>Description</b>  Available only for organizations with the multicurrency feature enabled. Contains the ISO code for any currency allowed by the organization.</p> <p>If the organization has multicurrency enabled, and a Pricebook2 isn't specified on the parent opportunity (that is, the <code>Pricebook2Id</code> field is blank on the opportunity referenced by this object's <code>OpportunityId</code>), then the value of this field must match the currency of the <code>CurrencyIsoCode</code> field on the PricebookEntry records that are associated with this object.</p>
Description	<p><b>Type</b>  string</p> <p><b>Properties</b>  Create, Filter, Group, Nullable, Sort, Update</p> <p><b>Description</b>  Text description of the opportunity line item. Limit: 255 characters.</p>
Discount	<p><b>Type</b>  percent</p> <p><b>Properties</b>  Create, Filter, Nullable, Sort, Update</p> <p><b>Description</b>  Discount for the product as a percentage.</p> <p>When updating these records:</p> <ul style="list-style-type: none"> <li>• If you specify <code>Discount</code> without specifying <code>TotalPrice</code>, the <code>TotalPrice</code> is adjusted to accommodate the new <code>Discount</code> value, and the <code>UnitPrice</code> is held constant.</li> <li>• If you specify both <code>Discount</code> and <code>Quantity</code>, you must also specify either <code>TotalPrice</code> or <code>UnitPrice</code> so the system knows which one to automatically adjust.</li> </ul>
HasQuantitySchedule	<p><b>Type</b>  boolean</p> <p><b>Properties</b>  Defaulted on create, Filter, Group, Sort</p> <p><b>Description</b>  Read-only. Indicates whether a quantity schedule has been created for this object (<code>true</code>) or not (<code>false</code>).</p>
HasRevenueSchedule	<p><b>Type</b>  boolean</p> <p><b>Properties</b>  Defaulted on create, Filter, Group, Sort</p>

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

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

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

Field	Details
	<ul style="list-style-type: none"> <li>If you specify <code>Quantity</code> without specifying the <code>UnitPrice</code>, the <code>UnitPrice</code> value is adjusted to accommodate the new <code>Quantity</code> value, and the <code>TotalPrice</code> is held constant.</li> <li>If you specify both <code>Discount</code> and <code>Quantity</code>, you must also specify either <code>TotalPrice</code> or <code>UnitPrice</code> so the system can determine which one to automatically adjust.</li> </ul>
RecalculateTotalPrice	<p><b>Type</b> boolean</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Sort</p> <p><b>Description</b> Changes behavior of OpportunityLineItem calculations when a line item has child schedule rows for the <code>Quantity</code> value. When enabled, if the rollup quantity changes, then the quantity rollup value is multiplied against the sales price to change the total price. Product2 flag must be set to true.</p>
ServiceDate	<p><b>Type</b> date</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Date when the product revenue will be recognized and the product quantity will be shipped.</p> <ul style="list-style-type: none"> <li>Opportunity Close Date—<code>ServiceDate</code> is ignored.</li> <li>Product Date—<code>ServiceDate</code> is used if not <code>null</code>.</li> <li>Schedule Date—<code>ServiceDate</code> is used if not <code>null</code> and there are no revenue schedules present for this line item, that is, there are no <code>OpportunityLineItemSchedule</code> records with a field <code>Type</code> value of Revenue that are children of this record.</li> </ul>
SortOrder	<p><b>Type</b> int</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Number indicating the sort order selected by the user. Client applications can use this to match the sort order in Salesforce.</p>
Subtotal	<p><b>Type</b> currency</p> <p><b>Properties</b> Filter, Nillable, Sort</p>

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

## Usage

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

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

For a visual diagram of the relationships between OpportunityLineItem and other objects, see the [Product & Price Book](#) diagram.

**Note:**

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

## Effects on Opportunities

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

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

## Associated Objects

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

### **OpportunityLineItemChangeEvent (API version 60.0)**

Change events are available for the object.

## Pricebook2

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



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

## Supported Calls

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

## Fields

Field	Details
Description	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Text description of the price book.</p>
IsActive	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> 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 <b>Active</b>.</p>
IsArchived	<p><b>Type</b> boolean</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Sort</p> <p><b>Description</b> Indicates whether the price book has been archived (true) or not (false). This field is read only.</p>
IsDeleted	<p><b>Type</b> boolean</p> <p><b>Properties</b> Defaulted on create, Filter</p> <p><b>Description</b> Indicates whether the price book has been moved to the Recycle Bin (true) or not (false). Label is <b>Deleted</b>.</p>
IsStandard	<p><b>Type</b> boolean</p>

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

Field	Details
<b>Description</b>	The date and time when a Commerce price book is valid to. If this field is <code>null</code> , the price book is valid until it's deactivated. Available in API version 48.0 and later.

## Usage

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

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

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

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

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

## PriceBook2, Product2, and PricebookEntry Relationships

In the API:

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

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

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

For a visual diagram of the relationships between Pricebook2 and other objects, see [Product and Schedule Objects](#).

## Price Book Setup

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

1. Load product data into Product2 records (creating one Product2 record for each product that you want to add).

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

## Code Sample—Java

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

## Associated Objects

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

### [Pricebook2ChangeEvent \(API version 48.0\)](#)

Change events are available for the object.

### [Pricebook2History](#)

History is available for tracked fields of the object.

## Product2

Represents a product that your company sells.

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



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

## Supported Calls

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

## Special Access Rules

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

## Fields

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

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

Field	Details
	<p>This field is available in API version 58.0 and later.</p> <p>This field is available when Industries Automotive or Subscription Management is enabled.</p> <p>Possible values are:</p> <ul style="list-style-type: none"><li>• <b>Allowed</b>— Changes are allowed while adding line items to a bundle; for example, when adding products or editing quantity.</li><li>• <b>NotAllowed</b>—Changes aren't allowed.</li></ul>
CurrencyIsoCode	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> Available only for orgs with the multicurrency feature enabled. Contains the ISO code for any currency allowed by the org.</p>
Description	<p><b>Type</b> textarea</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> A text description of this record. Label is <b>Product Description</b>.</p>
DisplayUrl	<p><b>Type</b> url</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> URL leading to a specific version of a record in the linked external data source.</p>
ExternalDataSourceId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> ID of the related external data source.</p>
ExternalId	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p>

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

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

Field	Details
	<p><b>Description</b> If the product has a quantity schedule, the number of installments.</p>
NumberOfRevenueInstallments	<p><b>Type</b> int</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> If the product has a revenue schedule, the number of installments.</p>
ProductClass	<p><b>Type</b> picklist</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Restricted picklist, Sort</p> <p><b>Description</b> This field is read-only. Its value is determined by the value of the <code>Type</code> field and whether the product is associated with a <code>ProductAttribute</code> record. It describes whether a product is a bundle, set, or simple product, a variation parent, or a product variation. Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>Bundle</code>—This product is a parent or component in a product bundle.</li> <li>• <code>Set</code>—This product is included in a product set.</li> <li>• <code>Simple</code>—This product has no variations</li> <li>• <code>VariationParent</code>—This product is a variation parent. It's the base product for one or more product variations and, though it has its own stock-keeping unit (SKU), isn't a sellable entity. Instead, it's the parent of sellable entities—its variations.</li> <li>• <code>Variation</code>—This product is a variation of a parent product. Each variation has its own SKU.</li> </ul> <p>When the value of <code>ProductClass</code> = <code>VariationParent</code>, it never changes. The value of <code>ProductClass</code> changes between <code>Simple</code> and <code>Variation</code> when you attach or detach a <code>ProductAttribute</code> record to the product.</p> <p>If you attach a <code>ProductAttribute</code> record to a product, then the product's <code>ProductClass</code> value changes to <code>Variation</code>. Conversely, when you detach all <code>ProductAttribute</code> records from a product, the <code>ProductClass</code> value changes to <code>Simple</code>.</p> <p>The default value is <code>Simple</code>.</p> <p>This field is available in API version 50.0 and later. It was introduced to support of B2B and B2C Commerce implementations.</p>
ProductCode	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p>

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

Field	Details
RevenueScheduleType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The type of the revenue schedule, if the product has one.</p>
StockCheckMethod	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The method for how a product's inventory is checked. Stock checks on parent products are common when bundles are prepackaged and individual child components can't be sold separately. Stock checks on child products are common when bundles aren't prepackaged and must be put together during fulfillment. If bundles aren't prepackaged, child components can usually be sold separately.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>Null</code>—Check stock on the product SKU.</li> <li>• <code>DoNotCheck</code>—The stock shouldn't be checked.</li> <li>• <code>ParentProduct</code>—If the product is a parent of a bundle, check stock on the parent product.</li> <li>• <code>ChildProducts</code>—If the product is a parent of a bundle, check stock on the child components.</li> </ul>
StockKeepingUnit	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The SKU for the product. Use in tandem with or instead of the <code>ProductCode</code> field. For example, you can track the manufacturer's identifying code in the Product Code field and assign the product a SKU when you resell it.</p>
TaxPolicyId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The ID of the related tax policy.</p> <p>This field is available when Subscription Management is enabled. This field is available in API version 55.0 and later.</p>

Field	Details
	<p>This field is a relationship field.</p> <p><b>Relationship Name</b> TaxPolicy</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> TaxPolicy</p>
TransferRecordMode	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> If serialized, indicates when the serial number is recorded. This field is visible based on field-level security. The value affects the read-only value of the <code>Product2TransferMode</code> field on the <code>ProductTransfer</code> object. Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>SendAndReceive</code> —The serial number is recorded when sending or receiving.</li> <li>• <code>ReceiveOnly</code> —The serial number is recorded when receiving only.</li> </ul>
Type	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> The type of product. This field's value affects the read-only value of the <code>ProductClass</code> field on the <code>Product2</code> object. field.</p> <ul style="list-style-type: none"> <li>• <code>Base</code>—When <code>Type</code> = <code>Base</code>, then <code>ProductClass</code> = <code>VariationParent</code>.</li> <li>• <code>Null</code>—When <code>Type</code> = <code>Null</code>, then <code>ProductClass</code> = <code>Simple</code>.</li> </ul> <p>This field is available when B2B or B2C Commerce is enabled.</p> <p>This field is available in API version 50.0 and later.</p>
UnitOfMeasureId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The ID of the unit of measure associated with the product. This field is a relationship field.</p>

Field	Details
	This field is available when Revenue Cloud is enabled.
	This field is available in API version 63.0 and later.
<b>Relationship Name</b>	
	UnitOfMeasure
<b>Refers To</b>	
	UnitOfMeasure

## Schedule Enabled Flags

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

## Default Schedule Fields

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

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

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

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

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

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

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

## Usage

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

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

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

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

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

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

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

## Associated Objects

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

### [Product2ChangeEvent \(API version 44.0\)](#)

Change events are available for the object.

### [Product2Feed \(API version 18.0\)](#)

Feed tracking is available for the object.

### [Product2History](#)

History is available for tracked fields of the object.

### [Product2OwnerSharingRule \(API version 50.0\)](#)

Sharing rules are available for the object.

## Rebate Management Object in Design Registration

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

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

- [AccountAccountRelation on page 145](#)

# PRICE PROTECTION

Manage Price Protection programs for partners and distributors to ensure margin stability amid price fluctuations.

Available in: **Enterprise**, **Professional**, and **Unlimited** Editions with the Channel Revenue Management add on

## [Price Protection Standard Objects](#)

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

### EDITIONS

Available in: Lightning Experience

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

#### [PriceProtectExecLineItem](#)

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

#### [PriceProtectionExecution](#)

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

#### [PriceProtectionTerm](#)

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

#### [ProductDetectedPriceChange](#)

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

#### [Rebate Management Objects in Price Protection](#)

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

## PriceProtectExecLineItem

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

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

## Supported Calls

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

## Fields

Field	Details
AccountId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> References the partner account related to the transaction being evaluated for price protection. This field is a relationship field.</p> <p><b>Relationship Name</b> Account</p> <p><b>Refers To</b> Account</p>
CalculatedAmount	<p><b>Type</b> currency</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> Total protected amount calculated based on the applicable price difference and quantity.</p>
CalculationReferenceRecordId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> References the rebate or pricing rule used to compute the claim. This field is a relationship field.</p> <p><b>Relationship Name</b> CalculationReferenceRecord</p> <p><b>Refers To</b> ProgramRebateType</p>
ClaimReferenceId	<p><b>Type</b> reference</p>

Field	Details
	<p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Links to the related rebate claim, if one has been generated. This field is a polymorphic relationship field.</p>
	<p><b>Relationship Name</b> ClaimReference</p> <p><b>Refers To</b> RebateClaim</p>
HasWarnings	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> Indicates if the execution line item has associated warnings. The default value is <code>false</code>.</p>
InTransitQuantity	<p><b>Type</b> double</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> Quantity of the product in transit.</p>
IsEligible	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> Indicates whether the record qualifies for price protection. The default value is <code>false</code>.</p>
LastReferencedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp when the record was last referenced by a user or system.</p>

Field	Details
LastViewedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> Date and timestamp when the record was last opened in the UI.</p>
LocationId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> References the inventory or sales location relevant to the line item. This field is a relationship field.</p> <p><b>Relationship Name</b> Location</p> <p><b>Refers To</b> Location</p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p><b>Description</b> Auto-generated identifier for the line item record.</p>
NewSalePricePerUnit	<p><b>Type</b> currency</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The new sale price per unit after the price change.</p>
NewSalePriceType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Type of sale price applied post-adjustment (e.g., List Price, Net Price).</p>

Field	Details
PriceDifference	<p><b>Type</b> currency</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> Difference between the old and new sale price per unit. This field is a calculated field.</p>
PriceProtectionExecutionId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> Links to the parent Price Protection Execution record. This field is a relationship field.</p> <p><b>Relationship Name</b> PriceProtectionExecution</p> <p><b>Relationship Type</b> Master-detail</p> <p><b>Refers To</b> PriceProtectionExecution (the master object)</p>
PriceProtectionTermId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> References the Price Protection Term used for evaluating eligibility and calculations. This field is a relationship field.</p> <p><b>Relationship Name</b> PriceProtectionTerm</p> <p><b>Refers To</b> PriceProtectionTerm</p>
ProductId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> References the product involved in the price protection claim.</p>

Field	Details
	<p>This field is a relationship field.</p> <p><b>Relationship Name</b> Product</p> <p><b>Refers To</b> Product2</p>
RemainingQuantity	<p><b>Type</b> double</p> <p><b>Properties</b> Create, Filter, Sort, Update</p> <p><b>Description</b> Quantity of product still eligible for claim after partial adjustments.</p>
SalePricePerUnit	<p><b>Type</b> currency</p> <p><b>Properties</b> Create, Filter, Sort, Update</p> <p><b>Description</b> Original sale price per unit before the price adjustment.</p>
SalePriceType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Type of sale price recorded during the original transaction.</p>
Status	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> Current processing state of the line item. Possible values are:</p> <ul style="list-style-type: none"> <li>• Complete</li> <li>• Error</li> <li>• New</li> <li>• ReadyForClaim—Ready For Claim</li> <li>• ReadyForPricing—Ready For Pricing</li> <li>• ReadyForSimulation—Ready For Simulation</li> </ul>

Field	Details
StatusReason	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> Additional explanation or message associated with the current status.</p>
TransactionDate	<p><b>Type</b> date</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> Date when the original sale or transaction occurred.</p>
TransactionReferenceId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Reference to the transaction record from which this line item originates. This field is a polymorphic relationship field.</p> <p><b>Relationship Name</b> TransactionReference</p> <p><b>Refers To</b> PartnerUnsoldInventory</p>
WarningMessage	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> Descriptive warning associated with this line item, if applicable.</p>

## PriceProtectionExecution

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

## Supported Calls

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

## Fields

Field	Details
ExecutionJobId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Data processing engine instance responsible for creating price protection records. This field is a relationship field.</p> <p><b>Relationship Name</b> ExecutionJob</p> <p><b>Refers To</b> BatchCalcJobDefinition</p>
ExecutionReferenceNumber	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p><b>Description</b> Unique reference number generated by the Data Processing Engine for this execution. This can be used to associate related line items to the same execution.</p>
LastExecutionTime	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> Date and time when the price protection execution was last performed by the Data Processing Engine.</p>
LastReferencedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p>

Field	Details
	<p><b>Description</b></p> <p>The timestamp when the record was last referenced. This is used internally to optimize performance and user experience.</p>
LastViewedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nullable, Sort</p> <p><b>Description</b></p> <p>Date and timestamp when the record was last viewed in the Salesforce UI. Helps track user engagement.</p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p><b>Description</b></p> <p>Auto-generated name for the price protection execution record. Used as the primary identifier within the system.</p>
OwnerId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b></p> <p>Identifier for the user or group that owns this record.</p> <p>This field is a polymorphic relationship field.</p> <p><b>Relationship Name</b> Owner</p> <p><b>Refers To</b> Group, User</p>
PriceChangeEffectiveDate	<p><b>Type</b> date</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b></p> <p>Date when the new price goes into effect as part of the price protection execution.</p>

Field	Details
Status	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> Represents the current lifecycle status of the price protection execution process.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• Completed</li> <li>• New</li> <li>• Processing</li> </ul>

## PriceProtectionTerm

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

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

## Supported Calls

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

## Fields

Field	Details
CalculationReferenceRecordId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> Rebate type that's applicable for the claim amount calculation. This field is a relationship field.</p> <p><b>Relationship Name</b> CalculationReferenceRecord</p> <p><b>Refers To</b> ProgramRebateType</p>
IsPayable	<p><b>Type</b> boolean</p>

Field	Details
	<p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> Indicates whether the inventory is eligible for payment or refund after a price protection adjustment. The default value is <code>false</code>.</p>
LastReferencedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp when the record was last referenced by the current user. Useful for activity tracking.</p>
LastViewedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> Date and the timestamp when the record was last viewed by the user. Helps in understanding record engagement.</p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, idLookup, Sort, Update</p> <p><b>Description</b> Unique name for the Price Protection Term. This is typically used as a primary identifier for UI display or business logic.</p>
NewSalePriceType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Defines the type of new sale price applicable after a price protection scenario. This helps classify how the adjusted sale price can be handled.</p>
OwnerId	<p><b>Type</b> reference</p>

Field	Details
PriceProtection	<p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> Identifier for the user or group who owns the record. This field is a polymorphic relationship field.</p> <p><b>Relationship Name</b> Owner</p> <p><b>Refers To</b> Group, User</p>
PriceProtectionType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> Defines the type of price protection applied. Possible values are: <ul style="list-style-type: none"> <li>• PriceProtection—Price Protection</li> <li>• ReversePriceProtection—Reverse Price Protection</li> </ul> The default value is PriceProtection.</p>
SalePriceType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Specifies the type of sale price before price protection is applied. This helps calculate the protection delta during claim processing.</p>
SupportedPricePercent	<p><b>Type</b> percent</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> Indicates the percentage of the price that is supported for price protection. Helps calculate eligible claim amounts.</p>
SupportedQuantityPercent	<p><b>Type</b> percent</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Nillable, Sort, Update</p>

Field	Details
	<p><b>Description</b> Indicates the percentage of quantity that is eligible for price protection. Used to determine prorated reimbursement.</p>

## ProductDetectedPriceChange

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

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

## Supported Calls

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

## Fields

Field	Details
AccountId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> References the partner account for which the price change was detected. This field is a relationship field.</p> <p><b>Relationship Name</b> Account</p> <p><b>Refers To</b> Account</p>
EffectiveDate	<p><b>Type</b> date</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> Date when the new price becomes effective for the product.</p>
LastReferencedDate	<p><b>Type</b> dateTime</p>

Field	Details
	<p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp when the record was last referenced by the current user. Useful for activity tracking.</p>
LastViewedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> Date and the timestamp the record was last referenced by a user or system process.</p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, idLookup, Sort, Update</p> <p><b>Description</b> Unique name or identifier for the price change record.</p>
OwnerId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> User or group that owns this record. This is a polymorphic relationship field. This field is a polymorphic relationship field.</p> <p><b>Relationship Name</b> Owner</p> <p><b>Refers To</b> Group, User</p>
ProcessingStatus	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> Indicates the current processing stage of the price change. Possible values are:</p> <ul style="list-style-type: none"> <li>• Completed</li> <li>• Inactive</li> </ul>

Field	Details
	<ul style="list-style-type: none"><li>• New</li><li>• Processing—In Progress</li></ul>
ProductId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> References the product for which the price change was detected. This field is a relationship field.</p> <p><b>Relationship Name</b> Product</p> <p><b>Refers To</b> Product2</p>

## Rebate Management Objects in Price Protection

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

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

- [ProgramRebateType](#)
- [ProgramRebateTypeProduct](#) on page 167
- [RebateClaim](#) on page 169
- [RebateProgram](#) on page 196
- [RebateProgramMember](#) on page 199

# REBATE MANAGEMENT

Use Rebate Management to create rebate programs and define an incentive structure with benefits and corresponding qualification thresholds.

Rebate Management is available in Lightning Experience.

Available in: **Enterprise**, **Professional**, and **Unlimited** Editions that have Rebate Management enabled.

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## [Rebate Management Standard Objects](#)

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

## [Rebate Management Standard Invocable Actions](#)

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

## [Rebate Management Metadata API Types](#)

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

## [Rebate Management Business APIs](#)

Rebate Management Business APIs use REST endpoints. These REST APIs follow similar conventions as Connect REST APIs.

## [Data Processing Engine, Batch Management, and Monitor Workflow Services](#)

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

## Rebate Management Standard Objects

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

Rebate Management is available in Lightning Experience.

Available in: Enterprise, Unlimited, and Developer Editions.

### [AccountAccountRelation](#)

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

### [PartyRoleRelation](#)

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

[ProgramRebateType](#)

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

[ProgramRebateTypeBenefit](#)

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

[PgmRebateTypBnftMapping](#)

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

[ProgramRebateTypeFilter](#)

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

[ProgramRebateTypePayout](#)

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

[ProgramRebateTypPayoutSrc](#)

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

[ProgramRebateTypeProduct](#)

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

[ProgramRebateTypeReference](#)

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

[RebateClaim](#)

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

[RebateClaimAdjustment](#)

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

[RebateMemberAggregateItem](#)

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

[RebateMemberClaimAggregate](#)

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

[RebateMemberProductAggregate](#)

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

[RebatePartnerSpecialPrcTrm](#)

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

[RebatePayment](#)

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

[RebatePayoutAdjustment](#)

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

[RebateProgram](#)

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

[RebateProgramMember](#)

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

[RebateProgramMemberPayout](#)

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

[RebateProgramPayoutPeriod](#)

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

[RebatePtnrSpclPrcTrmBnft](#)

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

[ReceivedDocument](#)

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

[TransactionJournal](#)

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

[UnitOfMeasureConversion](#)

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

## AccountAccountRelation

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

## Supported Calls

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

## Fields

Field	Details
AccountId	Type
	reference

Field	Details
	<p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> ID of the account associated with this account account relationship. This field is a relationship field.</p> <p><b>Relationship Name</b> Account</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> Account</p>
EndDate	<p><b>Type</b> date</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The date when the relationship ends.</p>
HierarchyType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> Specifies the hierarchy between accounts that are related. Possible values are:<ul style="list-style-type: none"> <li>• Child</li> <li>• Parent</li> <li>• Peer</li> </ul>The default value is <code>Peer</code>.</p>
IsActive	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> Indicates whether the account is actively involved with the related account (true) or not (false). The default value is <code>false</code>.</p>

Field	Details
LastReferencedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp when the current user last accessed this record, a record related to this record, or a list view.</p>
LastViewedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp when the current user last viewed this record or list view.</p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p><b>Description</b> Name of the account account relationship.</p>
OwnerId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> ID of the owner of this object. This field is a polymorphic relationship field.</p> <p><b>Relationship Name</b> Owner</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> Group, User</p>
PartyRoleRelationId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p>

Field	Details
	<p><b>Description</b>            The relationship between two accounts.            This field is a relationship field.</p>
	<p><b>Relationship Name</b>            PartyRoleRelation</p>
	<p><b>Relationship Type</b>            Lookup</p>
	<p><b>Refers To</b>            PartyRoleRelation</p>
RelatedAccountId	<p><b>Type</b>            reference</p> <p><b>Properties</b>            Create, Filter, Group, Sort, Update</p> <p><b>Description</b>            The related account in the relationship.            This field is a relationship field.</p> <p><b>Relationship Name</b>            RelatedAccount</p> <p><b>Relationship Type</b>            Lookup</p> <p><b>Refers To</b>            Account</p>
RelatedInverseRecordId	<p><b>Type</b>            reference</p> <p><b>Properties</b>            Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b>            The record that specifies the inverse relationship between the accounts.            This field is a relationship field.</p> <p><b>Relationship Name</b>            RelatedInverseRecord</p> <p><b>Relationship Type</b>            Lookup</p> <p><b>Refers To</b>            AccountAccountRelation</p>
StartDate	<p><b>Type</b>            date</p>

Field	Details
	<p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p>
	<p><b>Description</b> The date when the relationship starts.</p>

## PartyRoleRelation

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

### Supported Calls

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

### Fields

Field	Details
LastReferencedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp when the current user last accessed this record, a record related to this record, or a list view.</p>
LastViewedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp when the current user last viewed this record or list view.</p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, idLookup, Sort, Update</p> <p><b>Description</b> Name of the party role relationship.</p>

Field	Details
OwnerId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> ID of the owner of this object. This field is a polymorphic relationship field.</p> <p><b>Relationship Name</b> Owner</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> Group, User</p>
RelatedInverseRecordId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The record that specifies the inverse relationship between the roles. This field is a relationship field.</p> <p><b>Relationship Name</b> RelatedInverseRecord</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> PartyRoleRelation</p>
RelatedRoleName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The role that's related to another role in the relationship.</p>
RelationshipObjectName	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> The object that's associated with the relationship.</p>

Field	Details
	<p>Possible values are:</p> <ul style="list-style-type: none"> <li>• Account_Account_Relationship—Account Account Relationship</li> <li>• Contact_Contact_Relationship—Contact Contact Relationship</li> </ul> <p>The default value is Account_Account_Relationship.</p>
RoleName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The name of the role in the relationship.</p>
ShouldCreateInverseRoleAuto	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort</p> <p><b>Description</b> Indicates whether a role record should be created automatically for the relationship (true) or not (false). The default value is false.</p>

## ProgramRebateType

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

### Supported Calls

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

### Fields

Field	Details
AccrualRate	<p><b>Type</b> double</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p>

Field	Details
<b>Description</b>	
The rate you want to accrue at for the rebate program member. This rate is in the same units as the specified measure type, for example percent or amount. This field is available in API version 52.0 and later.	
AggregateObjectName	<b>Type</b> picklist
<b>Properties</b>	
Create, Filter, Group, Nillable, Restricted picklist, Sort, Update	
<b>Description</b>	
Name of the custom aggregation entity. For example, RebateMemberProductAggregate.	
BenefitQualifierField	<b>Type</b> picklist
<b>Properties</b>	
Create, Filter, Group, Nillable, Restricted picklist, Sort, Update	
<b>Description</b>	
Represents an attribute in the aggregate object whose value will be used, in conjunction with Aggregate Field and Rebate Type Benefit Field attributes from the PgmRebateTypBnftMapping entity, to determine the Benefit Value from the ProgramRebateTypeBenefit entity.	
Possible values are:	
<ul style="list-style-type: none"> <li>• <b>GrowthAmount</b>—Rebate Member Product Aggregate:Growth Amount.</li> <li>• <b>GrowthAmountPercent</b>—Rebate Member Product Aggregate:Growth Amount Percent.</li> <li>• <b>GrowthQuantity</b>—Rebate Member Product Aggregate:Growth Quantity.</li> <li>• <b>GrowthQuantityPercent</b>—Rebate Member Product Aggregate:Growth Quantity Percent.</li> <li>• <b>PriorTotalQuantity</b>—Rebate Member Product Aggregate:Prior Total Quantity.</li> <li>• <b>PriorTotalTransactionAmount</b>—Rebate Member Product Aggregate:Prior Total Transaction Amount.</li> <li>• <b>TotalQuantity</b>—Rebate Member Product Aggregate:Total Quantity.</li> <li>• <b>TotalTransactionAmount</b>—Rebate Member Product Aggregate:Total Transaction Amount.</li> </ul>	
CalcObjectId	<b>Type</b> reference
<b>Properties</b>	
Create, Filter, Group, Nillable, Sort, Update	
<b>Description</b>	
Specifies the data processing engine definition used for the calculation. Only active data processing engine definitions can be used.	

Field	Details
	<p>Possible values are:</p> <ul style="list-style-type: none"> <li>• Aggregate By Member</li> <li>• Aggregate By Product</li> <li>• Account Hierarchy Member Aggregate</li> <li>• Process Per Transaction</li> <li>• Ship and Debit Member Aggregate</li> <li>• Year on Year Growth</li> </ul>
CalculationBasis	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> Specify the basis for rebate amount calculation. This field is available in API version 52.0 and later.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• Accrual: Accrual rate, if provided, or the benefit setup is used to calculate the rebate amount.</li> <li>• Payout: Benefit setup is used to calculate the rebate amount.</li> <li>• PayoutAndAccrual—Payout and Accrual: Benefit setup is used for payout , and accrual rate for accrual amount.</li> </ul> <p>The default value is 'Payout'.</p>
CalculationMethod	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> Specifies the rule for calculating rebate benefits.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• Retrospective</li> <li>• Stepped</li> </ul>
CalculationType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> Type of calculation for the rebate type.</p> <p>Possible values are:</p>

Field	Details
	<ul style="list-style-type: none"> <li>AggregateBased</li> <li>Custom</li> <li>GrowthBased</li> <li>PerTransaction</li> </ul>
FilterCriteria	<p><b>Type</b> textarea</p> <p><b>Properties</b> Nillable</p> <p><b>Description</b> Stores the rebate type filter definition in JSON format, which will be consumed by the Calc object.</p>
FilterLogic	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Contains the filter criteria options that are offered - AND, OR, Custom.</p>
IsInTransitQtyApplicable	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> Determine eligibility to include or exclude in-transit quantities The default value is <code>false</code>.</p>
IsIntegratable	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> This field determines if the rebate type record is of type template or not, based on which the record can be associated with an opportunity, contract, quote, or any other eligible object. The default value is 'false'.</p>
MeasureField	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p>

Field	Details
	<p><b>Description</b></p> <p>Stores the reference to the aggregate object that will be used for rebate amount calculations based on the measure type selected and the benefit value fetched.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>GrowthAmount</code>—Rebate Member Product Aggregate:Growth Amount.</li> <li>• <code>GrowthAmountPercent</code>—Rebate Member Product Aggregate:Growth Amount Percent.</li> <li>• <code>GrowthQuantity</code>—Rebate Member Product Aggregate:Growth Quantity.</li> <li>• <code>GrowthQuantityPercent</code>—Rebate Member Product Aggregate:Growth Quantity Percent.</li> <li>• <code>PriorTotalQuantity</code>—Rebate Member Product Aggregate:Prior Total Quantity.</li> <li>• <code>PriorTotalTransactionAmount</code>—Rebate Member Product Aggregate:Prior Total Transaction Amount.</li> <li>• <code>TotalQuantity</code>—Rebate Member Product Aggregate:Total Quantity.</li> <li>• <code>TotalTransactionAmount</code>—Rebate Member Product Aggregate:Total Transaction Amount.</li> </ul>
Name	<p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Create, Filter, Group, idLookup, Sort, Update</p> <p><b>Description</b></p> <p>Name of the program rebate type.</p>
ProductFilterType	<p><b>Type</b></p> <p>picklist</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b></p> <p>The criteria to be applied for the products present in the Included or Excluded Products list.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>ExcludeProducts</code>—Exclude Products</li> <li>• <code>IncludeProducts</code>—Include Products</li> </ul>
RebateMeasureType	<p><b>Type</b></p> <p>picklist</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b></p> <p>Type of rebate.</p>

Field	Details
	<p>Possible values are:</p> <ul style="list-style-type: none"> <li>• AmountperUnit</li> <li>• Custom</li> <li>• FixedAmount</li> <li>• PercentageOfRevenue</li> </ul>
RebateProgramId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> Reference to the rebate program.</p>
Status	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> Status of the rebate type.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• Active</li> <li>• Inactive</li> </ul>
UnitOfMeasureId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The unit of measure associated with the program rebate type. This field is available in API version 52.0 and later.</p> <p>This is a relationship field.</p> <p><b>Relationship Name</b> UnitOfMeasure</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> UnitOfMeasure</p>
ValidityDuration	<p><b>Type</b> int</p>

Field	Details
	<p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Duration for which the inventory is eligible for price protection/Duration of inventory eligibility for price protection</p>
ValidityDurationType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The unit of measure for the validity duration. Possible values are:</p> <ul style="list-style-type: none"> <li>Days</li> <li>Months</li> <li>Years</li> </ul> <p>The default value is Years.</p>

## Usage

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

## ProgramRebateTypeBenefit

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

## Supported Calls

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

## Fields

Field	Details
BenefitValue	<p><b>Type</b> double</p> <p><b>Properties</b> Create, Filter, Sort, Update</p>

Field	Details
	<p><b>Description</b> Rebate benefit at a level. For example, 3%, \$3000.</p>
EffectiveEndDate	<p><b>Type</b> date</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The date until when the program rebate type benefit is effective. If the date does not match a payout period end date, it isn't picked.</p>
EffectiveStartDate	<p><b>Type</b> date</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The date from when the program rebate type benefit is effective. If the date does not match a payout period start date, it isn't picked.</p>
MaximumMeasureFieldValue	<p><b>Type</b> double</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> Cap the measure value at a certain figure. For example, pay 1% on \$100,000 even when the members do more than that.</p>
MaximumQualifyingValue	<p><b>Type</b> double</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> Upper limit of quantity or revenue at a level.</p>
MinimumQualifyingValue	<p><b>Type</b> double</p> <p><b>Properties</b> Create, Filter, Sort, Update</p> <p><b>Description</b> Minimum quantity or revenue required to qualify to a level.</p>

Field	Details
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, idLookup, Sort, Update</p> <p><b>Description</b> Name of the qualification. For example, Tier 1/2/3, Gold/Silver.</p>
ProductId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Use this if the benefits vary by products. For example, Product A has a tier from 1- 100 units for \$20 and Product B has 1-100 units at \$19. To use product or any dimension to the benefits, add that field in benefit mapping</p>
Status	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> Status of the program rebate type benefit. Possible values are:<ul style="list-style-type: none"> <li>• Active</li> <li>• Inactive</li> </ul></p>

## Usage

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

## PgmRebateTypBnftMapping

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

## Supported Calls

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

## Fields

Field	Details
AggregateField	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> Used to describe the join conditions between the aggregate object and the Program Rebate Type Benefit entity.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• RebateMemberProductAggregate.GrowthAmount—Growth Amount</li> <li>• RebateMemberProductAggregate.GrowthAmountPercent—Growth Amount Percent</li> <li>• RebateMemberProductAggregate.GrowthQuantity—Growth Quantity</li> <li>• RebateMemberProductAggregate.GrowthQuantityPercent—Growth Quantity Percent</li> <li>• RebateMemberProductAggregate.LastReferencedDate—Last Referenced Date</li> <li>• RebateMemberProductAggregate.LastViewedDate—Last Viewed Date</li> <li>• RebateMemberProductAggregate.PriorTotalQuantity—Prior Total Quantity</li> <li>• RebateMemberProductAggregate.PriorTotalTransactionAmount—Prior Total Transaction Amount</li> <li>• RebateMemberProductAggregate.ProductId—Product ID</li> <li>• RebateMemberProductAggregate.ProgramRebateTypeId—Program Rebate ID</li> <li>• RebateMemberProductAggregate.RebateProgramMemberId—Rebate Program Member ID</li> <li>• RebateMemberProductAggregate.RebateProgramPayoutPeriodId—Rebate Program Payout Period ID</li> <li>• RebateMemberProductAggregate.TotalQuantity—Total Quantity</li> <li>• RebateMemberProductAggregate.TotalTransactionAmount—Total Transaction Amount</li> <li>• RebateMemberProductAggregate.TransactionJournalId—ID</li> </ul>
ProgramRebateTypeId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> Parent identifier</p>

Field	Details
RebateTypeBenefitField	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> Used to describe the join conditions between the aggregate object and the Program Rebate Type Benefit entity.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• <b>ProductId</b>—ID of the Product</li> </ul>

## ProgramRebateTypeFilter

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

### Supported Calls

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

### Fields

Field	Details
FilterField	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nullable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The field name to use for the program rebate type filter.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• <b>ActivityDate</b>—Activity date.</li> <li>• <b>CloneSourceId</b>—Cloned source ID.</li> <li>• <b>CreatedById</b>—Created by.</li> <li>• <b>CreatedDate</b>—Created date.</li> <li>• <b>ExternalTransactionNumber</b>—External transaction ID.</li> <li>• <b>Id</b>—ID</li> <li>• <b>IsDeleted</b>—Deleted.</li> <li>• <b>JournalDate</b>—Journal date.</li> <li>• <b>LastModifiedById</b>—Last modified by.</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>• <code>LastModifiedDate</code>—The most recent date on which a user modified this record.</li> <li>• <code>LastReferencedDate</code>—The most recent date on which a user referenced this record.</li> <li>• <code>LastViewedDate</code>—The most recent date on which a user viewed this record.</li> <li>• <code>MemberId</code>—Program Member</li> <li>• <code>Name</code></li> <li>• <code>OrderId</code>—Order</li> <li>• <code>OrderItemId</code>—Order Product.</li> <li>• <code>ProductCategoryId</code>—Product Category</li> <li>• <code>ProductId</code>—Product</li> <li>• <code>Quantity</code></li> <li>• <code>QuantityUnitOfMeasureId</code>—Quantity Unit</li> <li>• <code>SystemModstamp</code>—System Modstamp</li> <li>• <code>TransactionAmount</code>—Transaction Amount.</li> <li>• <code>UsageType</code>—Usage Type.</li> <li>• <code>UserRecordAccessId</code>—Object Access Level.</li> </ul>
Operator	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The filter operator.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>Contains</code>—in</li> <li>• <code>Equals</code>—equals</li> <li>• <code>Greater Than</code>—greater than</li> <li>• <code>Greater Than Or Equals</code>—greater or equal</li> <li>• <code>Less Than</code>—less than</li> <li>• <code>Less Than Or Equals</code>—less or equal</li> <li>• <code>Not Equals</code>—not equal to</li> </ul>
ProgramRebateTypeID	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> The parent program rebate type associated with the filter.</p>

Field	Details
Sequence	<p><b>Type</b> int</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The unique sequence number for each condition within the program rebate type filter.</p>
Value	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The value for filtering the program rebate type.</p>

## ProgramRebateTypePayout

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

### Supported Calls

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

### Fields

Field	Details
AccruedAmount	<p><b>Type</b> currency</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The accrued amount for the program rebate type payout. This is a calculated field.</p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, idLookup, Sort, Update</p>

Field	Details
	<p><b>Description</b> Name of the program rebate type.</p>
ProgramRebateTypeId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> Unique identifier for the program rebate type.</p>
RebateAmount	<p><b>Type</b> currency</p> <p><b>Properties</b> Filter, Nullable, Sort</p> <p><b>Description</b> Rebate amount. This is a calculated field.</p>
RebateProgramMemberPayoutId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> Unique identifier of the rebate program member payout.</p>
TotalBenefitQualifierValue	<p><b>Type</b> double</p> <p><b>Properties</b> Filter, Nullable, Sort</p> <p><b>Description</b> Roll-up summary of the Benefit Qualifier Value from the Program Rebate Type Payout Source entity. This is a calculated field.</p>
TotalMeasureValue	<p><b>Type</b> double</p> <p><b>Properties</b> Filter, Nullable, Sort</p> <p><b>Description</b> Roll-up summary for the Measure Value field from the Program Rebate Type Payout Source entity.</p>

Field	Details
	This is a calculated field.

## ProgramRebateTypPayoutSrc

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

### Supported Calls

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

### Fields

Field	Details
AccrualRate	<p><b>Type</b> double</p> <p><b>Properties</b> Create, Filter, Nullable, Sort, Update</p> <p><b>Description</b> The accrual rate for the program rebate type payout source. This field is available in API version 52.0 and later.</p>
AccruedAmount	<p><b>Type</b> currency</p> <p><b>Properties</b> Create, Filter, Nullable, Sort, Update</p> <p><b>Description</b> The accrued amount for the program rebate type payout source. This field is available in API version 52.0 and later.</p>
AggregateIdentifierId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nullable, Sort, Update</p> <p><b>Description</b> Unique identifier for the aggregate row.</p>
BenefitQualifierValue	<p><b>Type</b> double</p>

Field	Details
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> Value of the attribute from the aggregate object that is set up as Benefit Qualifier.
MeasureValue	<b>Type</b> double
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> Value of the attribute from the aggregate object that is set up as Measure Field.
MemberId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Sort
	<b>Description</b> Unique identifier for the member.
Name	<b>Type</b> string
	<b>Properties</b> Create, Filter, Group, idLookup, Sort, Update
	<b>Description</b> Name of the rebate program member.
ProgramRebateTypeBenefitId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> Program rebate type benefit identifier.
ProgramRebateTypePayoutId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Sort
	<b>Description</b> Unique identifier of the program rebate type payout.
RebateAmount	<b>Type</b> currency

Field	Details
	<p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p>
	<p><b>Description</b> Rebate amount calculated by invocable actions.</p>

## ProgramRebateTypeProduct

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

### Supported Calls

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

### Fields

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

Field	Details
<b>Relationship Type</b>	Lookup
<b>Refers To</b>	ProgramRebateType

## ProgramRebateTypeReference

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

### Supported Calls

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

### Fields

Field	Details
ProgramRebateTypeID	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The program rebate type associated with the record. This is a relationship field.</p> <p><b>Relationship Name</b> ProgramRebateType</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> ProgramRebateType</p>
ProgramRebateTypeSrcId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The source program rebate type associated to the contract, opportunity, or quote, or any other eligible standard or custom object. This is a relationship field.</p>

Field	Details
	<p><b>Relationship Name</b> ProgramRebateTypeSrc</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> ProgramRebateType</p>
ReferenceObjectId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The contract, opportunity, quote, or any other eligible standard or custom object associated with the program rebate type. This is a polymorphic relationship field.</p> <p><b>Relationship Name</b> ReferenceObject</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> Contract, Opportunity, Order, SalesAgreement</p>

## RebateClaim

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

## Supported Calls

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

## Fields

Field	Details
ApprovedAmount	<p><b>Type</b> currency</p> <p><b>Properties</b> Filter, Nillable, Sort</p>

Field	Details
	<p><b>Description</b> The approved rebate claim amount. Available in API version 58.0 and later.</p>
CalculatedAmount	<p><b>Type</b> currency</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The calculated rebate claim amount. Available in API version 58.0 and later.</p>
ClaimAmount	<p><b>Type</b> currency</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The amount for which rebate is claimed.</p>
ClaimDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The date when the claim is submitted by the claimant.</p>
ClaimType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> Specifies the type of the rebate claim. Available in API version 58.0 and later.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• PriceProtection—Price Protection</li> <li>• ReversePriceProtection—Reverse Price Protection</li> <li>• StandardRebate—Standard Rebate</li> <li>• C</li> </ul> <p>The default value is StandardRebate.</p>
ClaimedByAccountId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<b>Description</b>
	The account of the customer or distributor who is submitting the claim.
	This field is a relationship field.
	<b>Relationship Name</b>
	ClaimedByAccount
	<b>Relationship Type</b>
	Lookup
	<b>Refers To</b>
	Account
ClaimedByAccountNumber	<b>Type</b>
	string
	<b>Properties</b>
	Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b>
	The reference number of the account of the customer or distributor who is submitting the claim.
CurrencyIsoCode	<b>Type</b>
	picklist
	<b>Properties</b>
	Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	<b>Description</b>
	If multiple currencies are enabled, this field contains the currency ISO code associated with the record.
	Possible values are:
	<ul style="list-style-type: none"> <li>• EUR—Euro</li> <li>• USD—U.S. Dollar</li> </ul>
	The default value is EUR.
Description	<b>Type</b>
	textarea
	<b>Properties</b>
	Create, Filter, Nillable, Sort, Update
	<b>Description</b>
	The description of the rebate claim.
LastReferencedDate	<b>Type</b>
	dateTime
	<b>Properties</b>
	Filter, Nillable, Sort

Field	Details
	<p><b>Description</b> The most recent date on which a user referenced this record.</p>
LastViewedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The most recent date on which a user viewed this record.</p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p><b>Description</b> Autogenerated name of the rebate claim.</p>
OwnerId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> ID of the rebate claim record owner. This field is a polymorphic relationship field.</p> <p><b>Relationship Name</b> Owner</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> Group, User</p>
ParticipatingAccountId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The account of a participant in the claim. It can be the ship to/end customer or shipper/channel partner. This field is a relationship field.</p> <p><b>Relationship Name</b> ParticipatingAccount</p>

Field	Details
	<p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> Account</p>
ParticipatingAccountNumber	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The reference number of the account of a participant in the claim. It can be the ship to/end customer or shipper/ channel partner.</p>
ProcessingStatus	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The processing status of the rebate claim. Possible values are:<ul style="list-style-type: none"> <li>• Approved</li> <li>• Complete</li> <li>• In Review</li> <li>• New</li> <li>• Rejected</li> <li>• Reviewed</li> <li>• System Failed</li> <li>• System Processed</li> </ul>The default value is New.</p>
ProcessingStatusMessage	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The message with the details of the rebate claim's processing status when it isn't completed.</p>
ProductCode	<p><b>Type</b> string</p>

Field	Details
	<p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The reference number of the product for which the rebate claim is submitted.</p>
ProductId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The product for which the rebate claim is submitted.</p> <p>This field is a relationship field.</p> <p><b>Relationship Name</b> Product</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> Product2</p>
ProgramReferenceNumber	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The reference number of the rebate program.</p>
Quantity	<p><b>Type</b> double</p> <p><b>Properties</b> Create, Filter, Sort, Update</p> <p><b>Description</b> The quantity of the product for which the rebate claim is submitted.</p>
QuantityUnitOfMeasureId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The unit of measure of the quantity. Available in API version 58.0 and later.</p> <p><b>Relationship Name</b> QuantityUnitOfMeasure</p>

Field	Details
	<p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> UnitOfMeasure</p>
RebateMemberClaimAggregateId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nullable, Sort, Update</p> <p><b>Description</b> The rebate member claim aggregate record related to the rebate claim. Available in API version 58.0 and later.</p> <p><b>Relationship Name</b> RebateMemberClaimAggregate</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> RebateMemberClaimAggregate</p>
RebatePaymentId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nullable, Sort, Update</p> <p><b>Description</b> The rebate payment record related to the rebate claim. Available in API version 58.0 and later.</p> <p><b>Relationship Name</b> RebatePayment</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> RebatePayment</p>
ReceivedDocumentId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nullable, Sort, Update</p> <p><b>Description</b> The received document that this claim is part of. Available in API version 58.0 and later.</p> <p><b>Relationship Name</b> ReceivedDocument</p>

Field	Details
	<p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> ReceivedDocument</p>
ReferencePricePerUnit	<p><b>Type</b> currency</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The price of a product unit that's agreed upon between the manufacturer and the claimant by the manufacturer and the distributor or the manufacturer and the customer for the rebate claim.</p>
ResalePricePerUnit	<p><b>Type</b> currency</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The price at which the claimant bought the product.</p>
SalePricePerUnit	<p><b>Type</b> currency</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The original price at which a product unit is sold to the customer by the manufacturer.</p>
ShipDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The date when the product was shipped to end customer. Available in API version 58.0 and later.</p>
ShippedTransactionIdentifier	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p><b>Description</b>            The identifier of the transaction between distributor and end customer or ship to account. Available in API version 58.0 and later.</p>
TotalAdjustmentAmount	<p><b>Type</b>            currency</p> <p><b>Properties</b>            Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b>            The total amount adjusted on the rebate claim. Available in API version 58.0 and later.</p>
TransactionIdentifier	<p><b>Type</b>            string</p> <p><b>Properties</b>            Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b>            The unique identifier of the transaction between the manufacturer and distributor. Available in API version 58.0 and later.</p>
UsageType	<p><b>Type</b>            picklist</p> <p><b>Properties</b>            Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b>            Specifies the usage type of the rebate claim.            Possible value is:  <ul style="list-style-type: none"> <li>Automotive</li> <li>PriceProtection—Price Protection</li> <li>Rebates</li> </ul>           The default value is Rebates. Available in API version 58.0 and later.</p>

## RebateClaimAdjustment

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

### Supported Calls

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

## Fields

Field	Details
AdjustmentAmount	<p><b>Type</b> currency</p> <p><b>Properties</b> Create, Filter, Sort, Update</p> <p><b>Description</b> The adjustment amount for the rebate claim.</p>
ApprovedDate	<p><b>Type</b> date</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The date when the rebate claim adjustment was approved.</p>
Comments	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The details about the adjustment made to the rebate claim.</p>
CurrencyIsoCode	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The currency ISO code associated with the record. This is available when multiple currencies are enabled. Possible values are:           <ul style="list-style-type: none"> <li>EUR—Euro</li> <li>USD—U.S. Dollar</li> </ul>           The default value is EUR.</p>
LastReferencedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The most recent date on which a user referenced this record.</p>

Field	Details
LastViewedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The most recent date on which a user viewed this record.</p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, idLookup, Sort, Update</p> <p><b>Description</b> The name of the rebate claim adjustment.</p>
RebateClaimId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> The rebate claim record to which the adjustment was made. This field is a relationship field.</p> <p><b>Relationship Name</b> RebateClaim</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> RebateClaim</p>
Status	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The status of the adjustment made to the rebate claim. Possible values are:</p> <ul style="list-style-type: none"> <li>Approved</li> <li>InReview—Under Review</li> <li>Rejected</li> </ul> <p>The default value is InReview.</p>

## RebateMemberAggregateItem

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

### Supported Calls

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

### Fields

Field	Details
LastReferencedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nullable, Sort</p> <p><b>Description</b> The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nullable, Sort</p> <p><b>Description</b> 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><b>Type</b> string</p> <p><b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p><b>Description</b> Name of the rebate member aggregate item.</p>
OwnerId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> ID of the owner of this object. This field is a polymorphic relationship field.</p>

Field	Details
	<p><b>Relationship Name</b> Owner</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> Group, User</p>
PriorTransactionAmount	<p><b>Type</b> currency</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The transaction amount of the associated transaction journal record that contributes to aggregation for the configured prior period.</p>
PriorTransactionQuantity	<p><b>Type</b> double</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The transaction quantity of the associated transaction journal record that contributes to aggregation for the configured prior period.</p>
RebateAmount	<p><b>Type</b> currency</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The rebate amount for the associated transaction journal record.</p>
RebateMemberProductAggregateId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The rebate member product aggregate record associated with the transaction journal record. This is a relationship field.</p> <p><b>Relationship Name</b> RebateMemberProductAggregate</p> <p><b>Relationship Type</b> Lookup</p>

Field	Details
	<p><b>Refers To</b> RebateMemberProductAggregate</p>
TransactionAmount	<p><b>Type</b> currency</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The transaction amount for the transaction journal record associated with the aggregate item record.</p>
TransactionJournalId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The transaction journal associated with the rebate aggregated transaction journal record. This is a relationship field.</p> <p><b>Relationship Name</b> TransactionJournal</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> TransactionJournal</p>
TransactionQuantity	<p><b>Type</b> double</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The transaction quantity of the associated transaction journal record.</p>

## RebateMemberClaimAggregate

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

### Supported Calls

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

## Fields

Field	Details
CurrencyIsoCode	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The currency ISO code associated with the record. This is available when multiple currencies are enabled.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• EUR—Euro</li> <li>• USD—U.S. Dollar</li> </ul> <p>The default value is EUR.</p>
LastReferencedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The most recent date on which a user referenced this record.</p>
LastViewedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The most recent date on which a user viewed this record.</p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p><b>Description</b> The auto-generated name of the rebate member claim aggregate.</p>
OwnerId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> The ID of the rebate member claim aggregate record owner.</p>

Field	Details
	<p>This field is a polymorphic relationship field.</p> <p><b>Relationship Name</b> Owner</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> Group, User</p>
PriceType	<p><b>Type</b> Picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update.</p> <p><b>Description</b> Specifies the basis on which the product was sold in a rebate claim. Used to distinguish between standard and contract pricing strategies when calculating rebate eligibility.</p>
ProductId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The product for which the rebate claim was made. This field is a relationship field.</p> <p><b>Relationship Name</b> Product</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> Product2</p>
RebateProgramMemberId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The rebate program member for whom the claim was made. This field is a relationship field.</p> <p><b>Relationship Name</b> RebateProgramMember</p> <p><b>Relationship Type</b> Lookup</p>

Field	Details
	<p><b>Refers To</b> RebateProgramMember</p>
TotalClaimedAmount	<p><b>Type</b> currency</p> <p><b>Properties</b> Create, Filter, Sort, Update</p> <p><b>Description</b> The total amount that's already claimed.</p>
TotalClaimedQuantity	<p><b>Type</b> double</p> <p><b>Properties</b> Create, Filter, Sort, Update</p> <p><b>Description</b> The total product quantity that's already claimed.</p>

## RebateMemberProductAggregate

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

## Supported Calls

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

## Fields

Field	Details
AggregateReferenceNumber	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p><b>Description</b> A unique reference number of the aggregate record that's assigned by the Data Processing Engine when generating Rebate Program Member Aggregate records. This reference number can be used to relate Rebate Member Aggregate Item records to the aggregate record. Available in API version 54.0 and later.</p>

Field	Details
GrowthAmount	<p><b>Type</b> currency</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The difference between the total amount and the prior amount in the rebate aggregate.</p>
GrowthAmountPercent	<p><b>Type</b> double</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The difference between the total amount and the prior amount in percentage in the rebate aggregate.</p>
GrowthQuantity	<p><b>Type</b> double</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The difference between the total quantity and the previous quantity in the transaction journal associated with the rebate aggregate.</p>
GrowthQuantityPercent	<p><b>Type</b> double</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The quantity growth in percentage.</p>
LastReferencedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.</p>
LastViewedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p>

Field	Details
	<p><b>Description</b> 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><b>Type</b> string</p> <p><b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p><b>Description</b> Name of the rebate member product aggregate.</p>
OwnerId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> ID of the owner of this object. This field is a polymorphic relationship field.</p> <p><b>Relationship Name</b> Owner</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> Group, User</p>
PriorTotalQuantity	<p><b>Type</b> double</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The quantity in the corresponding payout period of the previous rebate cycle.</p>
PriorTotalTransactionAmount	<p><b>Type</b> currency</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The total transaction amount corresponding to the prior period.</p>
ProductId	<p><b>Type</b> reference</p>

Field	Details
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The product associated with the rebate aggregation.
ProgramRebateTypeID	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Sort, Update
	<b>Description</b> The program rebate type associated with the rebate aggregation.
RebatePayoutStatus	<b>Type</b> picklist
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	<b>Description</b> The status of the aggregate rebate payout to the member.
	Possible values are:
	<ul style="list-style-type: none"> <li>• Error</li> <li>• InProgress</li> <li>• Success</li> </ul>
	The default value is InProgress.
RebatePayoutStatusMessage	<b>Type</b> string
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The status message of the aggregate rebate payout to the member.
RebateProgramMemberID	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Sort, Update
	<b>Description</b> The rebate program member associated with the rebate aggregation.
RebateProgramPayoutPeriodID	<b>Type</b> reference

Field	Details
	<p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The rebate program payout period associated with the rebate aggregation.</p>
RollupProgramMemberId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The immediate parent account in the hierarchy of the account (rebate program member) associated with the product aggregate. This field is available in API version 52.0 and later. This is a relationship field.</p> <p><b>Relationship Name</b> RollupProgramMember</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> RebateProgramMember</p>
TotalQuantity	<p><b>Type</b> double</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The sum of values in transaction journal quantity fields associated with the rebate aggregation.</p>
TotalTransactionAmount	<p><b>Type</b> currency</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The sum of values in transaction journal transaction amount fields associated with the rebate aggregation.</p>
TransactionJournalId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The transaction journal associated with the program rebate type.</p>

## RebatePartnerSpecialPrcTrm

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

### Supported Calls

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

### Fields

Field	Details
CurrencyIsoCode	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The currency ISO code associated with the record. This is available when multiple currencies are enabled.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• EUR—Euro</li> <li>• USD—U.S. Dollar</li> </ul> <p>The default value is <code>EUR</code>.</p>
Discount	<p><b>Type</b> double</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The agreed discount for a product unit between the manufacturer and the distributor as part of the special pricing terms for a ship and debit program. Between <code>ReferencePricePerUnit</code> and <code>Discount</code>, only one field can be added or used.</p>
IsDiscountByPercent	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> Indicates whether the discount is given by percentage (<code>true</code>) or amount (<code>false</code>). The default value is <code>false</code>.</p>
LastReferencedDate	<p><b>Type</b> dateTime</p>

Field	Details
	<p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The most recent date on which a user referenced this record.</p>
LastViewedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The most recent date on which a user viewed this record.</p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, idLookup, Sort, Update</p> <p><b>Description</b> The user-defined name of the rebate partner special pricing term.</p>
OwnerId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> The ID of the rebate partner special pricing term. This field is a polymorphic relationship field.</p> <p><b>Relationship Name</b> Owner</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> Group, User</p>
ProductId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The product associated with the rebate partner special pricing term. This field is a relationship field.</p>

Field	Details
	<p><b>Relationship Name</b> Product</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> Product2</p>
ProductQtyUnitOfMeasureId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nullable, Sort, Update</p> <p><b>Description</b> The unit of measure associated with the product quantity. This field is a relationship field.</p> <p><b>Relationship Name</b> ProductQtyUnitOfMeasure</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> UnitOfMeasure</p>
ProductQuantity	<p><b>Type</b> double</p> <p><b>Properties</b> Create, Filter, Sort, Update</p> <p><b>Description</b> The threshold quantity for a product agreed between the manufacturer and the distributor as part of the special pricing terms for a ship and debit program.</p>
RebateProgramMemberId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The rebate program member associated with the rebate partner special pricing term. This field is a relationship field.</p> <p><b>Relationship Name</b> RebateProgramMember</p> <p><b>Relationship Type</b> Lookup</p>

Field	Details
	<p><b>Refers To</b> RebateProgramMember</p>
ReferencePricePerUnit	<p><b>Type</b> currency</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The price of a product unit that's agreed upon between the manufacturer and the distributor as part of the special pricing term. Between ReferencePricePerUnit and Discount, only one field can be added or used.</p>
SalePricePerUnit	<p><b>Type</b> currency</p> <p><b>Properties</b> Create, Filter, Sort, Update</p> <p><b>Description</b> The actual price of each unit of the product that's sold to the partner by the manufacturer.</p>
Status	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The status of the rebate partner special pricing term. Possible values are:<ul style="list-style-type: none"> <li>• Active</li> <li>• Draft</li> <li>• Inactive</li> </ul>The default value is <code>Draft</code>.</p>

## RebatePayment

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

### Supported Calls

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

## Fields

Field	Details
Amount	<p><b>Type</b> currency</p> <p><b>Properties</b> Create, Filter, Sort, Update</p> <p><b>Description</b> Amount to be paid out.</p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, idLookup, Sort, Update</p> <p><b>Description</b> Name of the rebate program.</p>
PaymentDate	<p><b>Type</b> date</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Date when payment is issued.</p>
Status	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> Status of the payout.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>Generated</li> <li>Paid</li> <li>Rejected</li> </ul>

## RebatePayoutAdjustment

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

## Supported Calls

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

## Fields

Field	Details
AdjustmentAmount	<p><b>Type</b> currency</p> <p><b>Properties</b> Create, Filter, Sort, Update</p> <p><b>Description</b> Value of the adjustment.</p>
ApprovedDate	<p><b>Type</b> date</p> <p><b>Properties</b> Create, Filter, Group, Nullable, Sort, Update</p> <p><b>Description</b> Approved date of the adjustment.</p>
Comments	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> Notes for adjustment.</p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, idLookup, Sort, Update</p> <p><b>Description</b> Name of the rebate program.</p>
RebateProgramMemberPayoutId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> Rebate program member payout identifier.</p>

Field	Details
Status	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> Status of adjustment.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• Approved</li> <li>• InReview—Under Review</li> <li>• Rejected</li> </ul>

## RebateProgram

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

### Supported Calls

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

### Fields

Field	Details
Description	<p><b>Type</b> textarea</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The description of the rebate program.</p>
EndDate	<p><b>Type</b> date</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The end date of the rebate program.</p>
Frequency	<p><b>Type</b> picklist</p>

Field	Details
	<p><b>Properties</b> Create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> The frequency of rebate program. Possible values are:</p> <ul style="list-style-type: none"> <li>• Annually</li> <li>• Biannually</li> <li>• CustomPeriods</li> <li>• Monthly</li> <li>• OnDemand</li> <li>• ProgramStartAndEndDate</li> <li>• Quarterly</li> </ul>
GracePeriodDayCount	<p><b>Type</b> int</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Number of days from end date of an instance of a payout period. Transactions submitted until this day are considered for rebate calculation. For example, a value of 5 implies that channel partners can submit transactions for a monthly period before the 5th of the next month. This isn't enforced in the system but can be used as information for channel partners.</p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, idLookup, Sort, Update</p> <p><b>Description</b> Name of the rebate program.</p>
PayoutCalculationDayCount	<p><b>Type</b> int</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Number of days from period end date. The payment will be calculated after this date. For example, a payout calculation day count of 14 means 14 days after period end date.</p>
ProgramReferenceNumber	<p><b>Type</b> string</p>

Field	Details
	<p><b>Properties</b> Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p><b>Description</b> The reference number assigned to this rebate program. This field is unique within your organization. This field is available in API version 52.0 and later.</p>
RebateProgramUrl	<p><b>Type</b> url</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> URL of the rebate program.</p>
StartDate	<p><b>Type</b> date</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> Start date of rebate program.</p>
Status	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> Possible states of rebate program. Possible values are:</p> <ul style="list-style-type: none"> <li>• Active</li> <li>• Draft</li> <li>• Inactive</li> </ul>
Type	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The type of the rebate program. Available in API version 58.0 and later. Possible values are:</p> <ul style="list-style-type: none"> <li>• ShipAndDebit</li> <li>• Standard</li> </ul>

Field	Details
	The default value is Standard.

## RebateProgramMember

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

### Supported Calls

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

### Fields

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

Field	Details
	<p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The latest date on which the program member was activated.</p>
LastDeactivationDate	<p><b>Type</b> date</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The latest date on which the program member was deactivated.</p>
MemberStatus	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> Status of membership. Possible values are:           <ul style="list-style-type: none"> <li>• Active</li> <li>• Inactive</li> </ul> </p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, idLookup, Sort, Update</p> <p><b>Description</b> Name of the member.</p>
RebateProgramId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> Reference to rebate program identifier.</p>
ShipToAccountId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
<b>Description</b>	The ship to account. Use this when the rebate is applicable only when the member ships to this account. This field is available in API version 52.0 and later.
	This is a relationship field.
<b>Relationship Name</b>	ShipToAccount
<b>Relationship Type</b>	Lookup
<b>Refers To</b>	Account

## RebateProgramMemberPayout

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

## Supported Calls

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

## Fields

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

Field	Details
CalculationDate	<p><b>Type</b> date</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Date on which the calculation happened.</p>
MemberId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> Program member ID.</p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, idLookup, Sort, Update</p> <p><b>Description</b> Name of the rebate program.</p>
Status	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> Status of payout. Possible values are:</p> <ul style="list-style-type: none"> <li>Approved</li> <li>Interim—Calculation In progress.</li> <li>Pending—Under review.</li> <li>Rejected</li> <li>SystemCalculated—Calculated.</li> </ul>
TotalApprovedAdjustmentAmount	<p><b>Type</b> currency</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> Summarized payout adjustment amount.</p>

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

## RebateProgramPayoutPeriod

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

### Supported Calls

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

### Fields

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

Field	Details
	<p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> Used to track total number of payouts that happened in a period for a particular rebate program.</p>
PayoutCalculationDate	<p><b>Type</b> date</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> Date on or after which the payout calculation for this period is set to Closed.</p>
RebateProgramId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> Rebate program identifier.</p>
StartDate	<p><b>Type</b> date</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> Start date of the period.</p>
Status	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> Used to track if a payout period is active or inactive. Possible values are:</p> <ul style="list-style-type: none"> <li>• Active</li> <li>• Closed</li> <li>• Inactive</li> </ul>
TotalApprovedAmount	<p><b>Type</b> currency</p>

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

## RebatePtnrSpclPrcTrmBnft

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

### Supported Calls

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

### Fields

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

Field	Details
	<p><b>Details</b></p> <ul style="list-style-type: none"> <li>• EUR—Euro</li> <li>• USD—U.S. Dollar</li> </ul> <p>The default value is EUR.</p>
Discount	<p><b>Type</b> double</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The discount that's applicable for the rebate partner special pricing term benefit.</p>
EffectiveEndDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The date until when the rebate partner special pricing term benefit is effective.</p>
EffectiveStartDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The date from when the rebate partner special pricing term benefit is effective.</p>
IsDiscountByPercent	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> Indicates whether the discount is given by percentage (<code>true</code>) or amount (<code>false</code>). The default value is <code>false</code>.</p>
LastReferencedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The most recent date on which a user referenced this record.</p>

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

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

## ReceivedDocument

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

### Supported Calls

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

### Fields

Field	Details
FailedRecordsFileDialog	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Lookup to the error file.</p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, idLookup, Sort, Update</p> <p><b>Description</b> The name of the received document.</p>
Status	<p><b>Type</b> picklist</p>

Field	Details
	<p><b>Properties</b> Create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> Current stage of processing. Possible values are:</p> <ul style="list-style-type: none"> <li>• APPROVED—Approved</li> <li>• ARCHIVED—Archived</li> <li>• DRAFT—Draft</li> <li>• IN REVIEW—In Review</li> <li>• OBSOLETE—Obsolete</li> <li>• SUBMITTED—Submitted</li> <li>• SUPERSEDED—Superseded</li> </ul>
UnprocessedRecordsFileId	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Lookup to the skipped file.</p>

## TransactionJournal

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

### Supported Calls

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

### Fields

Field	Details
AccountId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The account for which the transaction is made.</p>

Field	Details
	<p>This is a relationship field.</p> <p><b>Relationship Name</b> Account</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> Account</p>
ActivityDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Create, Filter, Sort, Update</p> <p><b>Description</b> Date the transaction happened.</p>
ErrorDescription	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> Description of the error in the journal record.</p>
JournalDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> Date the transaction was received.</p>
MemberId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> Polymorphic key to RebateProgramMember or LoyaltyMember.</p>
ProductId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p><b>Description</b> The product associated with the transaction.</p>
Quantity	<p><b>Type</b> double</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> The order quantity.</p>
QuantityUnitOfMeasureId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The unit of measure associated with the record. This is a relationship field.</p> <p><b>Relationship Name</b> QuantityUnitOfMeasure</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> UnitOfMeasure</p>
RebatePgmReferenceNumber	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The reference number of the rebate program. This field is available in API version 52.0 and later.</p>
ShipToAccountId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The account for which the additional benefit is being offered for ship and debit program. This field is available in API version 52.0 and later. This is a relationship field.</p>

Field	Details
	<p><b>Relationship Name</b> ShipToAccount</p>
	<p><b>Relationship Type</b> Lookup</p>
	<p><b>Refers To</b> Account</p>
TransactionAmount	<p><b>Type</b> currency</p> <p><b>Properties</b> Create, Filter, Nullable, Sort, Update</p> <p><b>Description</b> The total amount of the transaction.</p>
UsageType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nullable, Restricted picklist, Sort</p> <p><b>Description</b> Type of journal record. Possible values are:</p> <ul style="list-style-type: none"> <li>• Loyalty</li> <li>• Rebates</li> </ul>

## UnitOfMeasureConversion

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

### Supported Calls

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

### Fields

Field	Details
ConversionFactor	<p><b>Type</b> double</p>

Field	Details
	<p><b>Properties</b> Create, Filter, Sort, Update</p> <p><b>Description</b> The conversion factor for the conversion.</p>
FromUnitOfMeasureId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The unit of measure to be converted. This is a relationship field.</p> <p><b>Relationship Name</b> FromUnitOfMeasure</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> UnitOfMeasure</p>
ToUnitOfMeasureId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort, Update</p> <p><b>Description</b> The unit of measure to be converted to. This is a relationship field.</p> <p><b>Relationship Name</b> ToUnitOfMeasure</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> 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.

### UnitOfMeasureConversionFeed

Feed tracking is available for the object.

**UnitOfMeasureConversionHistory**

History is available for tracked fields of the object.

**UnitOfMeasureConversionOwnerSharingRule**

Sharing rules are available for the object.

**UnitOfMeasureConversionShare**

Sharing is available for the object.

## Rebate Management Standard Invocable Actions

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

[Add Rebate Member List](#)

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

[Calculate Rebate Amount and Upsert Payout](#)

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

[Calculate Projected Rebate Amount](#)

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

[Generate Rebate Payout Periods](#)

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

[Get Benefit and Calculate Rebate Amount](#)

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

[Get Eligible Program Rebate Types](#)

Retrieve the eligible program rebate types for a mapped object.

[Process Program Rebate Type Products](#)

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

[Process Rebate Batch Calculation Jobs](#)

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

[Process Rebate CSV Files](#)

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

[Upsert Custom Rebate Payout](#)

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

## Add Rebate Member List

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

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

## Supported REST HTTP Methods

### URI

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

### Formats

JSON, XML

### HTTP Methods

GET, HEAD, POST

### Authentication

Authorization: Bearer **token**

## Inputs

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

## Usage

### Sample Request

```
{
  "inputs": [
    "listViewId": "a07B0000007qbQOIAy",
    "rebateProgramId": "x18Z1236547qbQOBCv",
```

```

    "status": "Active"
    "notificationPreference": "BlockAllEmails"
  }
}

```

### Sample Response

```

{
  "isSuccess":true
}

```

## Calculate Rebate Amount and Upsert Payout

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

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

### Supported REST HTTP Methods

#### URI

/services/data/v~~xx~~.**x**/actions/standard/calculateRebateAmountAndUpsertPayout

#### Formats

JSON, XML

#### HTTP Methods

GET, HEAD, POST

#### Authentication

Authorization: Bearer **token**

### Inputs

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

## Outputs

Output	Details
programRebateTypePayoutSourceId	<p><b>Type</b> ID</p> <p><b>Description</b> The ID of the program rebate type payout source record, which is generated if the request is successful.</p>

## Usage

### Sample Request

```
{
  "inputs": [
    {"aggregateId": "a00xx000000cCtxAAE"},  

    {"aggregateId": "a00xx000000cCvZAAU"},  

    {"aggregateId": "a00xx000000cCxBAAU"}  

  ]
}
```

### Sample Response

```
{
  "errors": null,  

  "isSuccess": true,  

  "outputValues": {  

    "programRebateTypePayoutSourceId": "0ntxx00004000002AAA"  

  }
}
```

## Calculate Projected Rebate Amount

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

This object is available in API version 54.0 and later.

## Supported REST HTTP Methods

### URI

/services/data/v~~XX~~.**X**/actions/standard/calculateProjectedRebateAmount

### Formats

JSON

### HTTP Methods

POST

### Authentication

Authorization: Bearer **token**

## Inputs

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

## Outputs

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



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

## Usage

### JSON Sample Request

```
{
  "inputs": [ {
    "programRebateTypeIds": ["0hvRM0000004CuT"],
    "referenceRecordId": "801RM00000083TeYAI"
  } ]
}
```

**JSON Sample Response**

```
{
  "projectedRebateAmountCalc": [
    {
      "programRebateTypeId": "0hvRM0000004CuT",
      "referenceRecordId": "801RM00000083TeYAI",
      "totalProjectedRebateAmount": 1088000,
      "detailedProjectedRebateAmountCalc": [
        {
          "benefitQualifierValue": 500,
          "benefitTier": "0huRM0000004CRC",
          "rebateTypeBenefit": "5",
          "measureFieldValue": 160000,
          "payoutPeriod": "0i7RM0000004CV7",
          "projectedRebateAmount": 800000,
          "qualifiedTiers": [
            "0huRM0000004CRC"
          ]
        },
        {
          "benefitQualifierValue": 240,
          "benefitTier": "0huRM0000004CRC",
          "rebateTypeBenefit": "5",
          "measureFieldValue": 57600,
          "payoutPeriod": "0i7RM0000004CV7",
          "projectedRebateAmount": 288000,
          "qualifiedTiers": [
            "0huRM0000004CRC"
          ]
        }
      ]
    }
  ]
}
```

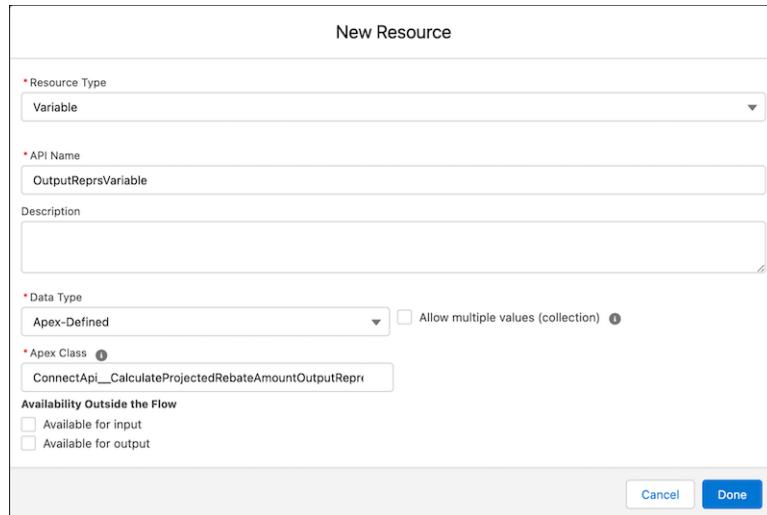
**Details of the Apex output type**

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

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

## Usage

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



New Resource

\*Resource Type  
Variable

\*API Name  
OutputReprsVariable

Description

\*Data Type  
Apex-Defined  Allow multiple values (collection)

\*Apex Class  
ConnectApi\_\_CalculateProjectedRebateAmountOutputRepr

Availability Outside the Flow  
 Available for input  
 Available for output

Cancel Done

## Generate Rebate Payout Periods

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

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

## Supported REST HTTP Methods

### URI

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

### Formats

JSON, XML

**HTTP Methods**

GET, HEAD, POST

**Authentication**Authorization: Bearer **token****Inputs**

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

**Outputs**

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

**Usage****Sample Request**

```
{
  "inputs": [ {"rebateProgramId": "01cxx00004000002AAA"} ,
    {"rebateProgramId": "01cxx00004000002AAA"} ]
}
```

**Sample Response**

```
{
  "errors":null,
  "isSuccess":true,
  "RebateProgramPayoutPeriodIds": ["0ntxx00004000002AAA", "0ntxx00004000002AAB"]
}, {
  "errors":null,
  "isSuccess":true,
  "RebateProgramPayoutPeriodIds": ["0ntxx00004000002AAA", "0ntxx00004000002AAB"]
}
```

## Get Benefit and Calculate Rebate Amount

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

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

## Supported REST HTTP Methods

### URI

`/services/data/vXX.X/actions/standard/getBenefitAndCalculateRebateAmount`

### Formats

JSON, XML

### HTTP Methods

GET, HEAD, POST

### Authentication

Authorization: Bearer **token**

## Inputs

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

## Outputs

Output	Details
accrualRate	<p><b>Type</b> Double</p>

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

## Usage

### Sample Request

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

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

### Sample Response

```
{
  "errors":null,
  "isSuccess":true,
  "outputValues":{
    "AggregateId":"0ntxx0004000002AAA",
    "BenefitId":"0ntxx0004000002AAA",
    "RebateAmount":"2000"
  }
}
```

## Get Eligible Program Rebate Types

Retrieve the eligible program rebate types for a mapped object.

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

This object is available in API version 52.0 and later.

### Supported REST HTTP Methods

#### URI

`/services/data/vxx.x/actions/standard/getEligibleProgramRebateTypes`

#### Formats

JSON

#### HTTP Methods

POST

#### Authentication

`Authorization: Bearer token`

## Inputs

Input	Details
<code>appliedRebateTypesLimit</code>	<p><b>Type</b> integer</p> <p><b>Description</b> The maximum number of search results to be returned for the applied rebate types. The input value is passed through to the output parameter.</p> <p>This field is available in API version 54.0 and later.</p>

Input	Details
appliedRebateTypesOffset Input	<p><b>Type</b> integer</p> <p><b>Description</b> The input offset for the applied rebate types search results plus the number of applied rebates types processed. Used to process applied rebate types in a loop. When all applied rebate types have been processed, zero is returned.</p> <p>This field is available in API version 54.0 and later.</p>
limit	<p><b>Type</b> integer</p> <p><b>Description</b> The maximum number of search results to be returned for the eligible rebate types.</p>
measureTypeFilter	<p><b>Type</b> array</p> <p><b>Description</b> Filters the eligible rebate types by the specified measure type.</p>
offset	<p><b>Type</b> integer</p> <p><b>Description</b> The offset for the eligible rebate types search results. The offset parameter specifies the end of the last batch retrieved. For example, to retrieve 100 rebate types at a time:</p> <ul style="list-style-type: none"> <li>• Request the first 100 with an offset of 0.</li> <li>• Request the second 100 with an offset of 100.</li> <li>• Request the third 100 with an offset of 200.</li> </ul>
queryOnlyIntegrableProgram RebateTypes	<p><b>Type</b> boolean</p> <p><b>Description</b> Indicates whether only integrable program rebate types must be queried.</p>
referenceObjectIds	<p><b>Type</b> array</p> <p><b>Description</b> Required. The list of IDs of the mapped object for which to get the eligible rebate types.</p>
searchByRebateTypeName	<p><b>Type</b> string</p> <p><b>Description</b> Searches the eligible rebate types by the specified name.</p>

## Outputs

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

## Usage

### JSON Sample Request

```
{
  "inputs": [
    {
      "referenceObjectIds": ["0lcxx00004000002AAA", "0lcxx00004000002AAB"],
      "queryOnlyIntegratableProgramRebateTypes": true,
      "limit": 10,
      "offset": 5
    }
  ]
}
```

### JSON Sample Response

```
{
  resultantRebateTypes: {
    "isSuccess": true,
    "programRebateTypeIDs": [
      {ReferenceObjectID: "0lcxx00004000002AAA", eligibleRebateTypes: [0lcxx00004000003AAA, 0lcxx00004000003AAB], appliedRebateTypes: [0lcxx00004000004AAA, 0lcxx00004000004AAB]},
      {ReferenceObjectID: "0lcxx00004000002AAB", eligibleRebateTypes: [0lcxx00004000003AAC, 0lcxx00004000003AAD], appliedRebateTypes: [0lcxx00004000005AAA, 0lcxx00004000005AAB]}
    ],
    "limit": 10,
    "offset": 13,
    "appliedRebateTypesLimit": 5,
    "appliedRebateTypesOffset": 9,
    "errors": null
  },
  resultantRebateTypesV2: {
    "isSuccess": true,
    "programRebateTypeIDs": [
      {ReferenceObjectID: "0lcxx00004000002AAA", eligibleRebateTypes: [0lcxx00004000003AAC, 0lcxx00004000003AAD], appliedRebateTypes: [0lcxx00004000005AAA, 0lcxx00004000005AAB]}
    ]
  }
}
```

```

[01cxx0000400003AAA,01cxx0000400003AAB], appliedRebateTypes:
[01cxx0000400004AAA,01cxx0000400004AAB],
{ReferenceObjectID: "01cxx0000400002AAB", eligibleRebateTypes:
[01cxx0000400003AAC,01cxx0000400003AAD], appliedRebateTypes:
[01cxx0000400005AAA,01cxx0000400005AAB] }
],
"limit": 10,
"offset": 13,
"appliedRebateTypesLimit": 5,
"appliedRebateTypesOffset": 9,
"errors":null
}
}

```

## Process Program Rebate Type Products

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

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

This object is available in API version 53.0 and later.

## Supported REST HTTP Methods

### URI

`/services/data/vxx.x/actions/standard/processProgramRebateTypeProducts`

### Formats

JSON

### HTTP Methods

POST

### Authentication

`Authorization: Bearer token`

## Inputs

Input	Details
<code>operationType</code>	<p><b>Type</b> string</p> <p><b>Description</b> Required. The type of operation to be performed on the program rebate type product records. Possible values are:</p> <ul style="list-style-type: none"> <li>• <b>Delete</b>—Deletes all program rebate type products for the specified program rebate type ID.</li> <li>• <b>Insert</b>—Inserts all products as program rebate type products, preserves the existing ones.</li> </ul>

Input	Details
productListViewId	<p><b>Type</b> string</p> <p><b>Description</b> The ID of the product list view containing the products to be added to the inclusion or exclusion list of this program rebate type.</p> <p> <b>Note:</b> This field isn't used when the type of operation is <code>Delete</code>.</p>
programRebateTypeId	<p><b>Type</b> string</p> <p><b>Description</b> Required. The ID of the program rebate type for which the records are being processed.</p>

## Usage

### JSON Sample Request

```
{
  "inputs": [
    {
      "operationType" : "insert",
      "productListViewId": "00BHR00000Q6zqNMAR",
      "programRebateTypeId": "0hvHR000000HDQQIA4"
    }
  ]
}
```

## Process Rebate Batch Calculation Jobs

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

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

## Supported REST HTTP Methods

### URI

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

### Formats

JSON, XML

### HTTP Methods

GET, HEAD, POST

### Authentication

Authorization: Bearer **token**

## Inputs

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

## Outputs

Output	Details
batchJobId	<p><b>Type</b> ID</p> <p><b>Description</b> The ID of the generated batch job record after the request is successful.</p>
accepted	<p><b>Type</b> boolean</p>

Output	Details
<b>Description</b>	
Indicates whether the rebate batch calculation job is accepted.	

## Usage

### Sample Request

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

### Sample Response

```
{
  "errors":null,
  "isSuccess":true,
  "outputValues":{
    "batchJobId":"0ntxx00004000002AAA",
  }
}
```

## Process Rebate CSV Files

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

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

## Supported REST HTTP Methods

### URI

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

### Formats

JSON, XML

### HTTP Methods

GET, HEAD, POST

### Authentication

Authorization: Bearer **token**

## Inputs

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

## Usage

### Sample Request

```
{
  "inputs": [
    {
      "recordId": "0io4S000000TPsyQAG",
      "entityAPIName" : "TransactionJournal"
    }
  ]
}
```

### Sample Response

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

## Upsert Custom Rebate Payout

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

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

## Supported REST HTTP Methods

### URI

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

### Formats

JSON, XML

### HTTP Methods

GET, HEAD, POST

### Authentication

Authorization: Bearer **token**

## Inputs

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

Input	Details
	<p><b>Description</b> Required. The rebate amount for which you want to upsert the rebate payout.</p>
Output	Details

## Outputs

Output	Details
<code>programRebateTypePayoutSourceId</code>	<p><b>Type</b> ID</p> <p><b>Description</b> The ID of the program rebate type payout source record, which is generated after the request is successful.</p>

## Usage

### Sample Request

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

### Sample Response

```
{
  "errors": null,
  "isSuccess": true,
  "outputValues": {
    "programRebateTypePayoutSourceId": "0ntxx00004000002AAA",
  }
}
```

## Rebate Management Metadata API Types

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

### ObjectHierarchyRelationship

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

## ObjectHierarchyRelationship

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

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

### File Suffix and Directory Location

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

### Version

ObjectHierarchyRelationship components are available in API version 51.0 and later.

### Fields

Field Name	Description
childObjectMapping	<p><b>Field Type</b> <a href="#">ObjectMapping</a></p> <p><b>Description</b> Set of <code>inputObject</code>, <code>mappingFields</code>, and <code>outputObject</code> entries.</p>
inputObjRecordsGrpFieldName	<p><b>Field Type</b> string</p> <p><b>Description</b> The field name in the input object used to group the records. This field is available in API version 55.0 and later.</p>
mappingType	<p><b>Field Type</b> <a href="#">ObjHierarchyMappingType</a> (enumeration of type string)</p> <p><b>Description</b> Specifies the type of relationship between two objects. Valid values are:</p> <ul style="list-style-type: none"><li>• <code>ChildToChild</code></li><li>• <code>ParentToChild</code></li><li>• <code>ParentToParent</code></li><li>• <code>Support</code></li></ul> <p>This field is available in API version 55.0 and later.</p>
masterLabel	<p><b>Field Type</b> string</p>

Field Name	Description
outputPntRelationshipFieldName	<b>Description</b> Master label name of the mapping definition.
parentObjectMapping	<b>Field Type</b> string
parentRecord	<b>Description</b> The field name that defines the relationship between a parent and child for the output object. This field is available in API version 55.0 and later.
parentRelationshipFieldName	<b>Field Type</b> ObjectMapping
parentRelationshipFieldName	<b>Description</b> Required.
parentRelationshipFieldName	Set of <code>inputObject</code> , <code>mappingFields</code> , and <code>outputObject</code> entries.
parentRecord	<b>Field Type</b> string
parentRecord	<b>Description</b> The parent record for this object hierarchy relationship. This field is available in API version 55.0 and later.
usageType	<b>Field Type</b> string
usageType	<b>Description</b> Name of the field that defines the relationship between the parent and child.
usageType	<b>Field Type</b> MappingUsageType (enumeration of type string)
usageType	<b>Description</b> Required.
usageType	Name of the usage type of an object hierarchy relationship.
usageType	Valid value is:
	<ul style="list-style-type: none"> <li>• ConvertToSalesAgreement</li> <li>• CLMFieldMapping</li> <li>• EligibleProgramRebateType</li> <li>• MapJournalToMemberAggregate</li> <li>• TransformationMapping</li> </ul>

## ObjectMapping

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

## Fields

Field Name	Description
inputObject	<p><b>Field Type</b> string</p> <p><b>Description</b> Required.</p> <p>Name of the input object type containing the source fields for mapping. For example, Opportunity or OpportunityLineItem.</p> <p> <b>Note:</b> You can also use a custom object as the input object type.</p>
mappingFields	<p><b>Field Type</b> <a href="#">ObjectMappingField</a></p> <p><b>Description</b> Mapping of source object input fields to target object.</p>
outputObject	<p><b>Field Type</b> string</p> <p><b>Description</b> Required.</p> <p>Name of the output object type receiving data conversion. For example, TransactionJournal.</p>

## ObjectMappingField

Represents a set of `inputField` and `outputField` entries.

## Fields

Field Name	Field Type	Description
inputField	string	<p><b>Field Type</b> string</p> <p><b>Description</b> Required.</p> <p>Field in the object specified by the <code>inputObject</code> field in <a href="#">ObjectMapping</a> on page 235. This field is mapped to the field in <code>outputField</code>, which is a field in the object specified by the <code>outputObject</code> field in <a href="#">ObjectMapping</a> on page 235.</p> <p> <b>Note:</b> You can also use custom fields as the input field type.</p>

Field Name	Field Type	Description
outputField	string	<p><b>Field Type</b> string</p> <p><b>Description</b> Required.</p> <p>Field in the object specified by the <code>outputObject</code> field in <a href="#">ObjectMapping</a> on page 235. This field is mapped to the field name in <code>inputField</code>, which is a field in the object specified by the <code>inputObject</code> field in <a href="#">ObjectMapping</a> on page 235.</p> <p> <b>Note:</b> You can also use custom fields as the output field type.</p>

## Declarative Metadata Sample Definition

The following are examples of a ObjectHierarchyRelationship component.

Example of mapping between Opportunity and Transaction Journal.

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

Example of mapping between Quote and Transaction Journal.

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

```

<inputObject>Quote</inputObject>
<outputObject>TransactionJournal</outputObject>
<mappingFields>
  <inputField>AccountId</inputField>
  <outputField>MemberId</outputField>
</mappingFields>
</parentObjectMapping>
<childObjectMapping>
  <inputObject>QuoteLineItem</inputObject>
  <outputObject>TransactionJournal</outputObject>
<mappingFields>
  <inputField>Product2Id</inputField>
  <outputField>ProductId</outputField>
</mappingFields>
<mappingFields>
  <inputField>Quantity</inputField>
  <outputField>Quantity</outputField>
</mappingFields>
</childObjectMapping>
<usageType>EligibleProgramRebateType</usageType>
</ObjectHierarchyRelationship>

```

Example of mapping between Contract and Transaction Journal.

```

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

```

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>ObjectHierarchyRelationship</name>
  </types>
  <version>51.0</version>
</Package>

```

## Usage

Use the `deploy()` call to deploy metadata with a .zip file. Every .zip file contains a project manifest, a file that's named `package.xml`, and a set of directories that contain the components. The manifest file defines the components that you're trying to retrieve or deploy in the .zip file. The manifest also defines the API version that's used for the deployment or retrieval. For more information on the .zip file,

deploying, and retrieving the metadata, see [Deploying and Retrieving Metadata with the Zip File](#). You can also deploy and retrieve the metadata API using Postman.

## Wildcard Support in the Manifest File

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

# Rebate Management Business APIs

---

Rebate Management Business APIs use REST endpoints. These REST APIs follow similar conventions as Connect REST APIs.

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

## Resources

Here's a list of Rebate Management Business API resources.

## Request Bodies

Here's a list of Rebate Management Business API request bodies.

## Response Bodies

Here's a list of Rebate Management Business API response bodies.

## Resources

Here's a list of Rebate Management Business API resources.

### Program Rebate Type Validation (POST)

Validates the setup, configuration, and applicable rules of a specific program rebate type.

## Program Rebate Type Validation (POST)

Validates the setup, configuration, and applicable rules of a specific program rebate type.

### Resource

`/connect/rebates/rebate-configuration-check`

### Resource example

`https://yourInstance.salesforce.com/services/data/v65.0/connect/rebates/rebate-configuration-check`

### Available version

65.0

### HTTP methods

POST

**Request body for POST****JSON example**

```
{
  "programRebateTypeId": "0hvLT0000000GctYAM"
}
```

**Properties**

Name	Type	Description	Required or Optional	Available Version
programRebateTypeId	String	The ID of the program rebate type for which the setup issue is to be validated.	Required.	65.0

**Response body for POST**[Program Rebate Type Validation Response](#)

## Request Bodies

Here's a list of Rebate Management Business API request bodies.

[Program Rebate Type Validation Input](#)

Contains the parameters to initiate the validation of a program rebate type's setup and configuration.

## Program Rebate Type Validation Input

Contains the parameters to initiate the validation of a program rebate type's setup and configuration.

**JSON example**

```
{
  "programRebateTypeId": "0hvLT0000000GctYAM"
}
```

**Properties**

Name	Type	Description	Required or Optional	Available Version
programRebateTypeId	String	The ID of the program rebate type for which the setup issue is to be validated.	Required.	65.0

## Response Bodies

Here's a list of Rebate Management Business API response bodies.

[Program Rebate Type Validation Response](#)

The result of validating a program rebate type. It includes validation status, messages, and any identified configuration issues.

[Program Rebate Type Validation Error Response](#)

Represents error details for program rebate type setup validation.

[Program Rebate Type Validation Results Response](#)

Represents the results details for program rebate type setup validation.

## Program Rebate Type Validation Response

The result of validating a program rebate type. It includes validation status, messages, and any identified configuration issues.

### JSON example

```
{
  "isSuccess": true,
  "errors": [],
  "isValid": false,
  "results": ["{ResourceName} defined in eligibility criteria is not available in the data sources in DPE definition : {DPE definition name}"]
}
```

### Properties

Property Name	Type	Description	Filter Group and Version	Available Version
errors	<a href="#">Program Rebate Type Validation Error Response</a> []	Collection of errors found during validation.	Big, 65.0	65.0
isSuccess	Boolean	Indicates whether the program rebate type validation was successful.	Big, 65.0	65.0
isValid	Boolean	Indicates the status of the program rebate type setup based on validation rules.	Big, 65.0	65.0
results	<a href="#">Program Rebate Type Validation Results Response</a> []	Collection of setup-related validation errors.	Big, 65.0	65.0

## Program Rebate Type Validation Error Response

Represents error details for program rebate type setup validation.

### JSON example

```
{
  "errors": [
    {
      "errorCode": "INVALID_API_INPUT",
      "errorMessage": "Please provide a valid program rebate type id."
    }
  ]
}
```

## Properties

Property Name	Type	Description	Filter Group and Version	Available Version
errorCode	String	The code of the error due to which the request failed.	Big, 65.0	65.0
errorMessage	String	The error message that provides the reason the request failed.	Big, 65.0	65.0

## Program Rebate Type Validation Results Response

Represents the results details for program rebate type setup validation.

### JSON example

```
{
  "results": [
    {
      "setupWarningDescription": "The payout period isn't entirely within the effective dates of the Program Rebate Type Benefit. Update the effective dates and try again.",
      "setupWarningResults": [
        "Tier 1: April FY 2025"
      ],
      "setupWarningType": "BENEFIT_PAYOUT_PERIOD_MISMATCH"
    }
  ]
}
```

## Properties

Property Name	Type	Description	Filter Group and Version	Available Version
setupWarningDescription	String	A description of the identified setup issue.	Big, 65.0	65.0
setupWarningResults	String[]	The records or configurations impacted by the setup issue.	Big, 65.0	65.0
setupWarningType	String	The type of configuration or data-related issue identified in the setup.	Big, 65.0	65.0

# Data Processing Engine, Batch Management, and Monitor Workflow Services

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

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

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

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

## [Data Model](#)

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

## [Common Tooling API Object](#)

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

## [Common Platform Event](#)

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

## [Common Business APIs](#)

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

## [Data Processing Engine](#)

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

## [Batch Management](#)

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

## [Monitor Workflow Services](#)

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

## EDITIONS

Available in: Lightning Experience

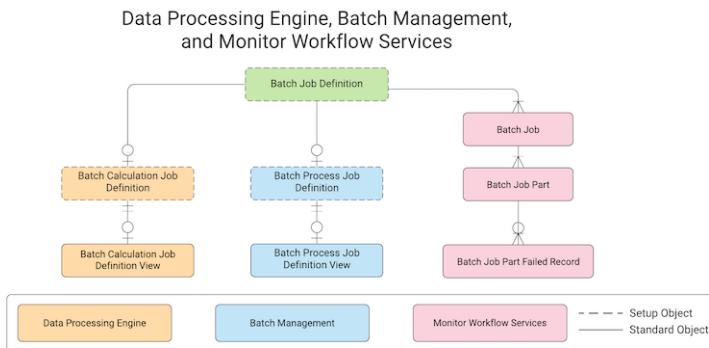
Available in: Data Processing Engine is available with Enterprise, Unlimited, and Performance Editions with the Financial Services Cloud, Loyalty Management, Manufacturing Cloud, Rebate Management, Accounting Subledger, or Provider Search in Health Cloud.

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

## Data Model

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

Here's the data model:



## EDITIONS

Available in: Lightning Experience

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

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

## Common Tooling API Object

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

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

### BatchJobDefinition

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

## BatchJobDefinition

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

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

### Supported SOAP API Calls

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

### Supported REST API Methods

`GET, HEAD, Query`

### Fields

Field	Details
Description	<p><b>Type</b> textarea</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The description of the batch job definition.</p>
DeveloperName	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> The developer name of the batch job.</p>
Language	<p><b>Type</b> picklist</p>

### EDITIONS

Available in: Lightning Experience

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

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

Field	Details
	<p><b>Properties</b> Filter, Group, Restricted picklist, Sort</p>
	<p><b>Description</b> The language in which the batch job is created. Possible values are:</p> <ul style="list-style-type: none"><li>af—Afrikaans</li><li>am—Amharic</li><li>ar—Arabic</li><li>ar_AE—Arabic (United Arab Emirates)</li><li>ar_BH—Arabic (Bahrain)</li><li>ar_DZ—Arabic (Algeria)</li><li>ar_EG—Arabic (Egypt)</li><li>ar_IQ—Arabic (Iraq)</li><li>ar_JO—Arabic (Jordan)</li><li>ar_KW—Arabic (Kuwait)</li><li>ar_LB—Arabic (Lebanon)</li><li>ar LY—Arabic (Libya)</li><li>ar_MA—Arabic (Morocco)</li><li>ar_OM—Arabic (Oman)</li><li>ar_QA—Arabic (Qatar)</li><li>ar_SA—Arabic (Saudi Arabia)</li><li>ar_SD—Arabic (Sudan)</li><li>ar_SY—Arabic (Syria)</li><li>ar_TN—Arabic (Tunisia)</li><li>ar_YE—Arabic (Yemen)</li><li>bg—Bulgarian</li><li>bn—Bengali</li><li>bs—Bosnian</li><li>ca—Catalan</li><li>cs—Czech</li><li>cy—Welsh</li><li>da—Danish</li><li>de—German</li><li>de_AT—German (Austria)</li><li>de_BE—German (Belgium)</li><li>de_CH—German (Switzerland)</li><li>de LU—German (Luxembourg)</li><li>el—Greek</li></ul>

Field	Details
	<ul style="list-style-type: none"><li>• en_AU—English (Australian)</li><li>• en_CA—English (Canadian)</li><li>• en_GB—English (UK)</li><li>• en_HK—English (Hong Kong)</li><li>• en_IE—English (Ireland)</li><li>• en_IN—English (Indian)</li><li>• en_MY—English (Malaysian)</li><li>• en_NZ—English (New Zealand)</li><li>• en_PH—English (Phillipines)</li><li>• en_SG—English (Singapore)</li><li>• en_US—English</li><li>• en_ZA—English (South Africa)</li><li>• eo—Esperanto (Pseudo)</li><li>• es—Spanish</li><li>• es_AR—Spanish (Argentina)</li><li>• es_BO—Spanish (Bolivia)</li><li>• es_CL—Spanish (Chile)</li><li>• es_CO—Spanish (Colombia)</li><li>• es_CR—Spanish (Costa Rica)</li><li>• es_DO—Spanish (Dominican Republic)</li><li>• es_EC—Spanish (Ecuador)</li><li>• es_GT—Spanish (Guatemala)</li><li>• es_HN—Spanish (Honduras)</li><li>• es_MX—Spanish (Mexico)</li><li>• es_NI—Spanish (Nicaragua)</li><li>• es_PA—Spanish (Panama)</li><li>• es_PE—Spanish (Peru)</li><li>• es_PR—Spanish (Puerto Rico)</li><li>• es_PY—Spanish (Paraguay)</li><li>• es_SV—Spanish (El Salvador)</li><li>• es_US—Spanish (United States)</li><li>• es_UY—Spanish (Uruguay)</li><li>• es_VE—Spanish (Venezuela)</li><li>• et—Estonian</li><li>• eu—Basque</li><li>• fa—Farsi</li><li>• fi—Finnish</li><li>• fr—French</li></ul>

Field	Details
	<ul style="list-style-type: none"><li>• <code>fr_BE</code>—French (Belgium)</li><li>• <code>fr_CA</code>—French (Canadian)</li><li>• <code>fr_CH</code>—French (Switzerland)</li><li>• <code>fr_LU</code>—French (Luxembourg)</li><li>• <code>ga</code>—Irish</li><li>• <code>gu</code>—Gujarati</li><li>• <code>hi</code>—Hindi</li><li>• <code>hr</code>—Croatian</li><li>• <code>hu</code>—Hungarian</li><li>• <code>hy</code>—Armenian</li><li>• <code>in</code>—Indonesian</li><li>• <code>is</code>—Icelandic</li><li>• <code>it</code>—Italian</li><li>• <code>it_CH</code>—Italian (Switzerland)</li><li>• <code>iw</code>—Hebrew</li><li>• <code>iw_ESO</code>—Esperanto RTL (Pseudo)</li><li>• <code>ja</code>—Japanese</li><li>• <code>ka</code>—Georgian</li><li>• <code>km</code>—Khmer</li><li>• <code>kn</code>—Kannada</li><li>• <code>ko</code>—Korean</li><li>• <code>lb</code>—Luxembourgish</li><li>• <code>lt</code>—Lithuanian</li><li>• <code>lv</code>—Latvian</li><li>• <code>mi</code>—Te reo</li><li>• <code>mk</code>—Macedonian</li><li>• <code>ml</code>—Malayalam</li><li>• <code>mr</code>—Marathi</li><li>• <code>ms</code>—Malay</li><li>• <code>mt</code>—Maltese</li><li>• <code>my</code>—Burmese</li><li>• <code>nl_BE</code>—Dutch (Belgium)</li><li>• <code>nl_NL</code>—Dutch</li><li>• <code>no</code>—Norwegian</li><li>• <code>pl</code>—Polish</li><li>• <code>pt_BR</code>—Portuguese (Brazil)</li><li>• <code>pt_PT</code>—Portuguese (European)</li><li>• <code>rm</code>—Romansh</li></ul>

Field	Details
	<ul style="list-style-type: none"> <li>• <code>ro</code>—Romanian</li> <li>• <code>ro_MD</code>—Romanian (Moldova)</li> <li>• <code>ru</code>—Russian</li> <li>• <code>sh</code>—Serbian (Latin)</li> <li>• <code>sh_ME</code>—Montenegrin</li> <li>• <code>sk</code>—Slovak</li> <li>• <code>sl</code>—Slovene</li> <li>• <code>sq</code>—Albanian</li> <li>• <code>sr</code>—Serbian (Cyrillic)</li> <li>• <code>sv</code>—Swedish</li> <li>• <code>sw</code>—Swahili</li> <li>• <code>ta</code>—Tamil</li> <li>• <code>te</code>—Telugu</li> <li>• <code>th</code>—Thai</li> <li>• <code>tl</code>—Tagalog</li> <li>• <code>tr</code>—Turkish</li> <li>• <code>uk</code>—Ukrainian</li> <li>• <code>ur</code>—Urdu</li> <li>• <code>vi</code>—Vietnamese</li> <li>• <code>xh</code>—Xhosa</li> <li>• <code>zh_CN</code>—Chinese (Simplified)</li> <li>• <code>zh_HK</code>—Chinese (Hong Kong)</li> <li>• <code>zh_SG</code>—Chinese (Singapore)</li> <li>• <code>zh_TW</code>—Chinese (Traditional)</li> <li>• <code>zu</code>—Zulu</li> </ul>
<code>MasterLabel</code>	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> The label of the batch job.</p>
<code>ProcessGroup</code>	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p>

Field	Details
	<p><b>Description</b> The group or team that's using the batch job. This field is only applicable to Batch Management jobs.</p>
Status	<p><b>Type</b> picklist</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Restricted picklist, Sort</p> <p><b>Description</b> The status of the batch job.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• Active</li> <li>• Inactive</li> </ul>
Type	<p><b>Type</b> picklist</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Restricted picklist, Sort</p> <p><b>Description</b> Specifies the type of batch job.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• Calc—Data Processing Engine</li> <li>• Flow</li> <li>• BulkUpdate</li> <li>• ConsumptionOveragesCalculation</li> <li>• DecisionTableRefresh</li> <li>• DeepCloneSalesAgreement</li> <li>• EntitlementCreationBatchJob</li> <li>• HighScaleBreProcess</li> <li>• IndustriesLSCommercial</li> <li>• LoyaltyProgramProcess</li> <li>• ManagerProvisioning</li> <li>• NetUnitRateCalculation</li> <li>• PbbToOptyConversion</li> <li>• ProductCatalogCacheRefresh</li> <li>• RatableSummaryCreation</li> <li>• SummaryCreation</li> </ul>

Field	Details
	When Data Processing Engine or Batch Management is available in a Salesforce org, the default values are <i>Calc</i> or <i>Flow</i> respectively. Other types may be available to you depending on the licenses available in your org.

## Common Platform Event

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

### EDITIONS

Available in: Lightning Experience

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

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

### BatchJobStatusChangedEvent

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

### BatchJobStatusChangedEvent

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

### Supported Calls

`describeSObjects()`

### Supported Subscribers

Subscriber	Supported?
Flows	✓

### Fields

Field	Details
BatchJob	<p><b>Type</b> string</p> <p><b>Description</b> The unique identifier of the batch job.</p>
BatchJobDefinition	<p><b>Type</b> string</p> <p><b>Properties</b> Nillable</p>

Field	Details
	<b>Description</b>
	The unique identifier of the batch job's definition.
EndDateTime	<b>Type</b>
	dateTime
	<b>Properties</b>
	Nillable
	<b>Description</b>
	The timestamp for when the batch job execution is complete.
EventUuid	<b>Type</b>
	string
	<b>Properties</b>
	Nillable
	<b>Description</b>
	A universally unique identifier (UUID) that identifies a platform event message. This field is available in API version 52.0 and later.
ReplayId	<b>Type</b>
	string
	<b>Properties</b>
	Nillable
	<b>Description</b>
	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.
StartTime	<b>Type</b>
	dateTime
	<b>Properties</b>
	Nillable
	<b>Description</b>
	The timestamp for when the batch job execution is started.
Status	<b>Type</b>
	picklist
	<b>Properties</b>
	Restricted picklist
	<b>Description</b>
	The status of the batch job.
	Possible values are:

Field	Details
	<ul style="list-style-type: none"><li>• Canceled—Canceled</li><li>• Failure</li><li>• Success</li></ul>

## Common Business APIs

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

### [REST Reference](#)

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

## REST Reference

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

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

### [Resources](#)

Here's a list of Common Business API resources.

### [Response Bodies](#)

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

### SEE ALSO:

[Connect REST API Developer Guide](#)

## Resources

Here's a list of Common Business API resources.

### [Batch Job Cancel](#)

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

## Batch Job Cancel

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

### Special Access Rules

To use this resource, the following permissions are required:

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

**Resource**

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

**Resource example**

```
/connect/batch-job/0mdxx00000000fxAAA/cancel-job
```

**Available version**

52.0

**Requires Chatter**

No

**HTTP methods**

POST

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

**Response body for POST**

Returns HTTP 201 on success.

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

**Response Bodies**

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

[Batch Job Cancel Output](#)

Output representation of the batch job cancel request.

[Batch Job Cancel Output](#)

Output representation of the batch job cancel request.

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

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

HTTP Response Code	Error Code	Description
400	INVALID_STATUS	We can't cancel the batch job that doesn't have an active run. Specify the ID of a batch job with an active run and try again.
400	INVALID_STATUS	We can't cancel the batch job that is already canceled or completed. Specify the ID of a valid batch job with the status InProgress or Submitted and try again.

HTTP Response Code	Error Code	Description
400	DELETE_FAILED	We can't cancel the batch job of which the results are already being written back.
400	DELETE_FAILED	We can't cancel the batch job because of an error in processing your org's data. Run the Data Processing Engine definition and try again.
403	FORBIDDEN	You don't have the permission to cancel a batch job. Ask your Salesforce admin for help.
404	RESOURCE_NOT_FOUND	Specify the ID of a valid batch job and try again.
500	INTERNAL_SERVER_ERROR	Something went wrong when we tried to cancel the batch job. Try again or ask your Salesforce admin for help.

## Data Processing Engine

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

### EDITIONS

Available in: Lightning Experience

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

#### [Data Processing Engine Tooling API Objects](#)

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

#### [Data Processing Engine Standard Object](#)

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

#### [Data Processing Engine Metadata API](#)

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

#### [Data Processing Engine Invocable Actions](#)

Run an active Data Processing Engine definition. For more information on custom invocable actions, see [REST API Developer Guide](#) and [Actions Developer Guide](#).

## Data Processing Engine Tooling API Objects

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

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

### [BatchCalcJobDefinition](#)

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

### BatchCalcJobDefinition

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

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

### Supported SOAP API Calls

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

### Supported REST API Methods

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

### Fields

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

### EDITIONS

Available in: Lightning Experience

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

Field	Details
	<p><b>Properties</b> Filter, Group, Nillable, Sort</p>
	<p><b>Description</b> The Data Space API name from Data Cloud.</p>
DefinitionRunMode	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The execution mode of the Data Processing Engine definition. Possible values are:<ul style="list-style-type: none"><li>• <code>Batch</code></li><li>• <code>OnDemand</code>—This value is reserved for internal use.</li></ul>The default value is <code>Batch</code>.</p>
DeveloperName	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> The developer name of the Data Processing Engine definition.</p>
DoesGenAllFailedRecords	<p><b>Type</b> boolean</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Sort</p> <p><b>Description</b> Indicates whether the error file includes a complete list of all failed writeback records (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>, and only the first instance of a failure is recorded in the error file. If set to <code>true</code>, all failed records are recorded in the error file for the writeback node. Available in API version 65.0 and later.</p>
ExecutionPlatformObjectType	<p><b>Type</b> Picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Required. The execution platform object type that's used during the read, transform, and writeback process for the Data Processing Engine definition. Possible values are:</p>

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

Field	Details
ManageableState	<p><b>Type</b> ManageableState enumerated list</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Indicates the manageable state of the specified component that is contained in a package:</p> <ul style="list-style-type: none"> <li>• beta</li> <li>• deleted</li> <li>• deprecated</li> <li>• deprecatedEditable</li> <li>• installed</li> <li>• installedEditable</li> <li>• released</li> <li>• unmanaged</li> </ul>
MasterLabel	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> The label of the Data Processing Engine definition.</p>
Metadata	<p><b>Type</b> complexvalue</p> <p><b>Properties</b> Create, Nillable, Update</p> <p><b>Description</b> Data Processing Engine definition's metadata. Query this field only if the query result contains no more than one record. Otherwise, an error is returned. If more than one record exists, use multiple queries to retrieve the records. This limit protects performance.</p>
NamespacePrefix	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> 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 <b><i>namespacePrefix__componentName</i></b> notation.</p>

Field	Details
	<p>The namespace prefix can have one of the following values:</p> <ul style="list-style-type: none"> <li>• 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.</li> <li>• In organizations that aren't Developer Edition organizations, <code>NamespacePrefix</code> is only set for objects that are part of an installed managed package. There's no namespace prefix for all other objects.</li> </ul>
ProcessType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Restricted picklist, Sort</p> <p><b>Description</b> Required. The process type for which the Data Processing Engine definition is created.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>AccountingPeriodClosure</code>—Legal Entity Accounting Period Closure—Available in API version 62.0 and later.</li> <li>• <code>ActionableList</code></li> <li>• <code>AdvancedAccountForecast</code></li> <li>• <code>BenefitManagement</code>—Available in API version 61.0 and later.</li> <li>• <code>BillingSchedulesforInvoiceGeneration</code>—Billing Schedules for Invoice Generation—Available in API version 62.0 and later.</li> <li>• <code>CDPEnrichment</code></li> <li>• <code>ChannelInventoryManagement</code>—Available in API version 63.0 and later.</li> <li>• <code>CollectionsAndRecovery</code></li> <li>• <code>CriteriaBsdSearchAndFilter</code> – Criteria-Based Search And Filter</li> <li>• <code>DataProcessingEngine</code> – Standard</li> <li>• <code>DecisionMatrixDataUpload</code>—This value is available only if you have Business Rules Engine enabled.</li> <li>• <code>Decisiontable</code>—Decision table activation—Available in API version 62.0 and later.</li> <li>• <code>Education</code></li> <li>• <code>EmployeeService</code>—Available in API version 63.0 and later.</li> <li>• <code>FinancialSummaryRollup</code>—Available in API version 63.0 and later.</li> <li>• <code>ForeignExchangeGainLossCalculations</code></li> <li>• <code>FSCHierarchyRollUp</code></li> <li>• <code>Fundraising</code></li> <li>• <code>FundraisingRollups</code>—Available in API version 63.0 and later.</li> </ul>

Field	Details
	<ul style="list-style-type: none"><li>• GeneralLedgerAccountBalancesSummary</li><li>• InventoryBatchSearch</li><li>• InventorySearch</li><li>• InvoiceGeneration—Available in API version 62.0 and later.</li><li>• LegalEntityAccountingPeriodClosureAdvanced—Available in API version 63.0 and later.</li><li>• LifeSciencesCommercialTerritoryAlignment—Available in API version 63.0 and later.</li><li>• LifeSciencesCustomerEngagement</li><li>• Loyalty</li><li>• LoyaltyPartnerManagement</li><li>• LoyaltyPointsAggregation</li><li>• NetZero</li><li>• NextGenForecasting—Available in API version 62.0 and later.</li><li>• PatientServicesProgram</li><li>• PnmRosterFileUpload—Available in API version 62.0 and later.</li><li>• PriceProtection—Available in API version 62.0 and later.</li><li>• ProductCatalogManagement—Available in API version 63.0 and later.</li><li>• ProgramBasedBusiness</li><li>• ProgramManagementRollups</li><li>• Rebates</li><li>• RecordAggregation</li><li>• RevenueTransactionManagement—Available in API version 63.0 and later.</li><li>• AccountingSubledger—This value is reserved for internal use.</li><li>• ProviderSearch—This value is reserved for internal use.</li><li>• Recruitment—Available in API version 62.0 and later.</li><li>• SalesAgreement—Available in API version 63.0 and later.</li><li>• StockRotation</li><li>• UsageManagement—Available in API version 62.0 and later.</li></ul> <p>When Data Processing Engine is enabled for a Salesforce org, the default value is 'Standard'. Other process types may be available to you depending on the licenses available in your org.</p>

## Data Processing Engine Standard Object

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

### `BatchCalcJobDefinitionView`

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

### `BatchCalcJobDefinitionView`

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



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

### Supported Calls

`describeSObjects()`, `query()`

### Fields

Field	Details
<code>DataSpaceApiName</code>	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> Stores the data space API name from Data Cloud.</p>
<code>DefinitionRunMode</code>	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> The execution mode of the Data Processing Engine definition. Possible values are:           <ul style="list-style-type: none"> <li>Batch</li> <li>OnDemand—On Demand</li> </ul>           The default value is <code>Batch</code>.         </p>

### EDITIONS

Available in: Lightning Experience

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

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

Field	Details
InstalledPackageName	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The name of the package used to add the definition to the org.</p>
IsActive	<p><b>Type</b> boolean</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Sort</p> <p><b>Description</b> Indicates whether the definition is active.</p>
IsTemplate	<p><b>Type</b> boolean</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Sort</p> <p><b>Description</b> Indicates whether the definition is a template. You can make a copy of a template definition and update it based on your requirements.</p>
LastModifiedBy	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The unique identifier of the user who modified the definition last.</p>
ManageableState	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Indicates the manageable state of the definition if it's contained in a package. Possible values are:</p> <ul style="list-style-type: none"> <li>• beta—Managed-Beta</li> <li>• deleted—Managed-Proposed-Deleted</li> <li>• deprecated—Managed-Proposed-Deprecated</li> <li>• deprecatedEditable—SecondGen-Installed-Deprecated</li> <li>• installed—Managed-Installed</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>• <code>installedEditable</code>—SecondGen-Installed-Editable</li> <li>• <code>released</code>—Managed-Released</li> <li>• <code>unmanaged</code>—Unmanaged</li> </ul>
MasterLabel	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The label of the Data Processing Engine definition.</p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The name of the Data Processing Engine definition.</p>
NamespacePrefix	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> 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 <code>namespacePrefix__componentName</code> notation.</p> <p>The namespace prefix can have one of the following values:</p> <ul style="list-style-type: none"> <li>• 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.</li> <li>• In organizations that aren't Developer Edition organizations, NamespacePrefix is only set for objects that are part of an installed managed package. There's no namespace prefix for all other objects.</li> </ul>
ProcessType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p>

Field	Details
	<p><b>Description</b></p> <p>The process type of the definition.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• AccountingPeriodClosure—Legal Entity Accounting Period Closure—Available in API version 62.0 and later.</li> <li>• ActionableList</li> <li>• AdvancedAccountForecast</li> <li>• BenefitManagement—Available in API version 61.0 and later.</li> <li>• BillingSchedulesforInvoiceGeneration—Billing Schedules for Invoice Generation—Available in API version 62.0 and later.</li> <li>• CDPEnrichment</li> <li>• ChannelInventoryManagement—Available in API version 63.0 and later.</li> <li>• CollectionsAndRecovery</li> <li>• CriteriaBsdSearchAndFilter - Criteria-Based Search And Filter</li> <li>• DataProcessingEngine - Standard</li> <li>• DecisionMatrixDataUpload-This value is available only if you have Business Rules Engine enabled.</li> <li>• Decisiontable—Decision table activation—Available in API version 62.0 and later.</li> <li>• Education</li> <li>• EmployeeService—Available in API version 63.0 and later.</li> <li>• FinancialSummaryRollup—Available in API version 63.0 and later.</li> <li>• ForeignExchangeGainLossCalculations</li> <li>• FSCHierarchyRollUp</li> <li>• Fundraising</li> <li>• FundraisingRollups—Available in API version 63.0 and later.</li> <li>• GeneralLedgerAccountBalancesSummary</li> <li>• InventoryBatchSearch</li> <li>• InventorySearch</li> <li>• InvoiceGeneration—Available in API version 62.0 and later.</li> <li>• LegalEntityAccountingPeriodClosureAdvanced—Available in API version 63.0 and later.</li> <li>• LifeSciencesCommercialTerritoryAlignment—Available in API version 63.0 and later.</li> <li>• LifeSciencesCustomerEngagement</li> <li>• Loyalty</li> <li>• LoyaltyPartnerManagement</li> <li>• LoyaltyPointsAggregation</li> <li>• NetZero</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>• <code>NextGenForecasting</code>—Available in API version 62.0 and later.</li> <li>• <code>PatientServicesProgram</code></li> <li>• <code>PnmRosterFileUpload</code>—Available in API version 62.0 and later.</li> <li>• <code>PriceProtection</code>—Available in API version 62.0 and later.</li> <li>• <code>ProductCatalogManagement</code>—Available in API version 63.0 and later.</li> <li>• <code>ProgramBasedBusiness</code></li> <li>• <code>ProgramManagementRollups</code></li> <li>• <code>Rebates</code></li> <li>• <code>RecordAggregation</code></li> <li>• <code>RevenueTransactionManagement</code>—Available in API version 63.0 and later.</li> <li>• <code>AccountingSubledger</code>—This value is reserved for internal use.</li> <li>• <code>ProviderSearch</code>—This value is reserved for internal use.</li> <li>• <code>Recruitment</code>—Available in API version 62.0 and later.</li> <li>• <code>SalesAgreement</code>—Available in API version 63.0 and later.</li> <li>• <code>StockRotation</code></li> <li>• <code>UsageManagement</code>—Available in API version 62.0 and later.</li> </ul> <p>When Data Processing Engine is enabled for a Salesforce org, the default value is 'Standard'. Other process types may be available to you depending on your industry solution and permission sets.</p>

## Data Processing Engine Metadata API

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

### EDITIONS

#### [BatchCalcJobDefinition](#)

Represents a Data Processing Engine definition.

Available in: Lightning Experience

#### **BatchCalcJobDefinition**

Represents a Data Processing Engine definition.

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

#### **Parent Type**

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

#### **File Suffix and Directory Location**

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

## Version

BatchCalcJobDefinition components are available in API version 51.0 and later.

## Special Access Rules

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

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

## Fields

Field Name	Field Type	Description
aggregates	<a href="#">BatchCalcJobAggregate[]</a>	Collection of aggregate nodes in a data processing engine.
appends	<a href="#">BatchCalcJobUnion[]</a>	Collection of append nodes in a data processing engine.
atomicWritebacks	<a href="#">BatchCalcAtomicWriteBack[]</a>	Collection of composite writeback nodes in a data processing engine definition. Available in API version 62.0 and later.
customNodes	<a href="#">BatchCalcCustomNode[]</a>	Collection of custom nodes in a data processing engine. Available in API version 57.0 and later.
dataSpaceApiName	string	Stores the Data Space API Name from . Available in API version 60.0 and later.
datasources	<a href="#">BatchCalcJobDatasource[]</a>	Collection of data source nodes in a data processing engine.
definitionRunMode	<a href="#">BatchDefinitionRunMode</a> (of type string)	Specifies the execution mode in a data processing engine. Valid values are: <ul style="list-style-type: none"> <li>• Batch</li> <li>• OnDemand</li> </ul>
description	string	Description of a data processing engine definition.
doesGenAllFailedRecords	boolean	Indicates whether the error file includes a complete list of all failed writeback records ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> , and only the first instance of a failure is recorded in the error file. If set to <code>true</code> , all failed records are recorded in the error file for the writeback node. <p>Available in API version 65.0 and later.</p>

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

Field Name	Field Type	Description
		<ul style="list-style-type: none"><li>● <code>CollectionPlan</code>—Available in API version 65.0 and later.</li><li>● <code>CriteriaBsdSearchAndFilter</code></li><li>● <code>DataProcessingEngine</code></li><li>● <code>DecisionMatrixDataUpload</code></li><li>● <code>Decisiontable</code></li><li>● <code>Education</code></li><li>● <code>EmployeeService</code>—Available in API version 63.0 and later.</li><li>● <code>FinancialSummaryRollup</code></li><li>● <code>ForeignExchangeGainLossCalculations</code>—Available in API version 65.0 and later.</li><li>● <code>FSCHierarchyRollUp</code></li><li>● <code>Fundraising</code>—Available in API version 64.0 and later.</li><li>● <code>FundraisingRollups</code>—Available in API version 63.0 and later.</li><li>● <code>GeneralLedgerAccountBalancesSummary</code>—Available in API version 65.0 and later.</li><li>● <code>InventoryBatchSearch</code>—Available in API version 65.0 and later.</li><li>● <code>InventorySearch</code>—Available in API version 65.0 and later.</li><li>● <code>InvoiceGeneration</code></li><li>● <code>Loyalty</code></li><li>● <code>LegalEntityAccountingPeriodClosureAdvanced</code>—Available in API version 63.0 and later.</li><li>● <code>LifeSciencbatchcalesCommercialTerritoryAlignment</code>—Available in API version 63.0 and later.</li><li>● <code>LifeSciencesCustomerEngagement</code>—Available in API version 64.0 and later.</li><li>● <code>LoyaltyPartnerManagement</code></li><li>● <code>LoyaltyPointsAggregation</code></li><li>● <code>NextGenForecasting</code>—Available in API version 64.0 and earlier.</li><li>● <code>NetZero</code></li><li>● <code>PatientServicesProgram</code>—Available in API version 64.0 and later.</li><li>● <code>PnmRosterFileUpload</code></li><li>● <code>PriceProtection</code></li><li>● <code>ProductCatalogManagement</code></li><li>● <code>ProgramBasedBusiness</code></li><li>● <code>ProviderSearch</code>—This value is reserved for internal use.</li><li>● <code>Rebates</code></li><li>● <code>Recruitment</code></li></ul>

Field Name	Field Type	Description
		<ul style="list-style-type: none"> <li>RevenueTransactionManagement—Available in API version 63.0 and later.</li> <li>SalesAgreement—Available in API version 63.0 and later.</li> <li>TestAtomicWritebackScale—Available in API version 64.0 and later.</li> <li>TestProcessType</li> <li>UsageManagement</li> </ul>
status	BatchJobDefinition Status (enumeration of type string)	Status of a data processing engine definition. Valid values are: <ul style="list-style-type: none"> <li>Active</li> <li>Inactive</li> </ul>
transforms	<a href="#">BatchCalcJobTransform</a> []	Collection of data transformation nodes in a data processing engine.
writebacks	<a href="#">BatchCalcJobWriteback Object</a> []	Collection of writeback objects in which the results of the data processing engine are written back.

## BatchCalcJobAggregate

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

### Fields

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

## BatchCalcJobAggregateField

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

## Fields

Field Name	Field Type	Description
aggregateFunction	<a href="#">BatchCalcAggregateFunction</a> (enumeration of type string)	<p>Required. Function used for aggregation. Valid values are:</p> <ul style="list-style-type: none"> <li>• Unique—A count of unique values.</li> <li>• Sum—The sum of all values.</li> <li>• Max—The largest value.</li> <li>• Min—The smallest value.</li> <li>• Avg—The average value, calculated as the mean.</li> <li>• Std—The standard deviation.</li> <li>• StdP—A standard deviation with population variance.</li> <li>• Var—The variance.</li> <li>• VarP—The variance with population.</li> <li>• Count—The total count of values.</li> </ul>
alias	string	Required. Name that subsequent nodes within the data processing engine use to refer to the aggregate field.
sourceFieldName	string	Required. Source node field on which the aggregate is calculated.

## BatchCalcJobAtomicWriteback

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

Field Name	Field Type	Description
description	string	Description of the composite writeback object.
label	string	Required. Name of the composite writeback object.
name	string	Required. API name of the composite writeback object.
writebackObjectRelationships	<a href="#">BatchCalcJobAtomicWritebackRelationship</a>	Specifies the relationship between the writeback objects that are involved in the writeback operation.
writebackSequence	int	Sequence in which the data processing engine executes the composite writeback node.

## BatchCalcJobAtomicWritebackRelationship

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

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

## BatchCalcJobCustomNode

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

### Fields

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

## BatchCalcJobCustomNodeParameter

Represents the field mappings of an extension node.

### Fields

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

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

## BatchCalcJobDatasource

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

### Fields

Field Name	Field Type	Description
CSVDelimiter	BatchCalcJobCSVDelimiter (enumeration of type string)	<p>Specifies the field separator to read fields from a CSV file record.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• COMMA</li> <li>• BACKQUOTE</li> <li>• CARET</li> <li>• PIPE</li> <li>• SEMICOLON</li> <li>• TAB</li> </ul> <p>The default value is COMMA.</p> <p>The same delimiter value used for the CSV file can't be used within any of the column values in the file. If you mistakenly use the same delimiter value in column values, it can cause data parsing issues.</p>
description	string	Description of a data source node.
fields	BatchCalcJobDatasourceField[]	Required. Collection of data source fields.
fileIdentifier	string	Specifies the source of the file or file storage system.
filePath	string	The file path for the specified file.
fileSource	BatchCalcJobFileSource (enumeration of type string)	<p>Specifies the source of the file or file storage system.</p> <p>Possible value is:</p> <ul style="list-style-type: none"> <li>• ContentManagement</li> </ul>
label	string	Required. Label of a data source node.
name	string	Required. Name of a data source node.
sourceName	string	Required. Name of a standard or custom object from which the data source node extracts data.
type	BatchCalcJobDataSourceType (enumeration of type string)	Required. Type of object for the source object field. Supported values are: <ul style="list-style-type: none"> <li>• Analytics</li> <li>• CalculatedInsightsObject</li> </ul>

Field Name	Field Type	Description
		<ul style="list-style-type: none"> <li>• CRMObject</li> <li>• CSV</li> <li>• DataModelObject</li> <li>• StandardObject</li> </ul>

### BatchCalcJobDatasourceField

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

#### Fields

Field Name	Field Type	Description
alias	string	Name that subsequent nodes within the data processing engine use to refer to the data source field. Required when the field name is lookup.
dataType	BatchCalcJobDataType (enumeration of type string)	<p>Specifies the data type of the input field when using a CSV file as a data source. Possible values are:</p> <ul style="list-style-type: none"> <li>• Boolean—Available in API version 65.0 and later.</li> <li>• Date</li> <li>• DateTime</li> <li>• MultiValue</li> <li>• Numeric</li> <li>• Text</li> </ul>
isPrimaryKey	boolean	Indicates whether a column name is the primary key ( <code>true</code> ) or not ( <code>false</code> ) for the Data Cloud CSV file.
name	string	<p>Required. Name of the field. Can be either of the following:</p> <ul style="list-style-type: none"> <li>• Name of the source field selected in the associated data source object.</li> <li>• Name from a nested lookup object with three child levels.</li> </ul>

### BatchCalcJobFilter

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

#### Fields

Field Name	Field Type	Description
criteria	BatchCalcJobFilter Criteria[]	<p>Collection of filter criteria in a filter node. The field is required when <code>isDynamicFilter</code> is set to <code>False</code>.</p>

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

## BatchCalcJobForecast

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

### Fields

Field Name	Field Type	Description
<code>accuracy</code>	BatchCalcJobFrcstAccuracy (enumeration of type string)	The interval percentage to account for errors in forecasts. Possible values are: <ul style="list-style-type: none"><li>• <code>Eighty</code></li><li>• <code>NinetyFive</code></li><li>• <code>None</code></li></ul> The default value is <code>None</code> .
<code>aggrFlds</code>	<a href="#">BatchCalcJobFrcstAggrFld[]</a>	The list of fields to forecast.
<code>dateField</code>	string	Required. The date field from the source node used to forecast values for the specified forecast length.
<code>description</code>	string	The description of the forecast node.

Field Name	Field Type	Description
<code>forecastModel</code>	BatchCalcJobFrcstModel (enumeration of type string)	<p>The model used to forecast data.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• Additive</li> <li>• Auto</li> <li>• Multiplicative</li> </ul> <p>The default value is Auto.</p>
<code>forecastCount</code>	int	<p>The number of time periods to generate forecast data. For example, if you select Year-Month as the forecast period type, and 4 as the forecast period count, the forecast results are generated for the next 4 months.</p> <p>The minimum and the default count is 1, and the maximum is 100.</p>
<code>forecastPeriod</code>	BatchCalcJobFrcstPeriodType (enumeration of type string)	<p>Required.</p> <p>The type of forecast period to group date field values in the forecast results.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• FiscalYear</li> <li>• FiscalYearMonth</li> <li>• FiscalYearQuarter</li> <li>• FiscalYearWeek</li> <li>• Year</li> <li>• YearMonth</li> <li>• YearMonthDay</li> <li>• YearQuarter</li> <li>• YearWeek</li> </ul>
<code>groupFields</code>	BatchCalcJobFrcstGrpFld[]	<p>The source fields for grouping the data to be processed by the forecast node.</p>

Field	Field Type	Description
Name		
label	string	Required.
		The name of the forecast node in the UI.
name	string	Required.
		A unique name for the forecast node.
<del>period</del>	string	Required.
		The start date of the forecast period.
<del>seasonality</del>	BatchCalcJobFrcstSeasonality (enumeration of type string)	Represents the periodic fluctuations that occur around the same time every year.
		Possible values are:
		<ul style="list-style-type: none"> <li>• Two</li> <li>• Three</li> <li>• Four</li> <li>• Five</li> <li>• Six</li> <li>• Seven</li> <li>• Eight</li> <li>• Nine</li> <li>• Ten</li> <li>• Eleven</li> <li>• Twelve</li> <li>• Thirteen</li> <li>• Fourteen</li> <li>• Fifteen</li> <li>• Sixteen</li> <li>• Seventeen</li> <li>• Eighteen</li> <li>• Nineteen</li> <li>• Twenty</li> <li>• TwentyOne</li> <li>• TwentyTwo</li> <li>• TwentyThree</li> </ul>

Field Name	Field Type	Description
<del>ignoreLastPeriod</del>	boolean	<ul style="list-style-type: none"> <li>TwentyFour</li> <li>Auto</li> <li>None</li> </ul>
		The default value is <code>None</code> .
<del>sourceName</del>	string	<p>Indicates whether to ignore the last period in the source node when it has incomplete data (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.</p>
<del>sourceName</del>	string	<p>Required. The name of the source node. A source can be any node other than the datasink and register node.</p>

### BtchCalcJobFrcstAggrFld

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

Field Name	Field Type	Description
aggregateFunction	BatchCalcJobAggregateFunction (enumeration of type string)	<p>Required. The function of the aggregate field. Possible values are:</p> <ul style="list-style-type: none"> <li>Avg</li> <li>Count</li> <li>Max</li> <li>Min</li> <li>Std</li> <li>StdP</li> <li>Sum</li> <li>Unique</li> <li>Var</li> <li>VarP</li> </ul>

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

### BatchCalcJobFrcstGrpFld

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

Field Name	Field Type	Description
fieldName	string	Required.  The name of the source field to group the data to be processed by the forecast node.
groupBy	string	A comma-separated list of values to group data by.  Required when the source field type is Date or DateTime.  Possible values are: <ul style="list-style-type: none"> <li>• Second</li> <li>• Second Epoch</li> <li>• Minute</li> <li>• Hour</li> <li>• Day</li> <li>• Day Epoch</li> <li>• Week</li> <li>• Month</li> <li>• Quarter</li> <li>• Year</li> </ul>

### BatchCalcJobHierarchyPath

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

#### Fields

Field Name	Field Type	Description
description	string	Description of the hierarchy path node.

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

## BatchCalcJobFilterCriteria

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

### Fields

Field Name	Field Type	Description
inputVariable	string	Name of the input variable used as a filter.
operator	BatchCalcJobFilterOperator (enumeration of type string)	Required. Operator that is specified in the filter condition.  Valid values are: <ul style="list-style-type: none"><li>• Equals</li><li>• NotEquals</li><li>• GreaterThan</li><li>• GreaterThanOrEqual</li><li>• LessThan</li><li>• LessThanOrEqual</li><li>• StartsWith</li><li>• EndsWith</li><li>• Contains</li><li>• DoesNotContain</li><li>• IsNull</li><li>• IsNotNull</li><li>• In</li><li>• NotIn</li></ul>
sequence	integer	Required. Sequence number used to refer the criteria in a filter node.
sourceFieldName	string	Required. Name of the field from the source node to apply the filter.
value	string	Value used to filter data from the source node.

## BatchCalcJobParameter

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

### Fields

Field Name	Field Type	Description
dataType	BatchCalcJobParameter.DataType (enumeration of type string)	Required. Data type of the parameter. Valid values are: <ul style="list-style-type: none"><li>• Date</li><li>• DateTime</li><li>• Expression</li><li>• FileIdentifier</li><li>• Filter</li><li>• Numeric</li><li>• Text</li></ul>
defaultValue	string	Default value of the parameter.
description	string	Description of the batch calculation job parameter.
isMultiValue	boolean	Indicates whether the parameter has different values ( <code>True</code> ) or not ( <code>False</code> ). This field is supported only for the <code>Text</code> data type.
label	string	Required. Label of the batch calculation job parameter.
name	string	Required. Name of the batch calculation job parameter.

## BatchCalcJobSourceJoin

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

### Fields

Field Name	Field Type	Description
description	string	Description of the join node.
fields	BatchCalcJobJoin.ResultField[]	Collection of fields in a join node.
joinKeys	BatchCalcJobJoin.Key[]	Collection of mapping of fields from the primary source node and the second source node in a join node.
label	string	Required. Label of the join node.
name	string	Required. Name of the join node.
primarySourceName	string	Required. Name associated with the node as the primary source node.
secondarySourceName	string	Required. Name associated with the node as the secondary source node.

Field Name	Field Type	Description
type	BatchCalcJobSourceJoinType (enumeration of type string)	Required. Type of join specified between the primary source node and secondary source node. Valid values are: <ul style="list-style-type: none"><li>• LeftOuter</li><li>• RightOuter</li><li>• Inner</li><li>• Outer</li><li>• Lookup</li></ul>

### BatchCalcJobJoinKey

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

#### Fields

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

### BatchCalcJobJoinResultField

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

#### Fields

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

### BatchCalcJobTransform

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

#### Fields

Field Name	Field Type	Description
description	string	The description of the batch calculation job transform.

Field Name	Field Type	Description
droppedFields	BatchCalcJobTransformDroppedField[]	The collection of dropped fields in a data transformation. Available when the transformation type is <code>Slice</code> .
expressionFields	BatchCalcJobTransformAddedField[]	The collection of formula fields in a data transformation. Available when the transformation type is <code>Expression</code> .
label	string	Required. The label of the batch calculation job transform.
name	string	Required. The name of the batch calculation job transform.
orderBy	BatchCalcJobOrderByField on page 285[]	A collection of fields that's used to sort the records within each partition group.
partitionBy	string[]	A group of fields that's used to partition the source data into partition groups.
sourceName	string	Required. Name of the source node.
transformType	BatchCalcJobTransformType (enumeration of type string)	Required. The type of transformation. Valid values are: <ul style="list-style-type: none"><li>• <code>ComputeRelative</code>—This transformation calculates values based on values of the same partition group.</li><li>• <code>Expression</code>—This transformation calculates values based on existing values of fields in the same record.</li><li>• <code>Slice</code>—This transformation removes fields from the source node.</li></ul>

### BatchCalcJobTransformDroppedField

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

#### Fields

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

### BatchCalcJobTransformAddedField

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

#### Fields

Field Name	Field Type	Description
alias	string	Required. Name that subsequent nodes within the data processing engine use to the transform node.

Field Name	Field Type	Description
dataType	BatchCalcJobDataType (enumeration of type string)	Required. Data type of the formula. Valid values are: <ul style="list-style-type: none"><li>• Boolean—Available in API version 65.0 and later.</li><li>• Date</li><li>• DateTime</li><li>• MultiValue</li><li>• Numeric</li><li>• Text</li></ul>
decimalPlaces	integer	Number of digits to the right of a decimal point in the value. Required for the Numeric data type.
expression	string	Required. Formula defined by the user.
length	integer	Total length of the value including the decimal places. Required for data types: Text and Numeric.

## BatchCalcJobOrderByField

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

### Fields

Field Name	Field Type	Description
name	string	Required. Name of the field that is used to sort data.
orderType	BatchCalcJobOrderType (enumeration of type string)	Order in which the data is sorted. Valid values are: <ul style="list-style-type: none"><li>• Ascending</li><li>• Descending</li></ul>

## BatchCalcJobUnion

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

### Fields

Field Name	Field Type	Description
description	string	Description of the batch calculation job union.
isDisjointedSchema	boolean	Indicates whether the union is of two disjointed datasets (true) or not (false). Set to True to allow joining of two datasets having no common fields.

Field Name	Field Type	Description
label	string	Required. Label of the batch calculation job union.
name	string	Required. Name of the batch calculation job union.
sources	string[]	Names of the source nodes.

## BatchCalcJobWritebackObject

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

### Fields

Field Name	Field Type	Description
canWritebackToNonEditableFields	boolean	Indicates whether the non-editable fields are included in field mapping when the action type is upsert. The default value is <code>false</code> . Available in API version 64.0 and later.
description	string	Descriptions of the batch calculation job writeback object.
externalIdFieldName	string	Unique external field ID for the target object name. Available in API version 60.0 and later.
fields	<a href="#">BatchCalcJobWriteback Mapping[]</a>	Collection of the writeback fields.
filterCondition	string	The condition that filters the records from a writeback dataset for a user. Examples of a filter condition include a user ID, stage name, and a security policy that returns only the records that a user owns. Available in API version 57.0 and later.
folderName	string	The folder where the writeback dataset is saved. Available in API version 57.0 and later.
isChangedRow	boolean	Indicates whether a row in the write back object is changed. Set to <code>True</code> to write back the changed rows.
isExistingDataset	boolean	Indicates whether a CRM Application (CRMA) dataset or a Data Lake object is present ( <code>true</code> ) or will be created ( <code>false</code> ). Available in API version 62.0 and later.
label	string	Required. Name of the write back object.
name	string	Required. Name of the batch calculation job write back object.
operationType	BatchCalcJobWriteback Opn (enumeration of type string)	Type of operation specified. Valid values are: <ul style="list-style-type: none"><li>• <code>Delete</code>—This value is available in API version 56.0 and later.</li><li>• <code>Insert</code></li></ul>

Field Name	Field Type	Description
		<ul style="list-style-type: none"> <li>Overwrite—Available only when <code>storageType</code> is <code>DataLakeObject</code>. This value is available in API version 60.0 and later.</li> <li>Update</li> <li>Upsert</li> </ul>
<code>sharingInheritanceObjectName</code>	string	The name of the source object from which the row-level sharing inheritance settings are applied. Available in API version 57.0 and later.
<code>shouldCreateTargetObject</code>	boolean	Indicates whether target Data Lake Object or Salesforce Object is created in Salesforce ( <code>true</code> ) or not ( <code>false</code> ). Available in API version 65.0 and later.
<code>sourceName</code>	string	Required. Name of the source node associated with the write back object.
<code>storageType</code>	BatchCalcJobWritebackType (enumeration of type string)	<p>Specifies where you want to use the data stored in the source node. Available in API version 57.0 and later.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> <li><code>Analytics</code></li> <li><code>DataLakeObject</code></li> <li><code>sObject</code></li> </ul> <p>The default value is <code>sObject</code>.</p>
<code>targetObjectName</code>	string	Required. Object that is inserted or upserted by the data processing engine.
<code>writebackSequence</code>	integer	Sequence in which the target object is updated by the data processing engine.
<code>writebackUser</code>	string	ID of the user whose permissions decide which objects and fields of the target object can be updated.

## BatchCalcJobWritebackMapping

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

### Fields

Field Name	Field Type	Description
<code>fieldType</code>	string	<p>Target field type on the writeback object. Valid values are:</p> <ul style="list-style-type: none"> <li>Primary Key</li> <li>Qualifier Key</li> </ul> <p>Available in API version 64.0 and later.</p>
<code>isAutogenerated</code>	boolean	<p>Indicates whether the target field value on the writeback object is autogenerated (<code>true</code>) or not (<code>false</code>).</p> <p>Available in API version 64.0 and later.</p>

Field Name	Field Type	Description
parentName	string	Name of the lookup object. Required only when the <code>relationshipName</code> field is defined.
relationshipName	string	Name of the lookup relationship.
runtimeParameter	boolean	Indicates whether the source field from runtime parameter is <code>true</code> or <code>false</code> . The default value is <code>false</code> . Available in API version 59.0 and later.
sourceFieldName	string	Required. Name of the field in the source node that is written back.
targetFieldName	string	Name of the <code>sObject</code> field to which the results are written back.

## Declarative Metadata Sample Definition

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

```

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

```

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

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

```

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

```

```
<label>TextParameter</label>
<name>TextParameter</name>
</parameters>
<processType>Rebates</processType>
<definitionRunMode>Batch</definitionRunMode>
<status>Inactive</status>
<transforms>
  <description>transforms Desc</description>
  <expressionFields>
    <alias>NewLastName</alias>
    <dataType>Text</dataType>
    <expression>TODAY()</expression>
    <length>80</length>
  </expressionFields>
  <label>ManufacturingIndustry</label>
  <name>ManufacturingIndustry</name>
  <sourceName>AccountsOfManufacturingIndustry</sourceName>
  <transformationType>Expression</transformationType>
</transforms>
<transforms>
  <droppedFields>
    <sourceFieldName>NewLastName</sourceFieldName>
  </droppedFields>
  <label>MediaIndustry</label>
  <name>MediaIndustry</name>
  <sourceName>ManufacturingIndustry</sourceName>
  <transformationType>Slice</transformationType>
</transforms>
<transforms>
  <description>compute relative transforms Desc</description>
  <expressionFields>
    <alias>NewLastName</alias>
    <dataType>Text</dataType>
    <expression>rank()</expression>
    <length>80</length>
  </expressionFields>
  <label>ComputeRelativeManufacturingIndustry</label>
  <name>ComputeRelativeManufacturingIndustry</name>
  <orderBy>
    <name>LastName</name>
    <orderType>Ascending</orderType>
  </orderBy>
  <partitionBy>LastName</partitionBy>
  <sourceName>MediaIndustry</sourceName>
  <transformationType>ComputeRelative</transformationType>
</transforms>
<customNodes>
  <name>RebatesCustomNode</name>
  <label>Rebates Custom Node</label>
  <description>customNodes Desc</description>
  <sources>Get_Hierarchy</sources>
  <extensionName>RebatesExpression</extensionName>
  <extensionNamespace>industries_mfg</extensionNamespace>
  <parameters>
```

```

<name>inputColumn</name>
<value>LastName</value>
</parameters>
<parameters>
<name>isFilterCriteria</name>
<value>true</value>
</parameters>
<parameters>
<name>outputColumn</name>
<value>GenName</value>
</parameters>
</customNodes>
<writebacks>
<fields>
<sourceFieldName>GenName</sourceFieldName>
<targetFieldName>LastName</targetFieldName>
</fields>
<isChangedRow>false</isChangedRow>
<label>exportToContact</label>
<name>exportToContact</name>
<description>Export To Contact</description>
<operationType>Insert</operationType>
<sourceName>RebatesCustomNode</sourceName>
<targetObjectName>Contact</targetObjectName>
<writebackSequence>1</writebackSequence>
</writebacks>
<writebacks>
<fields>
<sourceFieldName>CreatedDateYM</sourceFieldName>
<targetFieldName>CreatedDate</targetFieldName>
</fields>
<isChangedRow>false</isChangedRow>
<isExistingDataset>false</isExistingDataset>
<label>exportToContactFC</label>
<name>exportToContactFC</name>
<description>Export To Contact</description>
<operationType>Insert</operationType>
<sourceName>ContactForecast</sourceName>
<targetObjectName>Contact</targetObjectName>
<writebackSequence>2</writebackSequence>
</writebacks>
</BatchCalcJobDefinition>

```

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

```

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

```

```
</types>
<version>60.0</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](#).

## Data Processing Engine Invocable Actions

Run an active Data Processing Engine definition. For more information on custom invocable actions, see [REST API Developer Guide](#) and [Actions Developer Guide](#).

### Data Processing Engine Actions

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

## Data Processing Engine Actions

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

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

This object is available in API version 51.0 and later.

## Supported REST HTTP Methods

### URI

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

### Formats

JSON

### HTTP Methods

GET, POST

### Authentication

`Authorization: Bearer token`

## Inputs

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

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

## Outputs

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

## Usage

### JSON Sample Request to execute PointsAccrual DPE Definition

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

### JSON Sample Response

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

## Example

### GET

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

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

### POST

Here's a request to retrieve DPE definition

```
{
  "inputs": [
    {
      "start_date": "26-09-2023",
      "end_date": "12-12-2023",
      "randomkey": "069SM0000001SgbYAE"
```

```
        }
    ]
}
```

Here's a response for this action.

```
[
  {
    "actionName": "newinputvardefn",
    "errors": null,
    "invocationID": null,
    "isSuccess": true,
    "outputValues": {
      "batchJobId": "0mdSM0000006EJdYAM",
      "accepted": true
    },
    "version": 1
  }
]
```

## Batch Management

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

### EDITIONS

Available in: Lightning Experience

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

#### [Batch Management Tooling API Objects](#)

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

#### [Batch Management Standard Objects](#)

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

#### [Batch Management Metadata API](#)

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

#### [Batch Management Invocable Actions](#)

Run an active Batch Management job definition. For more information on custom invocable actions, see [REST API Developer Guide](#) and [Actions Developer Guide](#).

## Batch Management Tooling API Objects

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

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

### [BatchDataSource](#)

Represents the source of information from which a batch job retrieves records for processing. This object is available in API version 66.0 and later.

### [BatchDataSrcFilterCriteria](#)

Represents the details of a condition in the filter criteria used to retrieve records from the data source of a batch job. This object is available in API version 66.0 and later.

### [BatchProcessJobDefinition](#)

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

### EDITIONS

Available in: Lightning Experience

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

## BatchDataSource

Represents the source of information from which a batch job retrieves records for processing. This object is available in API version 66.0 and later.

### Supported Calls

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

### Fields

Field	Details
<code>BatchJobDefinitionId</code>	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> The ID of the batch job definition associated with batch data source. This field is a relationship field.</p> <p><b>Relationship Name</b> BatchJobDefinition</p> <p><b>Relationship Type</b> Master-detail</p> <p><b>Refers To</b> BatchJobDefinition (the master object)</p>

Field	Details
CriteriaJoinCondition	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The logic that's used to decide how data source records are filtered.</p>
CriteriaJoinType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Restricted picklist, Sort</p> <p><b>Description</b> Specifies the criteria type used to filter data source records.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>all</code>—All conditions are met (AND)</li> <li>• <code>any</code>—Any condition is met (OR)</li> <li>• <code>custom</code>—Customize the logic</li> <li>• <code>none</code>—No conditions are met</li> </ul> <p>The default value is <code>all</code>.</p>
DataSourceType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Specifies the type of data source.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>MultipleSubjects</code></li> <li>• <code>SingleSubject</code></li> </ul>
RelatedSubjects	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The list of objects that are used as data sources for the batch job definition.</p>
SourceFieldName	<p><b>Type</b> string</p>

Field	Details
	<p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The field from the source object that's used to run the batch job.</p>
SourceTableName	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> The name of the object from which records are processed by the batch job.</p>

## BatchDataSrcFilterCriteria

Represents the details of a condition in the filter criteria used to retrieve records from the data source of a batch job. This object is available in API version 66.0 and later.

### Supported Calls

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

### Fields

Field	Details
BatchDataSourceId	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> The ID of the batch data source associated with the batch data source filter criteria. This field is a relationship field.</p> <p><b>Relationship Name</b> BatchDataSource</p> <p><b>Relationship Type</b> Master-detail</p> <p><b>Refers To</b> BatchDataSource (the master object)</p>
DomainObjectName	<p><b>Type</b> string</p>

Field	Details
	<b>Properties</b> Filter, Group, Nillable, Sort
	<b>Description</b> The name of the object that contains the field that's used in the filter criteria condition.
DynamicValueType	<b>Type</b> picklist
	<b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort
	<b>Description</b> Specifies the data type of the input variable that's used in the filter criteria condition.
	Possible values are:
	<ul style="list-style-type: none"> <li>• boolean</li> <li>• currency</li> <li>• date</li> <li>• datetime</li> <li>• integer</li> <li>• picklist</li> <li>• reference</li> <li>• string</li> </ul>
FieldName	<b>Type</b> string
	<b>Properties</b> Filter, Group, Sort
	<b>Description</b> The name of the field that's used in the filter criteria condition.
FieldPath	<b>Type</b> string
	<b>Properties</b> Filter, Group, Nillable, Sort
	<b>Description</b> The patch of the related object field that's used in the filter criteria condition.
FieldValue	<b>Type</b> string
	<b>Properties</b> Filter, Group, Sort

Field	Details
<b>Description</b>	
The value of the specified field used to filter records of the data source.	
FilterCriteriaSequence	<b>Type</b> int
<b>Properties</b>	
Filter, Group, Sort	
<b>Description</b>	
The sequence number of the condition in the filter criteria.	
IsDynamicValue	<b>Type</b> boolean
<b>Properties</b>	
Defaulted on create, Filter, Group, Sort	
<b>Description</b>	
Indicates whether the value of the filter criteria condition is provided by an input variable.	
The default value is <code>false</code> .	
Operator	<b>Type</b> picklist
<b>Properties</b>	
Filter, Group, Restricted picklist, Sort	
<b>Description</b>	
Specifies the operator used in the filter criteria condition.	
Possible values are:	
<ul style="list-style-type: none"> <li>• <code>equals</code>—Equals</li> <li>• <code>excludes</code>—Excludes</li> <li>• <code>greaterThan</code>—Greater Than</li> <li>• <code>greaterThanOrEqualTo</code>—Greater Than Or Equal To</li> <li>• <code>in</code>—In</li> <li>• <code>includes</code>—Includes</li> <li>• <code>isNotNull</code>—Is Not Null</li> <li>• <code>isNull</code>—Is Null</li> <li>• <code>lessThan</code>—Less Than</li> <li>• <code>lessThanOrEqualTo</code>—Less Than Or Equal To</li> <li>• <code>like</code>—Like</li> <li>• <code>notEquals</code>—Not Equals</li> <li>• <code>notIn</code>—Not In</li> </ul>	

## BatchProcessJobDefinition

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

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

Data and processes in your org are impacted if you update or delete a BatchProcessJobDefinition record. Update or delete a Batch Management job using the [Metadata API](#) on page 310.

### Supported SOAP API Calls

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

### Supported REST API Methods

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

### Fields

Field	Details
<code>BatchJobDefinitionId</code>	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The unique identifier of the associated batch job definition. This is a relationship field.</p> <p><b>Relationship Name</b> BatchJobDefinition</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> BatchJobDefinition</p>
<code>BatchJobDefinitionName</code>	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The name of the associated batch job definition.</p>
<code>BatchSize</code>	<p><b>Type</b> int</p> <p><b>Properties</b> Filter, Group, Sort</p>

Field	Details
	<p><b>Description</b> Required. The number of records that each Batch Management job part can process. The maximum number of transaction journal records that a batch management job can process for flow or loyalty program process is 2000.</p>
Description	<p><b>Type</b> textarea</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The description of the Batch Management job.</p>
DeveloperName	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> The developer name of the Batch Management job.</p>
FlowDefinitionId	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The input variable of the associated flow that uniquely identifies each record that the Batch Management job processes.</p>
FullName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Group, Nillable</p> <p><b>Description</b> The name of the Batch Management job. Query this field only if the query result contains no more than one record. Otherwise, an error is returned. If more than one record exists, use multiple queries to retrieve the records. This limit protects performance.</p>
Language	<p><b>Type</b> picklist</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p>

Field	Details
	<p><b>Description</b>  The language in which the batch job is created.  Possible values are:</p> <ul style="list-style-type: none"> <li>• da—Danish</li> <li>• de—German</li> <li>• en_US—English</li> <li>• es—Spanish</li> <li>• es_MX—Spanish (Mexico)</li> <li>• fi—Finnish</li> <li>• fr—French</li> <li>• it—Italian</li> <li>• ja—Japanese</li> <li>• ko—Korean</li> <li>• nl_NL—Dutch</li> <li>• no—Norwegian</li> <li>• pt_BR—Portuguese (Brazil)</li> <li>• ru—Russian</li> <li>• sv—Swedish</li> <li>• th—Thai</li> <li>• zh_CN—Chinese (Simplified)</li> <li>• zh_TW—Chinese (Traditional)</li> </ul>
ManageableState	<p><b>Type</b>  ManageableState enumerated list</p> <p><b>Properties</b>  Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b>  Indicates the manageable state of the specified component that is contained in a package:</p> <ul style="list-style-type: none"> <li>• beta</li> <li>• deleted</li> <li>• deprecated</li> <li>• deprecatedEditable</li> <li>• installed</li> <li>• installedEditable</li> <li>• released</li> <li>• unmanaged</li> </ul>
MasterLabel	<p><b>Type</b>  string</p>

Field	Details
	<b>Properties</b>
	Filter, Group, Sort
	<b>Description</b>
	The label of the Batch Management job.
Metadata	<b>Type</b> complexvalue
	<b>Properties</b>
	Create, Nillable, Update
	<b>Description</b>
	The Batch Management job's metadata.
	Query this field only if the query result contains no more than one record. Otherwise, an error is returned. If more than one record exists, use multiple queries to retrieve the records. This limit protects performance.
NamespacePrefix	<b>Type</b> string
	<b>Properties</b>
	Filter, Group, Nillable, Sort
	<b>Description</b>
	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 <b>namespacePrefix__componentName</b> notation.
	The namespace prefix can have one of the following values.
	<ul style="list-style-type: none"> <li>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.</li> <li>In orgs that are not Developer Edition orgs, <code>NamespacePrefix</code> is set only for objects that are part of an installed managed package. All other objects have no namespace prefix.</li> </ul>
ProcessGroup	<b>Type</b> string
	<b>Properties</b>
	Filter, Group, Nillable, Sort
	<b>Description</b>
	The group or team for which the Batch Management job processes records.

Field	Details
RecordIdVariable	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The unique identifier that identifies each record that must be processed by the Batch Management job.</p>
RetryCount	<p><b>Type</b> int</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Sort</p> <p><b>Description</b> Required. The number of times this Batch Management job must be rerun in case it fails.</p>
RetryInterval	<p><b>Type</b> int</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Sort</p> <p><b>Description</b> Required. The number of milliseconds after which the Batch Management job must be rerun in case it fails. A retry interval can be 1,000–10,000 milliseconds.</p>
Status	<p><b>Type</b> picklist</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> The status of the Batch Management job. Possible values are:<ul style="list-style-type: none"> <li>• Active</li> <li>• Inactive</li> </ul></p>
Type	<p><b>Type</b> picklist</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> The type of process for which the Batch Management job processes records. Possible values are:<ul style="list-style-type: none"> <li>• Flow</li> </ul></p>

Field	Details
	<ul style="list-style-type: none"> <li>• BulkUpdate</li> <li>• ConsumptionOveragesCalculation</li> <li>• DecisionTableRefresh</li> <li>• DeepCloneSalesAgreement</li> <li>• EntitlementCreationBatchJob</li> <li>• HighScaleBreProcess</li> <li>• IndustriesLSCommercial</li> <li>• LoyaltyProgramProcess</li> <li>• ManagerProvisioning</li> <li>• NetUnitRateCalculation</li> <li>• PbbToOptyConversion</li> <li>• ProductCatalogCacheRefresh</li> <li>• RatableSummaryCreation</li> <li>• SummaryCreation</li> </ul> <p>The default value is <code>Flow</code>. Other types may be available to you depending on the licenses available in your org.</p> <p>This field is available in API version 55.0 and later.</p>
TypeInstance	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> Required. The API name of the process that the Batch Management job must execute.</p>

## Batch Management Standard Objects

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

### [BatchProcessJobDefView](#)

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

### [BatchProcessJobDefView](#)

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

### EDITIONS

Available in: Lightning Experience

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

## Supported Calls

`describeSObjects(), query()`

## Fields

Field	Details
DurableId	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The unique identifier for the field. Always retrieve this value before using it, as the value isn't guaranteed to stay the same from one release to the next. Simplify queries by using this field instead of making multiple queries.</p>
IsActive	<p><b>Type</b> boolean</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Sort</p> <p><b>Description</b> Indicates whether the definition is active.</p>
Label	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The label of the Batch Job definition.</p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The name of the Batch Job definition.</p>
NamespacePrefix	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> 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</p>

Field	Details
	<p>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"> <li>• 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.</li> <li>• In organizations that are not Developer Edition organizations, NamespacePrefix is only set for objects that are part of an installed managed package. There is no namespace prefix for all other objects.</li> </ul>
ProcessDefinition	<p><b>Type</b></p>
	<p>textarea</p>
	<p><b>Properties</b></p>
	<p>Nillable</p>
	<p><b>Description</b></p>
	<p>The name of the process group for the batch process job definition.</p>
ProcessGroup	<p><b>Type</b></p>
	<p>string</p>
	<p><b>Properties</b></p>
	<p>Filter, Group, Nillable, Sort</p>
	<p><b>Description</b></p>
	<p>The team or group for which the definition processes records.</p>
SourceObjectName	<p><b>Type</b></p>
	<p>string</p>
	<p><b>Properties</b></p>
	<p>Filter, Group, Nillable, Sort</p>
	<p><b>Description</b></p>
	<p>The API name of the object whose records are processed.</p>
Type	<p><b>Type</b></p>
	<p>string</p>
	<p><b>Properties</b></p>
	<p>Filter, Group, Nillable, Sort</p>
	<p><b>Description</b></p>
	<p>The type of process for which the Batch Management job processes records.</p>
	<p>Possible values are:</p>
	<ul style="list-style-type: none"> <li>• Flow</li> <li>• LoyaltyProgramProcess</li> </ul>

Field	Details
TypeInstance	<p>This field is available in API version 55.0 and later.</p>
TypeInstance	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The API name of the process that's processed by the Batch Job definition.</p>

## Batch Management Metadata API

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

### EDITIONS

#### [BatchProcessJobDefinition](#)

Represents the details of a Batch Management job definition. This type extends the Metadata metadata type and inherits its `fullName` field.

#### [BatchProcessJobDefinition](#)

Represents the details of a Batch Management job definition. This type extends the Metadata metadata type and inherits its `fullName` field.

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

Available in: Lightning Experience

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

### File Suffix and Directory Location

BatchProcessJobDefinition components have the suffix `.batchProcessJobDefinition` and are stored in the `batchProcessJobDefinitions` folder.

### Version

BatchProcessJobDefinition components are available in API version 51.0 and later.

### Special Access Rules

To use this metadata type, your Salesforce org must have the Loyalty Management or the Rebate Management license. The Loyalty Program Process type is only available in orgs that have Loyalty Management enabled.

## Fields

Field Name	Field Type	Description
batchSize	integer	Required. Number of records that each Batch Management job can process. Flow type Batch Management jobs can process up to 2000 records and Loyalty Program Process type Batch Management jobs can process up to 250 records.
dataSource	BatchDataSource on page 312	Required. Source of information whose records must be processed by the Batch Management job.
description	string	Description of the Batch Management job, up to 255 characters.
executionProcessApiName	string	<p>API name of process that must be executed by the Batch Management job. This field is available in API version 55.0 and later.</p> <ul style="list-style-type: none"> <li>• If the batch job's type is Flow, enter the API name of an active flow that the batch job must execute.</li> <li>• If the batch job's type is Loyalty Program Process, enter: <ul style="list-style-type: none"> <li>– Transaction_Journals if you want the batch job to process Transaction Journal records by applying the applicable active loyalty program process of the type TransactionJournal.</li> <li>– API name of an active loyalty process of the type TierProcessing if you want the batch job to run the loyalty program process to assess the tier of eligible members. The API name consists of the name of the process, the process type, and the name of the loyalty program separated by two consecutive underscores. For example, the process API name is Update Member Tier_TierProcessing_Inner Circle if the process name is Update Member Tier, the process type is TierProcessing, and the loyalty program name is Inner Circle.</li> </ul> </li> </ul> <p>You can use database-based APEX classes that let you use flex queues in the Batch Management job, allowing to place more than 5 jobs in a queue. This functionality is applicable to all Industry Clouds that use managed packages. See <a href="#">Apex Flex Queue</a>.</p>
flowApiName	string	<p>API name of an active flow process that must be executed by the Batch Management job.</p> <p> <b>Note:</b> You can either specify the flow API name in the executionProcessApiName field or in the flowApiName field.</p>
flowInputVariable	string	Input variable of associated flow that is used by the batch job to uniquely identify records.
masterLabel	string	Required. Name of the Batch Management job, up to 80 characters.
processGroup	string	Required. Name of the group for which the Batch Management job processes records.

Field Name	Field Type	Description
retryCount	integer	Required. Number of times this Batch Management job must be rerun in case it fails. The maximum retry count is 3. Valid values are 1–3.
retryInterval	integer	Required. Number of milliseconds after which the Batch Management job must be rerun in case it fails. Valid values are 1,000–10,000.
status	string	Indicates the status of the Batch Management job. Valid values are <code>Active</code> and <code>Inactive</code> .
type	string (enumeration of type string)	The type of process that the Batch Management job must execute. This field is available in API version 55.0 and later. Valid values are: <ul style="list-style-type: none"> <li>• <code>Flow</code></li> <li>• <code>Loyalty Program Process</code></li> </ul>

## BatchDataSource

Represents the source of information whose records must be processed by the Batch Management job.

### Fields

Field Name	Field Type	Description
condition	string	Required. Criteria defined to filter the records.
criteria	string	Type of filter criteria that's used to filter records for processing.
dataSourceType	string	Type of data source that's used to create the batch job definition. Valid values are: <ul style="list-style-type: none"> <li>• <code>SingleSobject</code></li> <li>• <code>MultiSobject</code></li> </ul> Available in API version 64.0 and later.
filters	<a href="#">BatchDataSrcFilterCriteria on page 313</a>	Filter criterion that decides which records must be processed by the Batch Management job.
orderFields	<a href="#">BatchDataSourceOrderField on page 314</a>	Fields that are used to order the records before the records are added to a batch in a job.
sourceObject	string	Required. API name of an object whose records must be processed by the batch job.  If the batch job type is Loyalty Program Process, the source object must be: <ul style="list-style-type: none"> <li>• <code>TransactionJournal</code> if the batch job is used to process transaction journals by applying the applicable loyalty program process.</li> <li>• An object that stores the details of loyalty program members whose tier must be assessed by the loyalty program process specified in the <code>executionProcessApiName</code> field.</li> </ul>

Field Name	Field Type	Description
sourceObjectField	string	<p>API name of the source object field that uniquely identifies records for which the batch job is executed. This field is available in API version 57.0 and later.</p> <p>This field is only applicable when the batch job's type is Loyalty Program Process and a TierProcess type active loyalty program process is specified in the <code>executionProcessApiName</code> field. Specify the API name of a field that is a lookup to the <code>LoyaltyProgramMember</code> object and uniquely identifies the members whose tier must be assessed.</p>

## BatchDataSrcFilterCriteria

Represents the filter conditions that decide which records must be processed by the Batch Management job.

### Fields

Field Name	Field Type	Description
domainObjectName	string	Name of the object the field is associated with. Available in API version 64.0 and later.
dynamicValueType	string	Data type of the input variable used as a filter.
fieldName	string	Required. Name of the field that must be used to filter records.
fieldPath	string	Stores the path to a field in the object. Available in API version 64.0 and later.
fieldValue	string	Required. Value of the field that must be filtered. Specify the field if <code>isDynamicValue</code> is set to <code>False</code> .
isDynamicValue	boolean	Required. Indicates whether the filter criteria is dynamic.
operator	string (enumeration of type string)	<p>Required. Operator that is specified in the filter criteria. Valid values are:</p> <ul style="list-style-type: none"> <li>• <code>equals</code></li> <li>• <code>excludes</code></li> <li>• <code>greaterThan</code></li> <li>• <code>greaterThanOrEqualTo</code></li> <li>• <code>in</code></li> <li>• <code>includes</code></li> <li>• <code>lessThan</code></li> <li>• <code>LessThanOrEqual</code></li> <li>• <code>GreaterOrEqual</code></li> <li>• <code>like</code></li> <li>• <code>notEquals</code></li> <li>• <code>notIn</code></li> </ul>
sequenceNo	integer	Required. Sequence number used to refer the criteria in a filter.

## BatchDataSourceOrderField

Represents the fields that are used to group data.

### Fields

Field Name	Field Type	Description
domainObjectName	string	Required. Name of the object the field is associated with. Available in API version 64.0 and later.
fieldName	string	Required. Name of the field that must be used to filter records. Available in API version 64.0 and later.
fieldPath	string	Required. Stores the path to a field in the object. Available in API version 64.0 and later.

### Declarative Metadata Sample Definition

The following is an example of a BatchProcessJobDefinition component.

```

<?xml version="1.0" encoding="UTF-8"?>
<BatchProcessJobDefinition xmlns="http://soap.sforce.com/2006/04/metadata">
    <batchSize>10</batchSize>
    <dataSource>
        <condition>1</condition>
        <criteria>all</criteria>
        <filters>
            <dynamicValue>false</dynamicValue>
            <dynamicValueType>string</dynamicValueType>
            <fieldName>Name</fieldName>
            <fieldValue>abcd</fieldValue>
            <operator>equals</operator>
            <sequenceNo>1</sequenceNo>
        </filters>
        <sourceObject>Account</sourceObject>
    </dataSource>
    <flowApiName>Flow1</flowApiName>
    <flowInputVariable>recordId</flowInputVariable>
    <masterLabel>BatchJob1</masterLabel>
    <processGroup>Loyalty</processGroup>
    <retryCount>2</retryCount>
    <retryInterval>1000</retryInterval>
    <status>Inactive</status>
    <description>test</description>
    <type>Flow</type>
    <executionProcessApiName>testFlow</executionProcessApiName>
</BatchProcessJobDefinition>

```

The following is an example of a Flow object used in Metadata API.

```

<?xml version="1.0" encoding="UTF-8"?>

```

```
<!--
~ Copyright 2020 Salesforce, Inc.
~ All Rights Reserved
~ Company Confidential
-->
<Flow xmlns="http://soap.sforce.com/2006/04/metadata">
    <apiVersion>51.0</apiVersion>
    <interviewLabel>Flow1 {!$Flow.CurrentDateTime}</interviewLabel>
    <label>Flow1</label>
    <processMetadataValues>
        <name>BuilderType</name>
        <value>
            <stringValue>LightningFlowBuilder</stringValue>
        </value>
    </processMetadataValues>
    <processMetadataValues>
        <name>OriginBuilderType</name>
        <value>
            <stringValue>LightningFlowBuilder</stringValue>
        </value>
    </processMetadataValues>
    <processType>AutoLaunchedFlow</processType>
    <recordLookups>
        <name>getAcc</name>
        <label>getAcc</label>
        <locationX>614</locationX>
        <locationY>465</locationY>
        <assignNullValuesIfNoRecordsFound>false</assignNullValuesIfNoRecordsFound>
        <filterLogic>and</filterLogic>
        <filters>
            <field>Id</field>
            <operator>Equal To</operator>
            <value>
                <elementReference>recordId</elementReference>
            </value>
        </filters>
        <getFirstRecordOnly>true</getFirstRecordOnly>
        <object>Account</object>
        <storeOutputAutomatically>true</storeOutputAutomatically>
    </recordLookups>
    <start>
        <locationX>73</locationX>
        <locationY>213</locationY>
        <connector>
            <targetReference>getAcc</targetReference>
        </connector>
    </start>
    <status>Draft</status>
    <variables>
        <name>recordId</name>
        <dataType>String</dataType>
        <isCollection>false</isCollection>
        <isInput>true</isInput>
        <isOutput>false</isOutput>
    </variables>

```

```
</variables>
</Flow>
```

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>*
```

## Wildcard Support in the Manifest File

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

## Batch Management Invocable Actions

Run an active Batch Management job definition. For more information on custom invocable actions, see [REST API Developer Guide](#) and [Actions Developer Guide](#).

### Batch Job Actions

Run an active Batch Management job definition. This action executes a defined Batch Management job asynchronously.

#### Submit Failed Records Batch Job

Run to resubmit an existing batch job with failed records for processing. This action executes the batch job asynchronously.

## Batch Job Actions

Run an active Batch Management job definition. This action executes a defined Batch Management job asynchronously.

A Batch Management job processes a flow in manageable parts. For more information about running an active Batch Management jobs, see [Schedule a Batch Job](#) in Salesforce Help.

This object is available in API version 51.0 and later.

## Supported REST HTTP Methods

### URI

`/services/data/vXX.X/actions/custom/batchJobAction`

### Formats

JSON

### HTTP Methods

GET, POST

## Authentication

Authorization: Bearer **token**

## Inputs

The batch job action uses the batch job definition ID and input variables to execute the job and generate a batch job ID. The input values vary according to the input variables in that flow.

## Outputs

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

## Usage

A request body is always required. The input values vary according to the input variables in that flow. If your batch job doesn't require any input variables, you still must send an empty JSON body.

```
{
  "inputs": [{}]
}
```

### JSON Sample Request

```
{
  "noOfEmployees" : 900,
  "accountIndustry" : "Technology"
}
```

### JSON Sample Response

```
{
  "batchJobId": "01Mxx0000A000001EAA",
  "accepted": "true"
}
```

## Submit Failed Records Batch Job

Run to resubmit an existing batch job with failed records for processing. This action executes the batch job asynchronously.

This object is available in API version 52.0 and later.

## Supported REST HTTP Methods

### URI

/services/data/v**xx.x**/actions/standard/submitFailedRecordsBatchJob

**Formats**

JSON

**HTTP Methods**

GET, POST

**Authentication**Authorization: Bearer **token****Inputs**

Input	Details
failedRecordIds	<p><b>Type</b> array</p> <p><b>Description</b> The IDs of failed records in a batch job.</p>
parentBatchJobId	<p><b>Type</b> string</p> <p><b>Description</b> Required. The ID of a batch job with failed records.</p>

**Outputs**

Output	Details
batchJobId	<p><b>Type</b> string</p> <p><b>Description</b> The ID of a batch job generated after the request is successful. This batch job ID is used to track the progress of the batch job in Monitor Workflow Services in the org.</p>
status	<p><b>Type</b> string</p> <p><b>Description</b> Indicates whether a batch job succeeded or failed.</p>

**Usage****JSON Sample Request**

```
{
  "inputs": [
    {
      "parentBatchJobId": "0mdRM0000004DXrYAM",
      "failedRecordIds": [
        ...
      ]
    }
  ]
}
```

```

        "001RM000005AG0bYAG", "001RM000005AERZYA4", "001RM000005AG0WYAW"
    ]
}
}

```

### JSON Sample Response

```

[ {
    "actionName" : "submitFailedRecordsBatchJob",
    "errors" : null,
    "isSuccess" : true,
    "outputValues" : {
        "batchJobId" : "0mdRM000004DZ9YAM"
    }
} ]

```

## Monitor Workflow Services

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

The objects of Monitor Workflow Services aren't available in Object Manager of your Salesforce org.

### BatchJob

Represents an instance of a batch job that is either running and has been run. This object is available in API version 51.0 and later.

### BatchJobPart

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

### BatchJobPartFailedRecord

Represents records that a batch job part couldn't successfully process. This object is available in API version 51.0 and later.

### EDITIONS

Available in: Lightning Experience

Available in: Monitor Workflow Services is available with Enterprise, Unlimited, and Performance Editions where Data Processing Engine or Batch Management is available

## BatchJob

Represents an instance of a batch job that is either running and has been run. This object is available in API version 51.0 and later.

## Supported Calls

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

## Fields

Field	Details
AdditionalInformation	Type
	textarea

Field	Details
	<p><b>Properties</b> Create, Nullable, Update</p> <p><b>Description</b> A JSON that contains additional context about the batch job.</p>
BatchJobDefinitionId	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> The unique identifier of the associated batch job definition. This is a relationship field.</p> <p><b>Relationship Name</b> BatchJobDefinition</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> BatchJobDefinition</p>
BatchJobDefinitionName	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> The developer name of the associated batch job definition.</p>
EndTime	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nullable, Sort</p> <p><b>Description</b> The timestamp when the batch job run was completed.</p>
ErrorDescription	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Nullable, Sort</p> <p><b>Description</b> The error message in case the batch job run failed.</p>

Field	Details
ExecutionStage	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b> Specifies the stage at which the batch job's run failed. This field is available in API version 66.0 and later.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• Datasync</li> <li>• Execution</li> <li>• Preprocessing</li> <li>• Writeback</li> </ul>
ExternalReference	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The unique identifier of the process that's running or has run the batch job.</p>
IsDebugOn	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> Indicates whether debug mode was turned on (true) or not (false) when a definition was run. The default value is <code>false</code>.</p>
IsDebugRecipeDeleted	<p><b>Type</b> boolean</p> <p><b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b> Indicates whether debug recipes and datasets were deleted (true) or not (false). When the IsDebugOn is set to True, and the definition is run, after 7 days IsDebugRecipeDeleted is automatically set to True, and debug recipes and datasets are deleted. The default value is <code>false</code>.</p>

Field	Details
LastReferencedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp for when the current user last viewed the batch job.</p>
LastViewedDate	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp for when the current user last viewed this item.</p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, idLookup, Sort</p> <p><b>Description</b> The name of the batch job.</p>
OwnerId	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> Unique identifier of the user who initiated the batch job run. This is a polymorphic relationship field.</p> <p><b>Relationship Name</b> Owner</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> Group, User</p>
ProcessGroup	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> The group or team for which the batch job is run.</p>

Field	Details
RetryCount	<p><b>Type</b> int</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The number of times the batch job run is automatically rerun in case it fails.</p>
RuntimeParameter	<p><b>Type</b> textarea</p> <p><b>Properties</b> Nillable</p> <p><b>Description</b> The values of the input variables that are used as filter criteria in a Batch Management job.</p>
StartTime	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp when the batch job run was started.</p>
Status	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Restricted picklist, Sort</p> <p><b>Description</b> The status of the batch job run. Possible values are:</p> <ul style="list-style-type: none"> <li>• Canceled</li> <li>• Completed</li> <li>• CompletedWithFailures</li> <li>• Failed</li> <li>• InProgress</li> <li>• Queued</li> <li>• QueueingInProgress</li> <li>• Submitted</li> </ul>
TotalInputRecordCount	<p><b>Type</b> int</p>

Field	Details
	<p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The total number of records that were provided as input to the batch job. This field is available in API version 66.0 and later.</p>
TotalProcessedRecordCount	<p><b>Type</b> int</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The total number of records that were processed by all the batch job parts associated with the batch job. This field is available in API version 66.0 and later.</p>
Type	<p><b>Type</b> picklist</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Restricted picklist, Sort</p> <p><b>Description</b> The type of batch job that is run. Possible values are: <ul style="list-style-type: none"> <li>Calc—Data Processing Engine</li> <li>DecisionTableRefresh</li> <li>Flow</li> <li>DeepCloneSalesAgreement</li> <li>ManagerProvisioning</li> </ul> The process types available to you vary depending on the licenses available in your org.</p>
UtilisedExecutionLimit	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> The CRM Analytics or Data 360 execution capacity utilized by Data Processing Engine batch jobs before the current run started. This field is available in API version 66.0 and later.</p>
UtilisedWritebackLimit	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p>

Field	Details
	<p><b>Description</b> The CRM Analytics or Data 360 writeback capacity utilized by Data Processing Engine batch jobs before the current run started. This field is available in API version 66.0 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.

### BatchJobFeed

Feed tracking is available for the object.

### BatchJobHistory

History is available for tracked fields of the object.

## BatchJobPart

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

When a batch job is run, it is divided into multiple parts. Each part is used to process a specific number of records.

## Supported Calls

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

## Fields

Field	Details
BatchJobId	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> The unique identifier of the associated batch job. This is a relationship field.</p> <p><b>Relationship Name</b> BatchJob</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> BatchJob</p>
EndTime	<p><b>Type</b> dateTime</p>

Field	Details
	<p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp when the batch job part was processed.</p>
ErrorMessage	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The error message in case the batch job part failed.</p>
FailedRecFileBody	<p><b>Type</b> base64</p> <p><b>Properties</b> Nillable</p> <p><b>Description</b> Contains the details of the records that the batch job part failed to process.</p>
FailedRecFileContentType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Shows the type of data that the batch job part failed to process. For example, <code>application/html</code> or <code>text/csv</code>.</p>
FailedRecFileLength	<p><b>Type</b> int</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The character length of the failed record file.</p>
FailedRecFileName	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The name of the file that contains the details of the failed records.</p>

Field	Details
FailedRecordCount	<p><b>Type</b> int</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The number of records that the batch job part couldn't process.</p>
FailedRowCount	<p><b>Type</b> long</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The number of records that were processed but the batch job part failed to write back for a Data Processing Engine definition run. This field is available in API version 66.0 and later.</p>
InputRecordCount	<p><b>Type</b> int</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The number of records that the batch job part must process.</p>
InputRowCount	<p><b>Type</b> long</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The number of records that were submitted to the batch job part for a Data Processing Engine definition run. This field is available in API version 66.0 and later.</p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, idLookup, Sort</p> <p><b>Description</b> The name of the batch job part.</p>
OutputRecordCount	<p><b>Type</b> int</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p>

Field	Details
	<p><b>Description</b> The number of records the batch job part has processed.</p>
OutputRowCount	<p><b>Type</b> long</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The number of records that were processed by the batch job part for a Data Processing Engine definition run. This field is available in API version 66.0 and later.</p>
ParentBatchJobPartId	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The unique identifier of the part batch job part associated with the batch job part. This is a relationship field.</p> <p><b>Relationship Name</b> ParentBatchJobPart</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> BatchJobPart</p>
RecordFileBody	<p><b>Type</b> base64</p> <p><b>Properties</b> Nillable</p> <p><b>Description</b> Contains the details of the records that the batch job part processed.</p>
RecordFileContentType	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Shows the type of data that the batch job part processed. For example, application/html or text/csv.</p>

Field	Details
RecordFileLength	<p><b>Type</b> int</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The character length of the file that contains the records that the batch job part processed.</p>
RecordFileName	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The name of the file that contains the details of the records that the batch job part processed.</p>
RetryCount	<p><b>Type</b> int</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The number of times the batch job part is automatically rerun in case it fails.</p>
StartTime	<p><b>Type</b> dateTime</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The timestamp when the batch job part's run was started.</p>
Status	<p><b>Type</b> picklist</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Restricted picklist, Sort</p> <p><b>Description</b> The status of the batch job part.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• Canceled</li> <li>• Completed</li> <li>• Failed</li> <li>• InProgress</li> <li>• New</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>Waiting</li> </ul>
Type	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> The type of node in case the associated batch job is of the type Calc (Data Processing Engine). Possible values are:</p> <ul style="list-style-type: none"> <li>Aggregate</li> <li>Analysis</li> <li>Append</li> <li>AtomicWriteback</li> <li>Compute</li> <li>CsvIngestion</li> <li>Custom</li> <li>Datasync</li> <li>Execution</li> <li>Filter</li> <li>Forecast</li> <li>Hierarchy</li> <li>Join</li> <li>OutputRecordsNode</li> <li>Register</li> <li>Slice</li> <li>Source</li> <li>Summary</li> <li>Transform</li> <li>Writeback</li> </ul>
UserReference	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The ID of the user who is assigned as the writeback user in the Writeback Object node of the Data Processing Engine definition for which the batch job part has written back results. This field is available in API version 66.0 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.

### BatchJobPartFeed

Feed tracking is available for the object.

### BatchJobPartHistory

History is available for tracked fields of the object.

## BatchJobPartFailedRecord

Represents records that a batch job part couldn't successfully process. This object is available in API version 51.0 and later.

## Supported Calls

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

## Fields

Field	Details
BatchJobId	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The unique identifier of the associated batch job. This is a relationship field.</p> <p><b>Relationship Name</b> BatchJob</p> <p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> BatchJob</p>
BatchJobPartId	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> The unique identifier of the associated batch job part. This is a relationship field.</p> <p><b>Relationship Name</b> BatchJobPart</p>

Field	Details
	<p><b>Relationship Type</b> Lookup</p> <p><b>Refers To</b> BatchJobPart</p>
ErrorDescription	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Nillable, Sort</p> <p><b>Description</b> The error message that indicates why the batch job part couldn't process the records.</p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, idLookup, Sort</p> <p><b>Description</b> The name of the batch job part failed record.</p>
Record	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The unique identifier of the batch record that processed the failed records.</p>
RecordName	<p><b>Type</b> string</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The name of the record that's associated with the batch job part failed record.</p>
ResubmittedBatchJobId	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The batch job used to submit failed records. This field is available in API version 52.0 and later. This is a relationship field.</p>

Field	Details
	<p><b>Relationship Name</b> ResubmittedBatchJob</p>
	<p><b>Relationship Type</b> Lookup</p>
	<p><b>Refers To</b> BatchJob</p>
<b>Status</b>	<p><b>Type</b> picklist</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Specifies the status of the failed records. This field is available in API version 52.0 and later. Possible values are:</p> <ul style="list-style-type: none"> <li>• Failed</li> <li>• Resubmitted</li> </ul> <p>The default value is 'Failed'.</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.

### **BatchJobPartFailedRecordFeed**

Feed tracking is available for the object.

### **BatchJobPartFailedRecordHistory**

History is available for tracked fields of the object.

# STOCK ROTATION

Manage structured product returns and inventory replacement programs. Automate the end-to-end lifecycle of stock rotation, from partner submission and validation to claim creation and budget tracking.

Available in: **Enterprise**, **Professional**, and **Unlimited** Editions with the Channel Revenue Management add on

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## [Stock Rotation Business APIs](#)

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

## Stock Rotation Business APIs

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

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

### [Resources](#)

Learn more about the available Stock Rotation API resources.

### [Request Bodies](#)

Learn more about the available request bodies of Stock Rotation APIs.

### [Response Bodies](#)

Learn more about the available response bodies of Stock Rotation APIs.

## Resources

Learn more about the available Stock Rotation API resources.

### [Stock Rotation Execution \(POST\)](#)

Performs a stock rotation action for the specified line items and filters.

## Stock Rotation Execution (POST)

Performs a stock rotation action for the specified line items and filters.

### Resource

```
/connect/stock-rotation-execution
```

### Resource example

```
https://yourInstance.salesforce.com/services/data/v66.0/connect/stock-rotation-execution
```

**Available version**

66.0

**HTTP methods**

POST

**Request body for POST****JSON example**

```
{
  "actionType": "GenerateClaim",
  "stockRotationExecutionId": "1Ft1234567890abcdef",
  "sourceObjectIds": [
    "obj-1",
    "obj-2",
    "obj-3"
  ],
  "filterCriteria": {
    "fieldCriteria": [
      {
        "fieldApiName": "AcceptedQuantity",
        "operator": "Greater Than",
        "filterValues": [
          "100"
        ]
      },
      {
        "fieldApiName": "Status",
        "operator": "In",
        "filterValues": [
          "ReadyForClaim"
        ]
      }
    ]
  }
}
```

**Properties**

Name	Type	Description	Required or Optional	Available Version
actionType	String	<p>The action to perform on the stock rotation execution. Valid values are:</p> <ul style="list-style-type: none"> <li>• <code>GenerateClaim</code> — Generate claims for scrapped items and returns.</li> <li>• <code>CalculateClaimAmount</code> — Calculate the claim amount for the stock rotation line items that are filtered.</li> </ul>	Required	66.0

Name	Type	Description	Required or Optional	Available Version
filterCriteria	<a href="#">Stock Rotation Filter Criteria Input</a>	The filter criteria for selecting stock rotation line items.	Optional. Either sourceObjectIds or filterCriteria must be provided.	66.0
sourceObjectIds	String[]	The IDs of stock rotation line items to include in the action.	Optional. Either sourceObjectIds or filterCriteria must be provided.	66.0
stockRotationExecutionId	String	The ID of the stock rotation execution to run the action on.	Required.	66.0

### Response body for POST

[Stock Rotation Execution](#) on page 338

## Request Bodies

Learn more about the available request bodies of Stock Rotation APIs.

### [Stock Rotation Execution Input](#)

Input representation for performing an action on a stock rotation execution.

### [Stock Rotation Field Criteria Input](#)

Individual filter criteria for stock rotation operations

## Stock Rotation Execution Input

Input representation for performing an action on a stock rotation execution.

### JSON example

```
{
  "actionType": "GenerateClaim",
  "stockRotationExecutionId": "1Ft1234567890abcdef",
  "sourceObjectIds": [
    "obj-1",
    "obj-2",
    "obj-3"
  ],
  "filterCriteria": {
    "fieldCriteria": [
      {
        "fieldApiName": "AcceptedQuantity",
        "operator": "Greater Than",
        "filterValues": [
          "100"
        ]
      }
    ]
  }
}
```

```
        "100"
    ]
}
{
  "fieldApiName": "Status",
  "operator": "In",
  "filterValues": [
    "ReadyForClaim"
  ]
}
]
}
}
```

## Properties

Name	Type	Description	Required or Optional	Available Version
actionType	String	<p>The action to perform on the stock rotation execution. Valid values are:</p> <ul style="list-style-type: none"> <li>• <code>GenerateClaim</code> — Generate claims for scrapped items and returns.</li> <li>• <code>CalculateClaimAmount</code> — Calculate the claim amount for the stock rotation line items that are filtered.</li> </ul>	Required	66.0
filterCriteria	Stock Rotation Filter Criteria Input	The filter criteria for selecting stock rotation line items.	Optional. Either <code>sourceObjectIds</code> or <code>filterCriteria</code> must be provided.	66.0
sourceObjectIds	String[]	The IDs of stock rotation line items to include in the action.	Optional. Either <code>sourceObjectIds</code> or <code>filterCriteria</code> must be provided.	66.0
stockRotationExecutionId	String	The ID of the stock rotation execution to run the action on.	Required.	66.0

## Stock Rotation Field Criteria Input

## Individual filter criteria for stock rotation operations

## JSON example

```
{  
  "filterCriteria": [  
    {
```

```

    "fieldApiName": "Industry__c",
    "operator": "Equals",
    "filterValues": [
        "Healthcare"
    ]
}
]
}
}

```

## Properties

Name	Type	Description	Required or Optional	Available Version
fieldApiName	String	The API name of the field to filter on.	Required	66.0
filterValues	Array of String	The values used to filter line items based on the field and operator.	Required	66.0
operator	String	The comparison operator applied to the field. Valid values are: <ul style="list-style-type: none"> <li>Contains</li> <li>Equals</li> <li>GreaterThan</li> <li>GreaterThanOrEqual</li> <li>In</li> <li>LessThan</li> <li>LessThanOrEqual</li> <li>NotEquals</li> <li>NotIn</li> </ul>	Required	66.0

## Response Bodies

Learn more about the available response bodies of Stock Rotation APIs.

### Stock Rotation Execution

Output representation for a stock rotation action request.

### Stock Rotation Output Error

Represents an error returned by a stock rotation action, including the error code and a message explaining the failure.

## Stock Rotation Execution

Output representation for a stock rotation action request.

### JSON example

```
{
  "stockRotationExecutionId": "1Ft1234567890abcdef",
}
```

```

    "isSuccess": true,
    "errorDetails": null
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
errorDetails	Stock Rotation Output Error[]	Details of errors if the operation was unsuccessful.	Big, 66.0	66.0
isSuccess	Boolean	Indicates whether the operation was successful (true) or not (false).	Big, 66.0	66.0
stockRotationExecutionId	String	The stock rotation execution ID that was processed.	Big, 66.0	66.0

## Stock Rotation Output Error

Represents an error returned by a stock rotation action, including the error code and a message explaining the failure.

### JSON example

```

{
  "errorDetails": [
    {
      "code": "VALIDATION_ERROR",
      "message": "Action type is required"
    }
  ]
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
code	String	The error code for the failure.	Big, 66.0	66.0
message	String	The error message for the failure.	Big, 66.0	66.0

# SHIP AND DEBIT PROCESS MANAGEMENT

Use Ship and Debit Process Management to create ship and debit programs and set up special prices and discounts that partners receive for different products.

Available in: **Enterprise**, **Professional**, and **Unlimited** Editions with the Channel Revenue Management add on

## [Ship and Debit Process Management Standard Objects](#)

Ship and Debit Process Management data model provides objects and fields to create and manage end-to-end ship and debit programs. Use these objects to define special pricing and discounts, enabling manufacturers to compensate partners for competitively priced products and protect partner margins.

## Ship and Debit Process Management Standard Objects

Ship and Debit Process Management data model provides objects and fields to create and manage end-to-end ship and debit programs. Use these objects to define special pricing and discounts, enabling manufacturers to compensate partners for competitively priced products and protect partner margins.

### EDITIONS

Available in: Lightning Experience

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

### [Channel Partner Inventory Tracking Object in Ship and Debit Process Management](#)

Channel Partner Inventory Tracking provides access to a standard object that you can use in Ship and Debit Process Management to monitor the deduction details and link credit and debit transactions.

### [Rebate Management Objects in Ship and Debit Process Management](#)

Rebate Management provides access to standard objects that you can use in Ship and Debit Process Management to create and manage end-to-end ship and debit programs.

## Channel Partner Inventory Tracking Object in Ship and Debit Process Management

Channel Partner Inventory Tracking provides access to a standard object that you can use in Ship and Debit Process Management to monitor the deduction details and link credit and debit transactions.

For more information about the Channel Partner Inventory Tracking object, refer to this resource.

- [PartnerUnsoldInvLedger](#) on page 9

## Rebate Management Objects in Ship and Debit Process Management

Rebate Management provides access to standard objects that you can use in Ship and Debit Process Management to create and manage end-to-end ship and debit programs.

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

- [RebateClaim](#) on page 169
- [RebateClaimAdjustment](#) on page 177
- [RebateMemberClaimAggregate](#) on page 180
- [RebatePartnerSpecialPrcTrm](#) on page 190
- [RebateProgram](#) on page 196
- [RebateProgramMember](#) on page 199
- [RebatePtnrSpclPrcTrmBnft](#) on page 205

# CHANNEL REVENUE MANAGEMENT ASSOCIATED OBJECTS

This section provides a list of objects associated to Channel Revenue Management standard objects with their standard fields.

Some fields may not be listed for some objects. To see the system fields for each object, see [System Fields](#) in the *Object Reference for Salesforce and Lightning Platform*.

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

## [StandardObjectName Feed Feed](#)

*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.

## [StandardObjectName History History](#)

*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.

## [StandardObjectName OwnerSharingRule OwnerSharingRule](#)

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

## [StandardObjectName Share Share](#)

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

## [StandardObjectName Feed Feed](#)

*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><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> The ID of the comment marked as best answer on a question post.</p>
Body	<p><b>Type</b> textarea</p> <p><b>Properties</b> Nillable, Sort</p> <p><b>Description</b> 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>
CommentCount	<p><b>Type</b> int</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> The number of comments associated with this feed item.</p>
ConnectionId	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Nillable, Sort</p> <p><b>Description</b> When a PartnerNetworkConnection 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 PartnerNetworkConnection. Available if Salesforce to Salesforce is enabled for your organization.</p>

Field	Details
InsertedById	<p><b>Type</b> reference</p> <p><b>Properties</b> Group, Nillable, Sort</p> <p><b>Description</b> 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><b>Type</b> boolean</p> <p><b>Properties</b> Defaulted on create, Filter, Group, Sort</p> <p><b>Description</b> 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"> <li>• <code>&lt;p&gt;</code></li> </ul> <p> <b>Tip:</b> Though the <code>&lt;br&gt;</code> tag isn't supported, you can use <code>&lt;p&gt;&amp;nbsp;&lt;/p&gt;</code> to create lines.</p> <ul style="list-style-type: none"> <li>• <code>&lt;a&gt;</code></li> <li>• <code>&lt;b&gt;</code></li> <li>• <code>&lt;code&gt;</code></li> <li>• <code>&lt;i&gt;</code></li> <li>• <code>&lt;u&gt;</code></li> <li>• <code>&lt;s&gt;</code></li> <li>• <code>&lt;ul&gt;</code></li> <li>• <code>&lt;ol&gt;</code></li> <li>• <code>&lt;li&gt;</code></li> <li>• <code>&lt;img&gt;</code></li> </ul> <p>The <code>&lt;img&gt;</code> tag is accessible only through the API and must reference files in Salesforce similar to this example: <code>&lt;img src="sfdc://069B0000000omjh"&gt;&lt;/img&gt;</code></p> <p> <b>Note:</b> 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><b>Type</b> int</p>

Field	Details
	<p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> The number of likes associated with this feed item.</p>
LinkUrl	<p><b>Type</b> url</p> <p><b>Properties</b> Nillable, Sort</p> <p><b>Description</b> The URL of a <code>LinkPost</code>.</p>
NetworkScope	<p><b>Type</b> picklist</p> <p><b>Properties</b> Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> 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"> <li>• <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.</li> <li>• <code>AllNetworks</code>—The feed item is available in all Experience Cloud sites.</li> </ul> <p>Note the following exceptions for <code>NetworkScope</code>:</p> <ul style="list-style-type: none"> <li>• Only feed items with a Group or User parent can set a <code>NetworkId</code> or a null value for <code>NetworkScope</code>.</li> <li>• For feed items with a record parent, users can set <code>NetworkScope</code> only to <code>AllNetworks</code>.</li> <li>• You can't filter a feed item on the <code>NetworkScope</code> field.</li> </ul>
ParentId	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> ID of the record that is tracked in the feed. The detail page for the record displays the feed.</p>
RelatedRecordId	<p><b>Type</b> reference</p>

Field	Details
	<p><b>Properties</b> Group, Nillable, Sort</p> <p><b>Description</b> ID of the ContentVersion record associated with a ContentPost. This field is null for all posts except ContentPost.</p>
Title	<p><b>Type</b> string</p> <p><b>Properties</b> Group, Nillable, Sort</p> <p><b>Description</b> 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><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> The type of feed item. Values are:</p> <ul style="list-style-type: none"> <li>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).</li> </ul> <p>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.</p> <ul style="list-style-type: none"> <li>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.</li> <li>AnnouncementPost—Not used.</li> <li>ApprovalPost—generated when a user submits an approval.</li> <li>BasicTemplateFeedItem—Not used.</li> <li>CanvasPost—a post made by a canvas app posted on a feed.</li> <li>CollaborationGroupCreated—generated when a user creates a public group.</li> <li>CollaborationGroupUnarchived—Not used.</li> <li>ContentPost—a post with an attached file.</li> <li>CreatedRecordEvent—generated when a user creates a record from the publisher.</li> <li>DashboardComponentAlert—generated when a dashboard metric or gauge exceeds a user-defined threshold.</li> <li>DashboardComponentSnapshot—created when a user posts a dashboard snapshot on a feed.</li> </ul>

Field	Details
	<ul style="list-style-type: none"> <li>• <code>LinkPost</code>—a post with an attached URL.</li> <li>• <code>PollPost</code>—a poll posted on a feed.</li> <li>• <code>ProfileSkillPost</code>—generated when a skill is added to a user's Chatter profile.</li> <li>• <code>QuestionPost</code>—generated when a user posts a question.</li> <li>• <code>ReplyPost</code>—generated when Chatter Answers posts a reply.</li> <li>• <code>RipplePost</code>—generated when a user creates a Thanks badge in WDC.</li> <li>• <code>TextPost</code>—a direct text entry on a feed.</li> <li>• <code>TrackedChange</code>—a change or group of changes to a tracked field.</li> <li>• <code>UserStatus</code>—automatically generated when a user adds a post. Deprecated.</li> </ul>
<code>Visibility</code>	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Specifies whether this feed item is available to all users or internal users only. This field is available if digital experiences is enabled for your org.</p> <p><code>Visibility</code> can have the following values:</p> <ul style="list-style-type: none"> <li>• <code>AllUsers</code>—The feed item is available to all users who have permission to see the feed item.</li> <li>• <code>InternalUsers</code>—The feed item is available to internal users only.</li> </ul> <p>Note the following exceptions for <code>Visibility</code>:</p> <ul style="list-style-type: none"> <li>• For record posts, <code>Visibility</code> is set to <code>InternalUsers</code> for all internal users by default.</li> <li>• External users can set <code>Visibility</code> only to <code>AllUsers</code>.</li> <li>• On user and group posts, only internal users can set <code>Visibility</code> to <code>InternalUsers</code>.</li> </ul>

## Usage

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

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

## Object That Follows This Model

This object follows the standard pattern for associated feed objects.

- [BatchJob](#)
- [BatchJobPart](#)
- [BatchJobPartFailedRecord](#)

## StandardObjectName History History

*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()`

## 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>StandardObjectNameId</i>	<p><b>Type</b> reference</p> <p><b>Properties</b> Filter, Group, Sort</p> <p><b>Description</b> ID of the standard object.</p>
<i>DataType</i>	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b> Data type of the field that was changed.</p>
<i>Field</i>	<p><b>Type</b> picklist</p> <p><b>Properties</b> Filter, Group, Restricted picklist, Sort</p>

Field Name	Details
	<p><b>Description</b> Name of the field that was changed.</p>
NewValue	<p><b>Type</b> anyType</p> <p><b>Properties</b> Nillable, Sort</p> <p><b>Description</b> New value of the field that was changed.</p>
OldValue	<p><b>Type</b> anyType</p> <p><b>Properties</b> Nillable, Sort</p> <p><b>Description</b> Old value of the field that was changed.</p>

## Objects That Follow This Model

These objects follow the standard pattern for associated history objects.

- [AccountLeadTime](#)
- [BatchJob](#)
- [BatchJobPart](#)
- [BatchJobPartFailedRecord](#)
- [PartnerStagedData](#)
- [PartnerUnsoldInventory](#)
- [PartnerUnsoldInvLedger](#)
- [PtnrlnvltmRecon](#)
- [PtnrlnvltmReconTrace](#)

## StandardObjectName OwnerSharingRule OwnerSharingRule

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

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



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

## Supported Calls

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

## Special Access Rules

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

## Fields

Field Name	Details
AccessLevel	<p><b>Type</b> picklist</p> <p><b>Properties</b> Create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b> Determines the level of access users have to records. Values are:</p> <ul style="list-style-type: none"> <li>• Read (read only)</li> <li>• Edit (read/write)</li> </ul>
Description	<p><b>Type</b> textarea</p> <p><b>Properties</b> Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b> Description of the sharing rule. Maximum length is 1000 characters.</p>
DeveloperName	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b> 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</p>

Field Name	Details
	<p>object's name in a managed package and the changes are reflected in a subscriber's organization.</p> <p> <b>Note:</b> When creating large sets of data, always specify a unique <code>DeveloperName</code> for each record. If no <code>DeveloperName</code> is specified, performance slows down while Salesforce generates one for each record.</p>
GroupId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> ID of the source group. Records that are owned by users in the source group trigger the rule to give access.</p>
Name	<p><b>Type</b> string</p> <p><b>Properties</b> Create, Filter, Group, idLookup, Sort, Update</p> <p><b>Description</b> Label of the sharing rule as it appears in the UI. Maximum length is 80 characters.</p>
UserOrGroupId	<p><b>Type</b> reference</p> <p><b>Properties</b> Create, Filter, Group, Sort</p> <p><b>Description</b> ID of the user or group that you are granting access to.</p>

## Objects That Follow This Model

These objects follow the standard pattern for associated owner sharing rule objects.

- [AccountLeadTime](#)
- [PartnerStagedData](#)
- [PartnerUnsoldInventory](#)

## StandardObjectName Share Share

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

The object name is variable and uses *StandardObjectNameShare* syntax. For example, AccountBrandShare is a sharing entry on an account brand. We list the available associated share objects at the end of this topic. For specific version information, see the standard object documentation.

## Supported Calls

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

## Special Access Rules

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

## Fields

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

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

## Object That Follows This Model

This object follows the standard pattern for associated share objects.

- [AccountLeadTime](#)
- [TransitTime](#)
- [PartnerStagedData](#)
- [PartnerUnsoldInventory](#)