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# Salesforce Contracts

Version 66.0, Spring '26



## Spring '26



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# CHAPTER 1 Salesforce Contracts

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Salesforce Contracts is a next-generation Contract Lifecycle Management (CLM) application that enables businesses to efficiently and collaboratively manage their contracts, right from authoring and negotiations through approval and execution. Documents, data, and life cycles of multiple types of contracts can be managed centrally in Salesforce, providing organizations complete visibility into their contracting activities. Salesforce Contracts provides a highly usable, configurable, and extensible contracting platform that can be integrated with industry specific use cases. Salesforce Contracts functionality is centered around the "Contract" object of Salesforce, which is enriched and extended to support this new application.

# Salesforce Contracts Standard Objects

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Use standard objects to work with the Salesforce Contracts application.

## [ClauseCatgConfiguration](#)

Represents the configuration about the clause category that can be used in a response document by the user.

## [ContextUseCaseMapping](#)

Represents the setup configuration details such as the context definition and mapping definitions used to invoke context service APIs. This object is available in API version 61.0 and later.

## [ContractDocumentReview](#)

Represents the review process-related details, such as the reference object type and review status. This object is available in API version 58.0 and later.

## [ContractDocumentVersion](#)

Tracks contract document versions through contract lifecycle stages. This object is available in API version 56.0 and later.

## [ContractDocVerContentDoc](#)

Associates a contract document version with a content document. This object is available in API version 56.0 and later.

## [ContractDocVersionSection](#)

Tracks contract document sections through contract lifecycle stages. This object is available in API version 56.0 and later.

## [ContractExtractionResult](#)

Represents contract-specific data extracted by the Contracts AI from an uploaded PDF that's ready for review. For example, account name, owner, start date, contract name, contract record type, contract term, and clauses. Before contract record creation, users can access, review, and modify the temporarily stored information. This object is available in API version 60.0 and later.

## [ContractType](#)

A sub type that groups contracts with similar characteristics, such as lifecycle states, permissions, and templates and clauses used. This object is available in API version 56.0 and later.

## [ContractTypeConfig](#)

The settings that define the characteristics and behavior of all contracts of that type. This object is available in API version 56.0 and later.

## [DocGenerationBatchProcess](#)

Represents a grouping of document generation requests associated with the batch document generation ID. Only one batch document generation request can be processed at a time. To create a new batch document generation record, pause or cancel the current record. This object is available in API version 58.0 and later.

## [DocGenBtchStsChgEvent](#)

Represents the change in the status of the batch document generation request. A batch document generation request groups multiple document generation requests by associating the individual requests with a batch document generation ID. This object is available in API version 62.0 and later.

## [DocGenProcStsChgEvent](#)

Represents the change in status of a document generation request. This object is available in API version 62.0 and later.

## [DocumentAuthoredContent](#)

Represents the metadata of the content within the content boundary of a document such as a template or contract document. You can store metadata details of the marked clauses and sections in Salesforce with the document authored content. This object is available in API version 58.0 and later.

### [DocumentClause](#)

Represents a clause that can be associated with multiple documents.

### [DocumentClauseSet](#)

Represents a grouping for clauses, which can hold multiple variations of the same clause such as main clause and alternate pre-approved clauses based on language.

### [DocumentEnvelope](#)

The container for a document that is routed for signatures. This object is available in API version 56.0 and later.

### [DocumentGenerationProcess](#)

Supports server-side document generation requests and responses. This object is available in API version 56.0 and later.

### [DocumentGenerationSetting](#)

Represents an org's settings for automatic document generation from templates. This object is available in API version 54.0 and later.

### [DocumentTemplate](#)

Represents information about dynamic document generation. This object is available in API version 56.0 and later.

### [DocumentTemplateConfig](#)

Represents the shadow object that supports migration of document templates between environments. The Developer field in the shadow object references the UniqueName field in the document template object and is used to retrieve the document template details. For internal use only. This object is available in API version 58.0 and later.

### [DocumentTemplateSection](#)

Represents a section in a document template. A document template section can be a clause, image, context, embedded template, or signature. This object is available in API version 52.0 and later.

### [ESignatureConfig](#)

The settings for integrating with external eSignature providers. This object is available in API version 56.0 and later.

### [ESignatureEnvelopeConfig](#)

The notification-specific settings for integrating with external eSignature providers. This object is available in API version 56.0 and later.

### [ExternalDocStorageConfig](#)

Represents a collection of fields to configure the external document storage for an object. It includes details such as location, path, and named credentials. For example, OneDrive is defined as an External Document Storage and is associated with the Salesforce Contract object.

### [GeneratedDocumentSection](#)

Represents a section of a generated document. This object is available in API version 60.0 and later.

### [ObjectStateActionDefinition](#)

Represents the link between the object state definition and object state transition based on a defined action.

### [ObjectStateTransitionAction](#)

Represents a junction between object state transition and object state action definition. State transition determines the valid transition of an object from one state to another and the state action determines which action triggers which state transition.

### [Obligation](#)

Represents an obligation between parties to fulfill agreed conditions, such as contractual commitments. The obligation commitment assists with a strategy to achieve the desired outcome within a set timeframe and reduce risk with compliance tracking. For example, payment due dates, contract terms, renewals. This object is available in API version 59.0 and later.

[SalesContractLine](#)

Stores a contract's product information, including price, quantity, and components covered. This object is available in API version 56.0 and later.

[UserEsignVendorIdentifier](#)

Used for integrating eSignature users. This object is available in API version 56.0 and later.

## SEE ALSO:

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

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

## ClauseCatgConfiguration

Represents the configuration about the clause category that can be used in a response document by the user.

### Supported Calls

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

### Special Access Rules

Salesforce Org must have ClauseManagement platform license enabled. Users must have the ClauseManagementAddOn license to access this object.

### Fields

| Field       | Details   |
|-------------|---|
| Description | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>The description about the clause category configuration.</p> |
| MasterLabel | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>The name of the clause library category used in the configuration.</p> |
| UsageType   | <p><b>Type</b><br/>picklist</p>   |

| Field | Details  |
|-------|--|
|       | <p><b>Properties</b><br/>Create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b><br/>Specifies the usage of the clause category.<br/>Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>ContractClauseCategory</code>—Contract Clause Category</li> <li>• <code>DisclosureCategory</code>—Disclosure Category</li> </ul> |

## Associated Objects

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

### **ClauseCatgConfigurationChangeEvent**

Change events are available for the object.

### **ClauseCatgConfigurationFeed**

Feed tracking is available for the object.

### **ClauseCatgConfigurationHistory**

History is available for tracked fields of the object.

### **ClauseCatgConfigurationOwnerSharingRule**

Sharing rules are available for the object.

### **ClauseCatgConfigurationShare**

Sharing is available for the object.

## ContextUseCaseMapping

Represents the setup configuration details such as the context definition and mapping definitions used to invoke context service APIs. This object is available in API version 61.0 and later.

## Supported Calls

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

## Fields

| Field                              | Details  |
|------------------------------------|--|
| <code>ContextDefinitionName</code> | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Create, Filter, Group, Sort, Update</p> |

| Field         | Details  |
|---------------|--|
|               | <p><b>Description</b><br/>The name of the context definition that stores the hydration and persistence mapping details.</p>  |
| DeveloperName | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>The developer name of the record.</p>   |
| Language      | <p><b>Type</b><br/>picklist</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b><br/>The language associated with this record.<br/>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> |
| MasterLabel   | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Create, Filter, Group, Sort, Update</p>   |

| Field               | Details  |
|---------------------|--|
|                     | <p><b>Description</b></p> <p>The user interface label for context use case mapping.</p>  |
| NamespacePrefix     | <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 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><i>namespacePrefix__componentName</i></b> notation.</p> <p>The namespace prefix can have one of the following values.</p> <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> |
| MappingName         | <p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Sort, Update</p> <p><b>Description</b></p> <p>The name of the mapping that's associated with the MappingType.</p>  |
| MappingType         | <p><b>Type</b></p> <p>picklist</p> <p><b>Properties</b></p> <p>Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b></p> <p>Specifies the mapping type used for context use case mapping.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• Hydration</li> <li>• Persistence</li> </ul> <p>The default value is <code>Hydration</code>.</p>   |
| ReferenceObjectName | <p><b>Type</b></p> <p>string</p>   |

| Field                       | Details   |
|-----------------------------|---|
|                             | <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>The standard or custom source object from which the context mapping is fetched.</p>  |
| TargetObjectCustomFieldName | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>The name of the custom field in the target object that's used to link the target object with the reference object.</p>   |
| TargetObjectName            | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>The name of the standard or custom object to which context mapping from the reference object is pushed.</p>  |
| UseCaseType                 | <p><b>Type</b><br/>picklist</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b><br/>Specifies the usage for which the context definition and mapping are defined.<br/>Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>ContractCreationOrUpdation</code>—Create Contract or Update Contract</li> <li>• <code>ContractExtraction</code>—Extract Contract Details</li> </ul> <p>The default value is <code>ContractCreationOrUpdation</code>.</p> |

## Associated Objects

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

### [ContextUseCaseMappingChangeEvent](#)

Change events are available for the object.

### [ContextUseCaseMappingFeed](#)

Feed tracking is available for the object.

**ContextUseCaseMappingHistory**

History is available for tracked fields of the object.

**ContextUseCaseMappingOwnerSharingRule**

Sharing rules are available for the object.

**ContextUseCaseMappingShare**

Sharing is available for the object.

## ContractDocumentReview

Represents the review process-related details, such as the reference object type and review status. This object is available in API version 58.0 and later.

### Supported Calls

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

### Special Access Rules

ContractDocumentReview is available if your org has the DocGen platform license and related addon and user licenses.

### Fields

| Field                     | Details   |
|---------------------------|---|
| ContractDocumentVersionId | <p><b>Type</b><br/>reference</p> <p><b>Properties</b><br/>Create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>The contract document version associated with the external document.<br/>This field is a relationship field.</p> <p><b>Relationship Name</b><br/>ContractDocumentVersion</p> <p><b>Relationship Type</b><br/>Lookup</p> <p><b>Refers To</b><br/>ContractDocumentVersion</p> |
| ExternalReviewerEmail     | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Create, Filter, Group, Sort, Update</p>  |

| Field                      | Details   |
|----------------------------|---|
|                            | <p><b>Description</b><br/>The email ID for the document reviewer.</p>   |
| ExternalReviewerIdentifier | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Filter, Group, Nillable, Sort</p> <p><b>Description</b><br/>The alphanumeric external identifier for the reviewer.</p>   |
| Name                       | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Create, Filter, Group, idLookup, Sort, Update</p> <p><b>Description</b><br/>Name of contract document.</p>   |
| Status                     | <p><b>Type</b><br/>picklist</p> <p><b>Properties</b><br/>Create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b><br/>The status of document review. The default value is <code>NotStarted</code>.<br/>Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>Completed</code>—Complete</li> <li>• <code>InProgress</code>—In Progress</li> <li>• <code>NotStarted</code>—Not Started</li> </ul> |
| UnresolvedCommentCount     | <p><b>Type</b><br/>int</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>The number of unresolved comments in the document.</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.

### ContractDocumentReviewChangeEvent

Change events are available for the object.

**ContractDocumentReviewFeed**

Feed tracking is available for the object.

**ContractDocumentReviewHistory**

History is available for tracked fields of the object.

**ContractDocumentReviewOwnerSharingRule**

Sharing rules are available for the object.

**ContractDocumentReviewShare**

Sharing is available for the object.

## ContractDocumentVersion

Tracks contract document versions through contract lifecycle stages. This object is available in API version 56.0 and later.

### Supported Calls

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

### Fields

| Field             | Details  |
|-------------------|--|
| ContractId        | <p><b>Type</b><br/>reference</p> <p><b>Properties</b><br/>Create, Filter, Group, Sort</p> <p><b>Description</b><br/>The ID of the contract associated with the contract document version.<br/>This is a relationship field.</p> <p><b>Relationship Name</b><br/>Contract</p> <p><b>Relationship Type</b><br/>Lookup</p> <p><b>Refers To</b><br/>Contract</p> |
| CreatedByFullName | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>User who created this contract document version.</p>  |

| Field                     | Details   |
|---------------------------|---|
| CreationProcessType       | <p><b>Type</b><br/>picklist</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b><br/>Indicates how the document version was created<br/>Possible values are:</p> <ul style="list-style-type: none"> <li>• BatchMode—Batch Mode</li> <li>• Checkout</li> <li>• CheckoutModify—Checkout Modify</li> <li>• ContractReconciliation—Contract Reconciliation</li> <li>• CreateContract—Create Contract</li> <li>• Customize</li> <li>• External_Online_Editor—Microsoft 365</li> <li>• Generate</li> <li>• Import</li> <li>• Microsoft365ExternalReview—Non-Private External Review</li> <li>• Microsoft365PrivateExternalReview—Private External Review</li> <li>• ReconcileWord</li> <li>• UpdateContract</li> </ul> |
| DocConversionResourceName | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>The name of the resource containing the Microsoft Word document file used to generate the output web document.</p>   |
| DocumentTemplateId        | <p><b>Type</b><br/>reference</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>Document Template Identifier.<br/>This is a relationship field.</p> <p><b>Relationship Name</b><br/>DocumentTemplate</p> <p><b>Relationship Type</b><br/>Lookup</p>   |

| Field                    | Details   |
|--------------------------|---|
|                          | <p><b>Refers To</b><br/>DocumentTemplate</p>  |
| HasNewTemplateVersionAvl | <p><b>Type</b><br/>boolean</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>Indicates whether the latest version of the template is newer than the version used to generate the document.<br/><br/>The default value is 'false'.</p> |
| HasReconRedlinedSection  | <p><b>Type</b><br/>boolean</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>Indicates whether this contract document version contains red lines.<br/><br/>The default value is 'false'.</p>  |
| HasRedlinedSection       | <p><b>Type</b><br/>boolean</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>Indicates whether this contract document version contains red lines.<br/><br/>The default value is 'false'.</p>  |
| IsDocumentVersionLocked  | <p><b>Type</b><br/>boolean</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>Indicates whether the document is locked.<br/><br/>The default value is 'false'.</p>   |
| IsLockedByCurrentUser    | <p><b>Type</b><br/>boolean</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Sort, Update</p>  |

| Field                     | Details  |
|---------------------------|--|
|                           | <p><b>Description</b><br/>Indicates whether the user currently accessing the document has locked the document.<br/>The default value is 'false'.</p>   |
| IsSectionInfoStoredInDoc  | <p><b>Type</b><br/>boolean</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>Indicates whether section IDs are stored in the document (used for internal processing).<br/>The default value is 'false'.</p>              |
| ShouldBypassStateMdlTrnst | <p><b>Type</b><br/>boolean</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>Indicates whether the Contract State Model Transition is bypassed (true) or ignored (false).<br/>The default value is 'false'.</p>          |
| LastReferencedDate        | <p><b>Type</b><br/>dateTime</p> <p><b>Properties</b><br/>Filter, Nillable, Sort</p> <p><b>Description</b><br/>The timestamp for when the current user last viewed a record related to this record.</p>   |
| LastViewedDate            | <p><b>Type</b><br/>dateTime</p> <p><b>Properties</b><br/>Filter, Nillable, Sort</p> <p><b>Description</b><br/>The timestamp for when the current user last viewed this record. If this value is null, this record might only have been referenced (LastReferencedDate) and not viewed.</p> |
| LockType                  | <p><b>Type</b><br/>picklist</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b><br/>Specifies the reason why the document version is locked.</p>   |

| Field                     | Details  |
|---------------------------|--|
|                           | <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• Generate</li> <li>• SuperUser</li> <li>• User</li> </ul>  |
| LockedById                | <p><b>Type</b><br/>reference</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>ID of the user who locked this version.<br/>This is a relationship field.</p> <p><b>Relationship Name</b><br/>LockedBy</p> <p><b>Relationship Type</b><br/>Lookup</p> <p><b>Refers To</b><br/>User</p> |
| LockedByUsername          | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>Name of the user who locked this version.</p>   |
| NonStandardSectionCount   | <p><b>Type</b><br/>int</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>Count of non-standard sections.</p>  |
| ReconRedlinedSectionCount | <p><b>Type</b><br/>int</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>Total count of sections that contain red lines in the document version.</p>  |

| Field                | Details  |
|----------------------|--|
| RedlinedSectionCount | <p><b>Type</b><br/>int</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>Total count of sections that contain red lines in the document version.</p>  |
| Status               | <p><b>Type</b><br/>picklist</p> <p><b>Properties</b><br/>Create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b><br/>Contract document version status.<br/>Possible values are:</p> <ul style="list-style-type: none"> <li>• Active</li> <li>• Inactive</li> <li>• Draft</li> </ul> |
| VersionNumber        | <p><b>Type</b><br/>int</p> <p><b>Properties</b><br/>Create, Filter, Group, idLookup, Sort, Update</p> <p><b>Description</b><br/>Contract document version number.</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.

### [ContractDocumentVersionChangeEvent](#)

Change events are available for the object.

### [ContractDocumentVersionFeed](#)

Feed tracking is available for the object.

### [ContractDocumentVersionHistory](#)

History is available for tracked fields of the object.

### [ContractDocumentVersionOwnerSharingRule](#)

Sharing rules are available for the object.

### [ContractDocumentVersionShare](#)

Sharing is available for the object.

## ContractDocVerContentDoc

Associates a contract document version with a content document. This object is available in API version 56.0 and later.

### Supported Calls

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

### Fields

| Field                     | Details  |
|---------------------------|--|
| ContentDocumentId         | <p><b>Type</b><br/>reference</p> <p><b>Properties</b><br/>Create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>ID of the content document associated with the contract document version content document.<br/><br/>This is a relationship field.</p> <p><b>Relationship Name</b><br/>ContentDocument</p> <p><b>Relationship Type</b><br/>Lookup</p> <p><b>Refers To</b><br/>ContentDocument</p> |
| ContentVersion            | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>Identifies the content version.</p>   |
| ContractDocumentVersionId | <p><b>Type</b><br/>reference</p> <p><b>Properties</b><br/>Create, Filter, Group, Sort</p> <p><b>Description</b><br/>ID of the contract document version.<br/><br/>This is a relationship field.</p> <p><b>Relationship Name</b><br/>ContractDocumentVersion</p>  |

| Field                   | Details   |
|-------------------------|---|
|                         | <p><b>Relationship Type</b><br/>Lookup</p> <p><b>Refers To</b><br/>ContractDocumentVersion</p>  |
| DocumentSourceType      | <p><b>Type</b><br/>picklist</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b><br/>Source where the generated document originated.<br/>Possible values are:</p> <ul style="list-style-type: none"> <li>• Content</li> <li>• External</li> </ul> <p>The default value is 'Content'.</p>  |
| DocumentType            | <p><b>Type</b><br/>picklist</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b><br/>Specifies the document type of the contract.<br/>Possible values are:</p> <ul style="list-style-type: none"> <li>• AttachedDocument—Attached Document</li> <li>• ComparisonDocument—Comparison Document</li> <li>• ContractDocument—Contract Document</li> <li>• ExternalReviewDocument—External Review Document</li> <li>• SignedDocument—Signed Document</li> </ul> |
| IsGeneratedDocCheckedIn | <p><b>Type</b><br/>boolean</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>Indicates whether the generated document is checked in.<br/>The default value is 'false'.</p>  |
| LastReferencedDate      | <p><b>Type</b><br/>dateTime</p>   |

| Field                         | Details  |
|-------------------------------|--|
|                               | <p><b>Properties</b><br/>Filter, Nillable, Sort</p> <p><b>Description</b><br/>The timestamp for when the current user last viewed a record related to this record.</p>   |
| LastViewedDate                | <p><b>Type</b><br/>dateTime</p> <p><b>Properties</b><br/>Filter, Nillable, Sort</p> <p><b>Description</b><br/>The timestamp for when the current user last viewed this record. If this value is null, this record might only have been referenced (LastReferencedDate) and not viewed.</p>   |
| Name                          | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Create, Filter, Group, idLookup, Sort, Update</p> <p><b>Description</b><br/>Lists the contract document name.</p>   |
| RelatedCntrDocVerContentDocId | <p><b>Type</b><br/>reference</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>ID of the contract document version content document that links PDF and Word documents.<br/><br/>This is a relationship field.</p> <p><b>Relationship Name</b><br/>RelatedCntrDocVerContentDoc</p> <p><b>Relationship Type</b><br/>Lookup</p> <p><b>Refers To</b><br/>ContractDocVerContentDoc</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.

### [ContractDocVerContentDocChangeEvent](#)

Change events are available for the object.

**ContractDocVerContentDocFeed**

Feed tracking is available for the object.

**ContractDocVerContentDocHistory**

History is available for tracked fields of the object.

**ContractDocVerContentDocOwnerSharingRule**

Sharing rules are available for the object.

**ContractDocVerContentDocShare**

Sharing is available for the object.

## ContractDocVersionSection

Tracks contract document sections through contract lifecycle stages. This object is available in API version 56.0 and later.

### Supported Calls

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

### Fields

| Field                     | Details   |
|---------------------------|---|
| ContractDocumentVersionId | <p><b>Type</b><br/>reference</p> <p><b>Properties</b><br/>Create, Filter, Group, Sort</p> <p><b>Description</b><br/>Contract Document Version to which this section belongs.<br/>This is a relationship field.</p> <p><b>Relationship Name</b><br/>ContractDocumentVersion</p> <p><b>Relationship Type</b><br/>Lookup</p> <p><b>Refers To</b><br/>ContractDocumentVersion</p> |
| CreationProcessType       | <p><b>Type</b><br/>picklist</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b><br/>Indicates how this section was created.<br/>Possible values are:</p>   |

| Field                     | Details  |
|---------------------------|--|
|                           | <ul style="list-style-type: none"> <li>• BatchMode</li> <li>• Customize</li> <li>• Generate</li> <li>• Import</li> <li>• ReconcileWord</li> <li>• UpdateContract</li> </ul> <p>The default value is 'Generate'.</p>  |
| DisplayHeaderFontStyle    | <p><b>Type</b><br/>textarea</p> <p><b>Properties</b><br/>Create, Nillable, Update</p> <p><b>Description</b><br/>The default font style of a section header in the generated web document.</p>  |
| DocumentTemplateClauseId  | <p><b>Type</b><br/>reference</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>Clause from which this contract section is created.<br/>This is a relationship field.</p> <p><b>Relationship Name</b><br/>DocumentTemplateClause</p> <p><b>Relationship Type</b><br/>Lookup</p> <p><b>Refers To</b><br/>DocumentTemplateClause</p> |
| DocumentTemplateSectionId | <p><b>Type</b><br/>reference</p> <p><b>Properties</b><br/>Create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>The template section from which this contract section is created.<br/>This is a relationship field.</p> <p><b>Relationship Name</b><br/>DocumentTemplateSection</p> <p><b>Relationship Type</b><br/>Lookup</p>   |

| Field                 | Details  |
|-----------------------|--|
|                       | <p><b>Refers To</b><br/>DocumentTemplateSection</p>  |
| HasReconciledRedlines | <p><b>Type</b><br/>boolean</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>Indicates whether the contract section contains reconciled red lines.<br/>The default value is 'false'.</p>     |
| IsBeginSplitSection   | <p><b>Type</b><br/>boolean</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>Indicates that a section split in the generated web document begins here.<br/>The default value is 'false'.</p> |
| IsEndSplitSection     | <p><b>Type</b><br/>boolean</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>Indicates that a section split in the generated web document ends here.<br/>The default value is 'false'.</p>   |
| IsRedlinedSection     | <p><b>Type</b><br/>boolean</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>Indicates whether the contract section contains red lines.<br/>The default value is 'false'.</p>                |
| IsSectionStandard     | <p><b>Type</b><br/>boolean</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>Indicates whether a section conforms to its template.</p>   |

| Field                    | Details   |
|--------------------------|---|
|                          | The default value is 'false'.   |
| Level                    | <p><b>Type</b><br/>int</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>Level of this section in the section hierarchy.</p>     |
| ReconciledSectionContent | <p><b>Type</b><br/>textarea</p> <p><b>Properties</b><br/>Create, Nillable, Update</p> <p><b>Description</b><br/>Section content resulting from reconciliation in the Word document.</p> |
| SectionContent           | <p><b>Type</b><br/>textarea</p> <p><b>Properties</b><br/>Create, Update</p> <p><b>Description</b><br/>Section content in HTML format.</p>   |
| Sequence                 | <p><b>Type</b><br/>int</p> <p><b>Properties</b><br/>Create, Filter, Group, idLookup, Sort, Update</p> <p><b>Description</b><br/>Section's sequence number in the contract document.</p> |
| SignatureContent         | <p><b>Type</b><br/>textarea</p> <p><b>Properties</b><br/>Create, Nillable, Update</p> <p><b>Description</b><br/>DocuSign signature tokens.</p>  |
| SubSequence              | <p><b>Type</b><br/>int</p> <p><b>Properties</b><br/>Create, Filter, Group, idLookup, Nillable, Sort, Update</p>   |

| Field                  | Details  |
|------------------------|--|
|                        | <p><b>Description</b><br/>The sub sequence of the section in the generated web document.</p>   |
| TemplateSectionContent | <p><b>Type</b><br/>textarea</p> <p><b>Properties</b><br/>Create, Nillable, Update</p> <p><b>Description</b><br/>Original section content from the corresponding template section.</p>  |
| TokenList              | <p><b>Type</b><br/>textarea</p> <p><b>Properties</b><br/>Create, Nillable, Update</p> <p><b>Description</b><br/>Tokens in the section that map to Salesforce object fields.</p>  |
| Type                   | <p><b>Type</b><br/>picklist</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b><br/>Indicates section type.<br/>Possible values are:</p> <ul style="list-style-type: none"> <li>• Clause</li> <li>• Context</li> <li>• Custom</li> <li>• EmbeddedTemplate</li> <li>• Image</li> <li>• Item</li> <li>• RepeatingContent</li> <li>• Signature</li> </ul> <p>The default value is 'Context'.</p> |
| XmlContent             | <p><b>Type</b><br/>textarea</p> <p><b>Properties</b><br/>Create, Nillable, Update</p> <p><b>Description</b><br/>Section content in XML format.</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.

### **ContractDocVersionSectionChangeEvent**

Change events are available for the object.

### **ContractDocVersionSectionFeed**

Feed tracking is available for the object.

### **ContractDocVersionSectionHistory**

History is available for tracked fields of the object.

### **ContractDocVersionSectionOwnerSharingRule**

Sharing rules are available for the object.

### **ContractDocVersionSectionShare**

Sharing is available for the object.

## ContractExtractionResult

Represents contract-specific data extracted by the Contracts AI from an uploaded PDF that's ready for review. For example, account name, owner, start date, contract name, contract record type, contract term, and clauses. Before contract record creation, users can access, review, and modify the temporarily stored information. This object is available in API version 60.0 and later.

## Supported Calls

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

## Fields

| Field                  | Details  |
|------------------------|--|
| ContentDocumentId      | <p><b>Type</b><br/>reference</p> <p><b>Properties</b><br/>Create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>The content document associated with the contract.<br/>This field is a relationship field.</p> <p><b>Relationship Name</b><br/>ContentDocument</p> <p><b>Refers To</b><br/>ContentDocument</p> |
| ExtractedClauseContent | <p><b>Type</b><br/>textarea</p>  |

| Field                       | Details  |
|-----------------------------|--|
|                             | <p><b>Properties</b><br/>Create, Nillable, Update</p> <p><b>Description</b><br/>The clauses that are reviewed during the extraction review process.</p>  |
| ExtractedClauseContentDocId | <p><b>Type</b><br/>reference</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>The document containing clauses that exceeds 131K characters and are reviewed during the extraction review process.<br/><br/>This field is a relationship field.</p> <p><b>Relationship Name</b><br/>ExtractedClauseContentDoc</p> <p><b>Refers To</b><br/>ContentDocument</p> |
| ExtractedClauseCount        | <p><b>Type</b><br/>int</p> <p><b>Properties</b><br/>Filter, Group, Nillable, Sort</p> <p><b>Description</b><br/>The number of clauses extracted during the extraction review process.</p>  |
| ExtractedContractDetails    | <p><b>Type</b><br/>textarea</p> <p><b>Properties</b><br/>Create, Nillable, Update</p> <p><b>Description</b><br/>The contract fields that are extracted and reviewed during the extraction review process.</p>  |
| ExtractedContractFieldCount | <p><b>Type</b><br/>int</p> <p><b>Properties</b><br/>Filter, Group, Nillable, Sort</p> <p><b>Description</b><br/>The number of contract fields extracted during the extraction review process.</p>  |
| LastReferencedDate          | <p><b>Type</b><br/>dateTime</p>  |

| Field          | Details  |
|----------------|--|
|                | <p><b>Properties</b><br/>Filter, Nillable, Sort</p> <p><b>Description</b><br/>The timestamp for when the current user last viewed a record related to this record.</p>   |
| LastViewedDate | <p><b>Type</b><br/>dateTime</p> <p><b>Properties</b><br/>Filter, Nillable, Sort</p> <p><b>Description</b><br/>The timestamp for when the current user last viewed this record. If this value is null, this record might only have been referenced (LastReferencedDate) and not viewed.</p>   |
| Name           | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Create, Filter, Group, idLookup, Sort, Update</p> <p><b>Description</b><br/>The name of the contract extraction review.</p>   |
| OwnerId        | <p><b>Type</b><br/>reference</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>ID of the user that owns this record.<br/><br/>This field is a polymorphic relationship field.</p> <p><b>Relationship Name</b><br/>Owner</p> <p><b>Refers To</b><br/>Group, User</p>  |
| Status         | <p><b>Type</b><br/>picklist</p> <p><b>Properties</b><br/>Create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b><br/>Specifies the contract extraction review status.<br/><br/>Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>ExtractionFailed</code>—Extraction Failed</li> <li>• <code>ExtractionInProgress</code>—Extraction In Progress</li> </ul> |

| Field | Details  |
|-------|--|
|       | <ul style="list-style-type: none"> <li>ReviewCompleted—Review Completed</li> <li>ReviewInProgress—Review In Progress</li> <li>ReviewNotStarted—Review Not Started</li> </ul> |

## Associated Objects

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

### ContractExtractionResultChangeEvent

Change events are available for the object.

### ContractExtractionResultFeed

Feed tracking is available for the object.

### ContractExtractionResultHistory

History is available for tracked fields of the object.

### ContractExtractionResultOwnerSharingRule

Sharing rules are available for the object.

### ContractExtractionResultShare

Sharing is available for the object.

## ContractType

A sub type that groups contracts with similar characteristics, such as lifecycle states, permissions, and templates and clauses used. This object is available in API version 56.0 and later.

## Supported Calls

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

## Fields

| Field     | Details  |
|-----------|--|
| Name      | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>Specifies the contract type name.</p> |
| IsDefault | <p><b>Type</b><br/>boolean</p>   |

| Field    | Details   |
|----------|---|
|          | <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>Indicates whether this contract type is a default for the org.<br/>The default value is 'false'.</p>          |
| SubTypes | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p><b>Description</b><br/>List of subtypes for the contract object associated with this contract type.</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.

### ContractTypeChangeEvent

Change events are available for the object.

### ContractTypeFeed

Feed tracking is available for the object.

### ContractTypeHistory

History is available for tracked fields of the object.

### ContractTypeOwnerSharingRule

Sharing rules are available for the object.

### ContractTypeShare

Sharing is available for the object.

## ContractTypeConfig

The settings that define the characteristics and behavior of all contracts of that type. This object is available in API version 56.0 and later.

## Supported Calls

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

## Fields

| Field      | Details  |
|------------|--|
| ConfigType | <p><b>Type</b><br/>picklist</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b><br/>The name of the configuration setting.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>ActivateObligationsBasedOnContractStatus</code>—Activate Obligations Based On Contract Status</li> <li>• <code>Append0ToAutoNbrEmbeddedSect</code>—Append Zero To Auto Number Of Embedded Section</li> <li>• <code>AutoGenDocOnContractCreation</code>—Auto Generate Document On Contract Creation</li> <li>• <code>AutoGenDocOnContractUpdate</code>—Auto Generate Document On Contract Update</li> <li>• <code>AutoGenerateDocFileType</code>—Auto Generate Doc File Type</li> <li>• <code>CheckInDocFileType</code>—Check In Document File Type</li> <li>• <code>CompareContractVersionsEnabled</code>—Compare Contract Versions Enabled</li> <li>• <code>ContractDocumentDownloadOption</code>—Contract Document Download Option</li> <li>• <code>ContractSignatureDeclinedSts</code>—Contract Signature Declined Status</li> <li>• <code>ContractSignatureExpiredStatus</code>—Contract Signature Expired Status</li> <li>• <code>ContractSignatureVoidedStatus</code>—Contract Signature Voided Status</li> <li>• <code>ContractSignedStatus</code>—Contract Signed Status</li> <li>• <code>CreateDocSectionsDocxTemplates</code>—Create Document Sections for Docx Templates</li> <li>• <code>DefaultTemplateName</code>—Default Template Name</li> <li>• <code>DocuSignAccountBrand</code>—DocuSign Account Brand</li> <li>• <code>DocuSignExpireEnabled</code>—DocuSign Expire Enabled</li> <li>• <code>DocuSignExpireWarning</code>—DocuSign Expire Warning</li> <li>• <code>DocuSignExpiresAfter</code>—DocuSign Expires After</li> <li>• <code>DocuSignReminderDelayInDays</code>—DocuSign Reminder Delay In Days</li> <li>• <code>DocuSignReminderEnabled</code>—DocuSign Reminder Enabled</li> <li>• <code>DocuSignReminderFrequency</code>—DocuSign Reminder Frequency</li> <li>• <code>DocuSignUseAccountDefaultNtfcn</code>—DocuSign Use Account Default Notification</li> <li>• <code>DocumentFileNameFormat</code>—Document File Name Format</li> <li>• <code>DocumentTemplateFilterClass</code>—Document Template Filter Class</li> </ul> |

| Field                       | Details  |
|-----------------------------|--|
|                             | <ul style="list-style-type: none"> <li>• <code>EmailNotificationOnDocumentGeneration</code>—Email Notification On Document Generation</li> <li>• <code>ExternalReviewRequired</code>—External Review Required</li> <li>• <code>ImportTargetContractStatus</code>—Import Target Contract Status</li> <li>• <code>InclWordTrackChgReconciliation</code>—Include Word Track Changes In Reconciliation</li> <li>• <code>InclWordTrackChgSectionContent</code>—Include Word Track Changes In Section Content</li> <li>• <code>InternalReviewRequired</code>—Internal Review Required</li> <li>• <code>NotifyDocTemplateVerChgStatus</code>—Notify Document Template Version Change In Status</li> <li>• <code>PrivateExternalReviewCompletionSite</code>—External Private Review Guest Site Name</li> <li>• <code>TrackContractRedlines</code>—Track Contract Redlines</li> <li>• <code>WordTrackChangesDisplayColor</code>—Word Track Changes Display Color</li> </ul> <p>The default value is 'ContractDocumentDownloadOption'.</p> |
| <code>ConfigValue</code>    | <p><b>Type</b><br/>textarea</p> <p><b>Properties</b><br/>Create, Nillable, Update</p> <p><b>Description</b><br/>The value of the configuration setting specified in the Configuration Name field.</p>  |
| <code>ContractTypeId</code> | <p><b>Type</b><br/>reference</p> <p><b>Properties</b><br/>Create, Filter, Group, Sort</p> <p><b>Description</b><br/>The ID of the related Contract Type.<br/>This is a relationship field.</p> <p><b>Relationship Name</b><br/>ContractType</p> <p><b>Relationship Type</b><br/>Lookup</p> <p><b>Refers To</b><br/>ContractType</p>  |
| <code>UsageType</code>      | <p><b>Type</b><br/>picklist</p>  |

| Field | Details   |
|-------|---|
|       | <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b><br/>The usage type to which this setting belongs.<br/>Possible values are:</p> <ul style="list-style-type: none"> <li>• DocumentSetting</li> <li>• Reconciliation</li> <li>• Redlining</li> <li>• SignatureSetting</li> </ul> <p>The default value is 'DocumentSetting'.</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.

### ContractTypeConfigChangeEvent

Change events are available for the object.

### ContractTypeConfigFeed

Feed tracking is available for the object.

### ContractTypeConfigHistory

History is available for tracked fields of the object.

### ContractTypeConfigOwnerSharingRule

Sharing rules are available for the object.

### ContractTypeConfigShare

Sharing is available for the object.

## DocGenerationBatchProcess

Represents a grouping of document generation requests associated with the batch document generation ID. Only one batch document generation request can be processed at a time. To create a new batch document generation record, pause or cancel the current record. 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()`

## Special Access Rules

DocGenerationBatchProcess is available if your org has the DocGen platform license and related addon and user licenses.

## Fields

| Field                  | Details  |
|------------------------|--|
| Category               | <p><b>Type</b><br/>picklist</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>The category/classification of the document generation batch process request.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• Agreements</li> <li>• Proposals</li> <li>• Quotes</li> </ul> |
| CompletionDate         | <p><b>Type</b><br/>dateTime</p> <p><b>Properties</b><br/>Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b><br/>The date when the document generation batch process was completed.</p>   |
| Description            | <p><b>Type</b><br/>textarea</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>The description of the document generation batch process record.</p>  |
| FailedRequestCount     | <p><b>Type</b><br/>int</p> <p><b>Properties</b><br/>Filter, Group, Nillable, Sort</p> <p><b>Description</b><br/>The number of failed document generation requests associated with the document generation batch process.</p>   |
| InProgressRequestCount | <p><b>Type</b><br/>int</p> <p><b>Properties</b><br/>Filter, Group, Nillable, Sort</p>  |

| Field   | Details   |
|---------|---|
|         | <p><b>Description</b></p> <p>The number of in progress document generation requests associated with the document generation batch process.</p>  |
| Name    | <p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p><b>Description</b></p> <p>The autogenerated system name for a document generation batch process record. For example, <code>BatchReq-0001</code>.</p>  |
| OwnerId | <p><b>Type</b></p> <p>reference</p> <p><b>Properties</b></p> <p>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b></p> <p>The ID of the user that owns this record.</p> <p>This field is a polymorphic relationship field.</p> <p><b>Relationship Name</b></p> <p>Owner</p> <p><b>Relationship Type</b></p> <p>Lookup</p> <p><b>Refers To</b></p> <p>Group, User</p>  |
| Status  | <p><b>Type</b></p> <p>picklist</p> <p><b>Properties</b></p> <p>Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b></p> <p>The status of the document generation batch process request.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• Canceled</li> <li>• Completed</li> <li>• InProgress—In Progress</li> <li>• New</li> <li>• Paused</li> </ul> <p>The default value is <code>New</code>.</p> |

| Field                  | Details  |
|------------------------|--|
| SuccessfulRequestCount | <p><b>Type</b><br/>int</p> <p><b>Properties</b><br/>Filter, Group, Nillable, Sort</p> <p><b>Description</b><br/>The number of successful document generation requests associated with the document generation batch process.</p> |
| TotalRequestCount      | <p><b>Type</b><br/>int</p> <p><b>Properties</b><br/>Filter, Group, Nillable, Sort</p> <p><b>Description</b><br/>The total number of document generation requests associated with the document generation batch process.</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.

### **DocGenerationBatchProcessChangeEvent**

Change events are available for the object.

### **DocGenerationBatchProcessFeed**

Feed tracking is available for the object.

### **DocGenerationBatchProcessHistory**

History is available for tracked fields of the object.

### **DocGenerationBatchProcessOwnerSharingRule**

Sharing rules are available for the object.

### **DocGenerationBatchProcessShare**

Sharing is available for the object.

## DocGenBtchStsChgEvent

Represents the change in the status of the batch document generation request. A batch document generation request groups multiple document generation requests by associating the individual requests with a batch document generation ID. This object is available in API version 62.0 and later.

## Supported Calls

`describeSObjects()`

## Fields

| Field                  | Details  |
|------------------------|--|
| BatchProcessIdentifier | <p><b>Type</b><br/>string</p> <p><b>Properties</b></p> <p><b>Description</b><br/>The autogenerated system ID for a document generation batch process request.</p>  |
| Status                 | <p><b>Type</b><br/>picklist</p> <p><b>Properties</b><br/>Defaulted on create, Restricted picklist</p> <p><b>Description</b><br/>Specifies the status of the document generation batch process request. For example, New, In Progress, Completed, Canceled, and Paused.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• Canceled</li> <li>• Completed</li> <li>• InProgress</li> <li>• New</li> <li>• Paused</li> </ul> <p>The default value is New.</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.

### [DocGenBtchStsChgEventChangeEvent](#)

Change events are available for the object.

### [DocGenBtchStsChgEventFeed](#)

Feed tracking is available for the object.

### [DocGenBtchStsChgEventHistory](#)

History is available for tracked fields of the object.

### [DocGenBtchStsChgEventOwnerSharingRule](#)

Sharing rules are available for the object.

### [DocGenBtchStsChgEventShare](#)

Sharing is available for the object.

## DocGenProcStsChgEvent

Represents the change in status of a document generation request. This object is available in API version 62.0 and later.

### Supported Calls

`describeSObjects()`

### Fields

| Field                                | Details  |
|--------------------------------------|--|
| <code>DocGenProcessIdentifier</code> | <p><b>Type</b><br/>string</p> <p><b>Properties</b></p> <p><b>Description</b><br/>The autogenerated system ID for a document generation process request.</p>  |
| <code>Error</code>                   | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Nillable</p> <p><b>Description</b><br/>The details of the exception explaining why the document generation process wasn't completed.</p>  |
| <code>PdfDocumentIdentifier</code>   | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Nillable</p> <p><b>Description</b><br/>The ContentDocumentId of the generated PDF file.</p>   |
| <code>Status</code>                  | <p><b>Type</b><br/>picklist</p> <p><b>Properties</b><br/>Defaulted on create, Restricted picklist</p> <p><b>Description</b><br/>Specifies the status of the document generation process request. For example, In Progress, Failure, Success, and Blocked.<br/><br/>Possible values are:</p> <ul style="list-style-type: none"> <li>• Blocked</li> <li>• Failure</li> <li>• InProgress</li> </ul> |

| Field                  | Details   |
|------------------------|---|
|                        | <ul style="list-style-type: none"> <li>• Success</li> <li>• Waiting</li> </ul> <p>The default value is InProgress.</p>                                    |
| WordDocumentIdentifier | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Nillable</p> <p><b>Description</b><br/>The ContentDocumentId of the generated DOCX file.</p>       |
| ReferenceObject        | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Nillable</p> <p><b>Description</b><br/>The object to which the generated document is attached.</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.

### [DocGenProcStsChgEventChangeEvent](#)

Change events are available for the object.

### [DocGenProcStsChgEventFeed](#)

Feed tracking is available for the object.

### [DocGenProcStsChgEventHistory](#)

History is available for tracked fields of the object.

### [DocGenProcStsChgEventOwnerSharingRule](#)

Sharing rules are available for the object.

### [DocGenProcStsChgEventShare](#)

Sharing is available for the object.

## DocumentAuthoredContent

Represents the metadata of the content within the content boundary of a document such as a template or contract document. You can store metadata details of the marked clauses and sections in Salesforce with the document authored content. This object is available in API version 58.0 and later.

## Supported Calls

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

## Special Access Rules

DocumentAuthoredContent is available if your org has the DocGen platform license and related addon and user licenses.

## Fields

| Field                   | Details   |
|-------------------------|---|
| Checksum                | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>The number of bits for the document authored content. Use the checksum to detect content changes.</p>  |
| Content                 | <p><b>Type</b><br/>textarea</p> <p><b>Properties</b><br/>Create, Nillable, Update</p> <p><b>Description</b><br/>The text marked as a document authored content, such as clause content, or section content.</p>   |
| ContentGenerationSource | <p><b>Type</b><br/>picklist</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b><br/>The source of content creation.<br/>Possible values are:</p> <ul style="list-style-type: none"> <li>• GenAIDrafted—Gen AI Drafted</li> <li>• GenAIExtracted—Gen AI Extracted</li> <li>• MarkedContent—Marked Content</li> <li>• StandardContent—Standard Content</li> </ul> |
| ContentType             | <p><b>Type</b><br/>picklist</p> <p><b>Properties</b><br/>Create, Filter, Group, Restricted picklist, Sort, Update</p>   |

| Field                                     | Details  |
|---|--|
|   | <p><b>Description</b></p> <p>The document authored content type associated with the Reference Object. For example, Document Clause, Document Section.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>DocumentAuthoredClause</code>—Document Authored Clause</li> <li>• <code>DocumentAuthoredSection</code>—Document Authored Section</li> <li>• <code>StandardDocumentClause</code>—Standard Document Clause</li> </ul> |
| <code>DocAuthoredContentIdentifier</code> | <p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b></p> <p>The unique reference ID (128-bit text string) that's created at the document level and used to identify the document authored content.</p>   |
| <code>IsLibraryAdditionRequested</code>   | <p><b>Type</b></p> <p>boolean</p> <p><b>Properties</b></p> <p>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b></p> <p>Specifies if the promotion request is raised for the Document Authored Content</p> <p>The default value is <code>false</code>.</p>   |
| <code>IsReviewed</code>                   | <p><b>Type</b></p> <p>boolean</p> <p><b>Properties</b></p> <p>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b></p> <p>Specifies if the Document Authored Content is reviewed</p> <p>The default value is <code>false</code>.</p>   |
| <code>Name</code>                         | <p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p><b>Description</b></p> <p>The name of the document authored content.</p>   |
| <code>ParentContentId</code>              | <p><b>Type</b></p> <p>reference</p>  |

| Field                     | Details  |
|---------------------------|--|
|                           | <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>The ID of parent content associated with the document authored content. For example, the ID of the section that contains clauses.<br/><br/>This field is a relationship field.</p> <p><b>Relationship Name</b><br/>ParentContent</p> <p><b>Relationship Type</b><br/>Lookup</p> <p><b>Refers To</b><br/>DocumentAuthoredContent</p>                           |
| ReferenceObjectId         | <p><b>Type</b><br/>reference</p> <p><b>Properties</b><br/>Create, Filter, Group, Sort</p> <p><b>Description</b><br/>The object associated with the document authored content.<br/><br/>This field is a polymorphic relationship field.</p> <p><b>Relationship Name</b><br/>ReferenceObject</p> <p><b>Relationship Type</b><br/>Lookup</p> <p><b>Refers To</b><br/>ContractDocumentVersion, DocumentTemplate</p>  |
| ReferenceObjectRecordType | <p><b>Type</b><br/>picklist</p> <p><b>Properties</b><br/>Create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b><br/>The record type of the Reference Object. For example Contract Document Version, Document Template.<br/><br/>Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>ContractDocumentVersion</code>—Contract Document Version</li> <li>• <code>DocumentTemplate</code>—Document Template</li> </ul> |
| StandardContentObjectId   | <p><b>Type</b><br/>reference</p>   |

| Field                     | Details   |
|---------------------------|---|
|                           | <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>The ID of the standard Salesforce content associated with the document authored content.<br/>This field is a relationship field.</p> <p><b>Relationship Name</b><br/>StandardContentObject</p> <p><b>Relationship Type</b><br/>Lookup</p> <p><b>Refers To</b><br/>DocumentClause</p> |
| StandardContentObjectType | <p><b>Type</b><br/>picklist</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b><br/>Specifies the standard Salesforce content associated with the document authored content, such as Document Clause.<br/>Possible values are:</p> <ul style="list-style-type: none"> <li>DocumentClause—Document Clause</li> </ul> |

## Associated Objects

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

### [DocumentAuthoredContentChangeEvent](#)

Change events are available for the object.

### [DocumentAuthoredContentFeed](#)

Feed tracking is available for the object.

### [DocumentAuthoredContentHistory](#)

History is available for tracked fields of the object.

### [DocumentAuthoredContentOwnerSharingRule](#)

Sharing rules are available for the object.

### [DocumentAuthoredContentShare](#)

Sharing is available for the object.

## DocumentClause

Represents a clause that can be associated with multiple documents.

## Supported Calls

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

## Special Access Rules

DocumentClause is available for users with the ClauseManagement user permission set licenses. Salesforce Org must have a ClauseManagement platform license to access this object.

## Fields

| Field               | Details  |
|---------------------|--|
| Content             | <p><b>Type</b><br/>textarea</p> <p><b>Properties</b><br/>Create, Nillable, Update</p> <p><b>Description</b><br/>Represents the HTML content of the document clause.</p>  |
| Description         | <p><b>Type</b><br/>textarea</p> <p><b>Properties</b><br/>Create, Nillable, Update</p> <p><b>Description</b><br/>Represents the summary of the document clause.</p>   |
| DocumentClauseSetId | <p><b>Type</b><br/>reference</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>Represents the ID of Document Clause Group associated with Document Clause.<br/>This field is a relationship field.</p> <p><b>Relationship Name</b><br/>DocumentClauseSet</p> <p><b>Relationship Type</b><br/>Lookup</p> <p><b>Refers To</b><br/>DocumentClauseSet</p> |
| Format              | <p><b>Type</b><br/>picklist</p>  |

| Field             | Details  |
|-------------------|--|
|                   | <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b><br/>Specifies the format for the clause such as Rich Text.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>Non_Formatted</code>—Non Formatted</li> <li>• <code>Rich_Text</code>—Rich Text</li> </ul> <p>The default value is <code>Non_Formatted</code>.</p>   |
| IsAlternateClause | <p><b>Type</b><br/>boolean</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>Indicates whether the Document Clause is main or alternate.</p> <p>The default value is false.</p>  |
| Language          | <p><b>Type</b><br/>picklist</p> <p><b>Properties</b><br/>Create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b><br/>Specifies the language of the document clause.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>da</code>—Danish</li> <li>• <code>de</code>—German</li> <li>• <code>en_US</code>—English</li> <li>• <code>es</code>—Spanish</li> <li>• <code>es_MX</code>—Spanish (Mexico)</li> <li>• <code>fi</code>—Finnish</li> <li>• <code>fr</code>—French</li> <li>• <code>it</code>—Italian</li> <li>• <code>ja</code>—Japanese</li> <li>• <code>ko</code>—Korean</li> <li>• <code>nl_NL</code>—Dutch</li> <li>• <code>no</code>—Norwegian</li> <li>• <code>pt_BR</code>—Portuguese (Brazil)</li> <li>• <code>ru</code>—Russian</li> <li>• <code>sv</code>—Swedish</li> </ul> |

| Field              | Details   |
|--------------------|---|
|                    | <ul style="list-style-type: none"> <li>• th—Thai</li> <li>• zh_CN—Chinese (Simplified)</li> <li>• zh_TW—Chinese (Traditional)</li> </ul>  |
| LastReferencedDate | <p><b>Type</b><br/>dateTime</p> <p><b>Properties</b><br/>Filter, Nillable, Sort</p> <p><b>Description</b><br/>The timestamp for when the current user last viewed a record related to this record.</p>  |
| LastViewedDate     | <p><b>Type</b><br/>dateTime</p> <p><b>Properties</b><br/>Filter, Nillable, Sort</p> <p><b>Description</b><br/>The timestamp for when the current user last viewed this record. If this value is null, this record might only have been referenced (LastReferencedDate) and not viewed.</p>  |
| Name               | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Create, Filter, Group, idLookup, Sort, Update</p> <p><b>Description</b><br/>Specifies the name of the document template clause.</p>  |
| OwnerId            | <p><b>Type</b><br/>reference</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>ID of the user that owns this record.<br/><br/>This field is a polymorphic relationship field.</p> <p><b>Relationship Name</b><br/>Owner</p> <p><b>Refers To</b><br/>Group, User</p> |
| Status             | <p><b>Type</b><br/>picklist</p>   |

| Field   | Details   |
|---------|---|
|         | <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b><br/>Specifies the status of the clause such as Draft, Active, Archived.<br/>Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>AI_Drafted</code>—This value is available in API version 60.0 and later.</li> <li>• <code>Active</code></li> <li>• <code>Archived</code></li> <li>• <code>Draft</code></li> <li>• <code>In_Approval</code></li> <li>• <code>Review_Requested</code></li> </ul> <p>The default value is <code>Draft</code>.</p> |
| Version | <p><b>Type</b><br/>int</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>The version number of the document clause.</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.

### [DocumentClauseChangeEvent](#)

Change events are available for the object.

### [DocumentClauseFeed](#)

Feed tracking is available for the object.

### [DocumentClauseHistory](#)

History is available for tracked fields of the object.

### [DocumentClauseOwnerSharingRule](#)

Sharing rules are available for the object.

### [DocumentClauseShare](#)

Sharing is available for the object.

## DocumentClauseSet

Represents a grouping for clauses, which can hold multiple variations of the same clause such as main clause and alternate pre-approved clauses based on language.

## Supported Calls

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

## Special Access Rules

DocumentClauseSet is available for users with the ClauseManagement user permission set licenses. Salesforce Org must have a ClauseManagement platform license to access this object.

## Fields

| Field               | Details   |
|---------------------|---|
| Category            | <p><b>Type</b><br/>picklist</p> <p><b>Properties</b><br/>Create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b><br/>Specifies the category of the clause set.<br/>Possible values are:</p> <ul style="list-style-type: none"> <li>0zMRO000000003P—Test</li> </ul>   |
| CategoryReferenceId | <p><b>Type</b><br/>reference</p> <p><b>Properties</b><br/>Filter, Group, Nillable, Sort</p> <p><b>Description</b><br/>This field is used for validating category values.<br/>This field is a relationship field.</p> <p><b>Relationship Name</b><br/>CategoryReference</p> <p><b>Relationship Type</b><br/>Lookup</p> <p><b>Refers To</b><br/>ClauseCatgConfiguration</p> |
| DefaultLanguage     | <p><b>Type</b><br/>picklist</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b><br/>Specifies the default language of the clause set.<br/>Possible values are:</p>   |

| Field  | Details  |
|--------|--|
|        | <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> |
| Name   | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Create, Filter, Group, idLookup, Sort, Update</p> <p><b>Description</b><br/>The name of the clause set.</p>   |
| Status | <p><b>Type</b><br/>picklist</p> <p><b>Properties</b><br/>Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b><br/>Specifies the status of the clause set.<br/>Possible values are:</p> <ul style="list-style-type: none"> <li>• Active</li> <li>• Archived</li> <li>• Draft</li> </ul> <p>The default value is <code>Draft</code>.</p>  |

## Associated Objects

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

### DocumentClauseSetChangeEvent

Change events are available for the object.

### DocumentClauseSetFeed

Feed tracking is available for the object.

### DocumentClauseSetHistory

History is available for tracked fields of the object.

### DocumentClauseSetOwnerSharingRule

Sharing rules are available for the object.

### DocumentClauseSetShare

Sharing is available for the object.

## DocumentEnvelope

The container for a document that is routed for signatures. This object is available in API version 56.0 and later.

## Supported Calls

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

## Fields

| Field                     | Details   |
|---------------------------|---|
| ContractDocumentVersionId | <p><b>Type</b><br/>reference</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>The ID of the Contract for the Contract Document Version to which this Document Envelope belongs.<br/><br/>This is a relationship field.</p> <p><b>Relationship Name</b><br/>ContractDocumentVersion</p> <p><b>Relationship Type</b><br/>Lookup</p> <p><b>Refers To</b><br/>ContractDocumentVersion</p> |

| Field                  | Details   |
|------------------------|---|
| DeliveredDateTime      | <p><b>Type</b><br/>dateTime</p> <p><b>Properties</b><br/>Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b><br/>The timestamp at which the document was most recently viewed by all recipients.</p> |
| EnvelopeIdentifier     | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p><b>Description</b><br/>The identifier of this Document Envelope.</p>                        |
| EnvelopeMessageContent | <p><b>Type</b><br/>textarea</p> <p><b>Properties</b><br/>Create, Nillable, Update</p> <p><b>Description</b><br/>The body of the email sent to the recipient.</p>  |
| EnvelopeSubject        | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b><br/>The subject of the email sent to the recipient.</p>                                   |
| EnvelopeUri            | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>The URI of this Document Envelope.</p>   |
| FinalStatusDateTime    | <p><b>Type</b><br/>dateTime</p> <p><b>Properties</b><br/>Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b><br/>The time-stamp at which this Document Envelope was completed.</p>                   |

| Field             | Details   |
|-------------------|---|
| FinalStatusReason | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b><br/>The final status reason of this Document Envelope.</p>  |
| Name              | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Create, Filter, Group, idLookup, Sort, Update</p> <p><b>Description</b><br/>The name of this Document Envelope.</p>  |
| ReferenceObjectId | <p><b>Type</b><br/>reference</p> <p><b>Properties</b><br/>Create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>The ID of the object associated with this Document Envelope.<br/>This is a polymorphic relationship field.</p> <p><b>Relationship Name</b><br/>ReferenceObject</p> <p><b>Relationship Type</b><br/>Lookup</p> |
| Status            | <p><b>Type</b><br/>picklist</p> <p><b>Properties</b><br/>Create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>The status of this Document Envelope.<br/>Possible values are:</p> <ul style="list-style-type: none"><li>• Sent</li><li>• Delivered</li><li>• Declined</li><li>• Voided</li><li>• Completed</li></ul>          |

| Field                | Details   |
|----------------------|---|
| StatusChangeDateTime | <p><b>Type</b><br/>dateTime</p> <p><b>Properties</b><br/>Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b><br/>The most recent timestamp at which the Status of this Document Envelope was updated.</p>      |
| Vendor               | <p><b>Type</b><br/>picklist</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b><br/>The name of the online signature vendor.</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.

### [DocumentEnvelopeChangeEvent](#)

Change events are available for the object.

### [DocumentEnvelopeFeed](#)

Feed tracking is available for the object.

### [DocumentEnvelopeHistory](#)

History is available for tracked fields of the object.

### [DocumentEnvelopeOwnerSharingRule](#)

Sharing rules are available for the object.

### [DocumentEnvelopeShare](#)

Sharing is available for the object.

## DocumentGenerationProcess

Supports server-side document generation requests and responses. This object is available in API version 56.0 and later.

## Supported Calls

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

## Fields

| Field                     | Details  |
|---------------------------|--|
| AdditionalMetadata        | <p><b>Type</b><br/>textarea</p> <p><b>Properties</b><br/>Create, Nillable, Update</p> <p><b>Description</b><br/>Stores metadata for dynamic images used during document generation. Available in API version 66.0 and later.</p>   |
| DataRaptorInput           | <p><b>Type</b><br/>textarea</p> <p><b>Properties</b><br/>Create, Nillable, Update</p> <p><b>Description</b><br/>Any additional input required for document generation, such as object ID, JSON, or a string.</p>   |
| DocGenAdditionalInput     | <p><b>Type</b><br/>textarea</p> <p><b>Properties</b><br/><b>Create, Nillable, Update</b></p> <p><b>Description</b><br/>For internal use only.</p>  |
| DocGenAdditionalInputType | <p><b>Type</b><br/>picklist</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b><br/>For internal use only.</p>   |
| DocGenApiVersionType      | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>Specifies the API version to use for document generation. Possible values include <code>Basic</code> and <code>Advanced</code>. The default value is <code>Basic</code>.<br/><br/>Available in API version 62.0</p> |

| Field                 | Details  |
|-----------------------|--|
| DocumentTemplateId    | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p><b>Description</b><br/>ID of the document template for operations like cloning or creating a new version.<br/>Available in API version 62.0.</p>   |
| EstimatedDocumentSize | <p><b>Type</b><br/>int</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>For internal use only.</p>   |
| DocumentInputType     | <p><b>Type</b><br/>picklist</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b><br/>The input type of the document.<br/>Possible values are:</p> <ul style="list-style-type: none"> <li>• DocumentTemplate—Document Template</li> <li>• None</li> </ul> <p>The default value is None.</p> |
| Name                  | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Autonumber, Defaulted on create, Filter, idLookup, Sort</p> <p><b>Description</b><br/>Represents an automatically generated system name. Example: Request-001.</p>  |
| HasDocGenFontSource   | <p><b>Type</b><br/>boolean</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>Indicates whether the document template font (true) or a rich text editor font (false) is used for rendering values during document generation.</p>   |

| Field                              | Details  |
|------------------------------------|--|
|                                    | The default value is <code>false</code> .  |
| <code>IsSharedExternally</code>    | <p><b>Type</b><br/>boolean</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>Indicates whether the document is shared with external users (<code>true</code>) or not (<code>false</code>).<br/>The default value is <code>false</code>. Available in API version 66.0 and later.</p> |
| <code>LastReferencedDate</code>    | <p><b>Type</b><br/>dateTime</p> <p><b>Properties</b><br/>Filter, Nillable, Sort</p> <p><b>Description</b><br/>The timestamp for when the current user last viewed a record related to this record.</p>   |
| <code>LastViewedDate</code>        | <p><b>Type</b><br/>dateTime</p> <p><b>Properties</b><br/>Filter, Nillable, Sort</p> <p><b>Description</b><br/>The timestamp for when the current user last viewed this record. If this value is null, this record might only have been referenced (<code>LastReferencedDate</code>) and not viewed.</p>  |
| <code>OwnerId</code>               | <p><b>Type</b><br/>reference</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>ID of the user that owns this record.<br/>This field is a polymorphic relationship field.</p> <p><b>Relationship Name</b><br/>Owner</p> <p><b>Refers To</b><br/>Group, User</p>                       |
| <code>PdfDocIdentifiersList</code> | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p>   |

| Field           | Details  |
|-----------------|--|
|                 | <p><b>Description</b></p> <p>The PDF document IDs of the contract documents to be converted into a single .pdf file. You can combine upto ten PDFs into a single file.</p> <p>Make sure the content version ID for each PDF file is 18 characters long.</p> <p>Available in API version 63.0 and later.</p>  |
| ReferenceObject | <p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p><b>Description</b></p> <p>Refers to the object to which generated document is attached.</p>  |
| RequestText     | <p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b></p> <p>Requests parameters that are passed in the payload.</p>  |
| ResponseText    | <p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b></p> <p>Requests parameters that are passed in the payload.</p>  |
| SourceObjectId  | <p><b>Type</b></p> <p>reference</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b></p> <p>Specifies the object from which the document generation request is created. For example, Contract Document Version.</p> <p>This field is a polymorphic relationship field.</p> <p><b>Relationship Name</b></p> <p>SourceObject</p> <p><b>Relationship Type</b></p> <p>Lookup</p> <p><b>Refers To</b></p> <p>ContractDocumentVersion</p> |

| Field                        | Details  |
|------------------------------|--|
| Status                       | <p><b>Type</b><br/>picklist</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b><br/>Contains the status of the request.<br/>Possible values are:</p> <ul style="list-style-type: none"> <li>• Failure</li> <li>• Success</li> <li>• InProgress</li> </ul> <p>The default value is InProgress.</p>   |
| TokenData                    | <p><b>Type</b><br/>textarea</p> <p><b>Properties</b><br/>Create, Nillable, Update</p> <p><b>Description</b><br/>Contains JSON data with information that users enter in the new, generated document.</p>   |
| TokenDataContent<br>Document | <p><b>Type</b><br/>reference</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort</p> <p><b>Description</b><br/>The Token Data Content Document associated with the Document Generation Process.<br/>Contains information that users enter in the new generated document.</p>  |
| Type                         | <p><b>Type</b><br/>picklist</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b><br/>Type of service requested for the document for generating and converting to PDF.<br/>Possible values are:</p> <ul style="list-style-type: none"> <li>• Generate</li> <li>• Convert</li> <li>• GenerateAndConvert</li> <li>• MergePDF</li> </ul> <p>The default value is Generate.</p> |

## DocumentGenerationSetting

Represents an org's settings for automatic document generation from templates. This object is available in API version 54.0 and later.

### Supported Calls

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

### Special Access Rules

DocumentGenerationSetting is available if your org has the DocGen platform license and related addon and user licenses.

### Fields

| Field                       | Details  |
|-----------------------------|--|
| BatchDocGnrnPctLimitPerHour | <p><b>Type</b><br/>percent</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Nillable, Sort, Update</p> <p><b>Description</b><br/>The maximum percentage of hourly server-side document generation requests used for batch processing.<br/><br/>Available in version 58.0 and later.</p>   |
| DeveloperName               | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>Required. The unique name of the object in the API. This name can contain only underscores and alphanumeric characters and must be unique in your organization. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.</p> |
| DocumentTemplateLibraryName | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>The name of the library associated with the document template.</p>   |
| GenerationMechanism         | <p><b>Type</b><br/>picklist</p>  |

| Field                                   | Details  |
|---|--|
|   | <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b><br/>The location where the web document is generated.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>ClientSide</code>—Client-Side</li> <li>• <code>ServerSide</code>—Server-Side</li> </ul> <p>The default value is <code>ClientSide</code>.</p> |
| <code>GuestAccessNamedCredential</code> | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>The named credential that lets guest users generate documents.</p>  |
| <code>InProgDocGenRqstTmot</code>       | <p><b>Type</b><br/>int</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>The time interval (in hours) after which InProgress DocumentGenerationProcess records (single point or batch request) are terminated and the request status is updated to Failed. Specify a valid whole number between 1 and 24. The default value is set to 6.</p>                          |
| <code>IsBatchDocGnrnEnabled</code>      | <p><b>Type</b><br/>boolean</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>Indicates whether server-side document generation requests are queued and processed within the hourly batch document generation limit.</p> <p>The default value is <code>false</code>.</p> <p>Available in version 58.0 and later.</p>  |
| <code>IsInProgRqstTmotEnab</code>       | <p><b>Type</b><br/>boolean</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Sort, Update</p>   |

| Field                     | Details   |
|---------------------------|---|
|                           | <p><b>Description</b></p> <p>Indicates whether the InProgress DocGen Request Time Out (hrs) is enabled (true) or not (false).</p> <p>The default value is <code>false</code>.</p>   |
| IsServerSideDocGenEnabled | <p><b>Type</b></p> <p>boolean</p> <p><b>Properties</b></p> <p>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b></p> <p>Indicates whether side server document generation is enabled <code>true</code> or not <code>false</code> for this org.</p> <p>The default value is <code>false</code>.</p>  |
| Language                  | <p><b>Type</b></p> <p>picklist</p> <p><b>Properties</b></p> <p>Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b></p> <p>The language of the label in the user interface.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>da</code>—Danish</li> <li>• <code>de</code>—German</li> <li>• <code>en_US</code>—English</li> <li>• <code>es</code>—Spanish</li> <li>• <code>es_MX</code>—Spanish (Mexico)</li> <li>• <code>fi</code>—Finnish</li> <li>• <code>fr</code>—French</li> <li>• <code>it</code>—Italian</li> <li>• <code>ja</code>—Japanese</li> <li>• <code>ko</code>—Korean</li> <li>• <code>nl_NL</code>—Dutch</li> <li>• <code>no</code>—Norwegian</li> <li>• <code>pt_BR</code>—Portuguese (Brazil)</li> <li>• <code>ru</code>—Russian</li> <li>• <code>sv</code>—Swedish</li> <li>• <code>th</code>—Thai</li> <li>• <code>zh_CN</code>—Chinese (Simplified)</li> <li>• <code>zh_TW</code>—Chinese (Traditional)</li> </ul> |

| Field           | Details   |
|-----------------|---|
| MasterLabel     | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>The user interface label for document generation setting.</p>  |
| NamespacePrefix | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Filter, Group, Nillable, Sort</p> <p><b>Description</b><br/>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><i>namespacePrefix__componentName</i></b> notation.</p> <p>The namespace prefix can have one of the following values.</p> <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> |
| PreviewType     | <p><b>Type</b><br/>picklist</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b><br/>The type of viewer that's used to view the generated web document.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>PDF</li> <li>Thumbnail</li> </ul> <p>The default value is PDF.</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.

**DocumentGenerationSettingChangeEvent**

Change events are available for the object.

**DocumentGenerationSettingFeed**

Feed tracking is available for the object.

**DocumentGenerationSettingHistory**

History is available for tracked fields of the object.

**DocumentGenerationSettingOwnerSharingRule**

Sharing rules are available for the object.

**DocumentGenerationSettingShare**

Sharing is available for the object.

## DocumentTemplate

Represents information about dynamic document generation. This object is available in API version 56.0 and later.

### Supported Calls

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

### Fields

| Field                 | Details  |
|-----------------------|--|
| ContextDefinitionName | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>The name of the context definition that contains the mapping details used for extraction in the Context Service token mapping type.</p> |
| ContextMappingName    | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>The name of the context mapping used for extraction in the Context Service token mapping type.</p>                                      |
| CustomClassName       | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p>   |

| Field                          | Details  |
|--------------------------------|--|
|                                | <p><b>Description</b></p> <p>The name of the custom class that provides token values required by the template for document generation.</p>   |
| DefaultFontStyle               | <p><b>Type</b></p> <p>textarea</p> <p><b>Properties</b></p> <p>Create, Nillable, Update</p> <p><b>Description</b></p> <p>The default font style for a web document template.</p>   |
| DocumentConversionResourceName | <p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b></p> <p>The name of the resource containing the Microsoft Word document file used to generate the output web document.</p>   |
| DocumentGenerationMechanism    | <p><b>Type</b></p> <p>picklist</p> <p><b>Properties</b></p> <p>Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b></p> <p>Specifies the method for generating the document.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• ClientSide</li> <li>• ServerSide</li> </ul> <p>The default value is ClientSide.</p> |
| ExtractOmniDataTransformName   | <p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b></p> <p>The name of the OmniDataTransform bundle of the extract type.</p>  |
| GlobalKey                      | <p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Create, Filter, Group, idLookup, Nillable, Sort, Update</p>   |

| Field                       | Details  |
|-----------------------------|--|
|                             | <p><b>Description</b></p> <p>The unique ID used when migrating the document template between Salesforce orgs. This field is specifically used for import and export operations in managed packages.</p>  |
| HasBatchableSection         | <p><b>Type</b></p> <p>boolean</p> <p><b>Properties</b></p> <p>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b></p> <p>Indicates whether the template has one or more batchable sections.</p> <p>The default value is <code>false</code>.</p>                       |
| IsActive                    | <p><b>Type</b></p> <p>boolean</p> <p><b>Properties</b></p> <p>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b></p> <p>Indicates whether the document template is active.</p> <p>The default value is <code>false</code>.</p>                                       |
| IsSectionProcessed          | <p><b>Type</b></p> <p>boolean</p> <p><b>Properties</b></p> <p>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b></p> <p>Indicates whether the contract boundary sections of the document template are processed.</p> <p>The default value is <code>false</code>.</p> |
| LastEmbeddedTplSectionKey   | <p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b></p> <p>The last auto generated key of the embedded template section.</p>  |
| MapperOmniDataTransformName | <p><b>Type</b></p> <p>string</p> <p><b>Properties</b></p> <p>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b></p> <p>The name of the OmniDataTransform bundle of the mapper type.</p>   |

| Field        | Details   |
|--------------|---|
| Name         | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Create, Filter, Group, idLookup, Sort, Update</p> <p><b>Description</b><br/>The name of the document template.</p>   |
| Namespace    | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>Indicates whether the document template was exported using the industry-specific templates datapack (namespace prefix), or a user manually created or cloned an exported document template (blank). The namespace prefix is associated with the industry license. For example, <code>insurance_fsc_ise</code>.</p> |
| OwnerId      | <p><b>Type</b><br/>reference</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>The ID of the document template.<br/>This field is a polymorphic relationship field.</p> <p><b>Relationship Name</b><br/>Owner</p> <p><b>Relationship Type</b><br/>Lookup</p> <p><b>Refers To</b><br/>Group, User</p>  |
| RecordTypeId | <p><b>Type</b><br/>reference</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>ID of the record type associated with this object.<br/>This field is a relationship field.</p> <p><b>Relationship Name</b><br/>RecordType</p>   |

| Field                          | Details  |
|--------------------------------|--|
|                                | <p><b>Relationship Type</b><br/>Lookup</p> <p><b>Refers To</b><br/>RecordType</p>  |
| SectionHeaderFontStyle         | <p><b>Type</b><br/>textarea</p> <p><b>Properties</b><br/>Create, Nillable, Update</p> <p><b>Description</b><br/>The field to select font style for the section header of the web document template.</p>  |
| SectionHeaderFontStyleValue    | <p><b>Type</b><br/>textarea</p> <p><b>Properties</b><br/>Create, Nillable, Update</p> <p><b>Description</b><br/>The value of the font style selected for the section header of the web document template.</p>  |
| ShouldDisplayUnmappedToken     | <p><b>Type</b><br/>boolean</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>Indicates whether the tokens without runtime values must be displayed.<br/>The default value is <code>false</code>.</p>   |
| ShouldExtractEmbeddedImplToken | <p><b>Type</b><br/>boolean</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>Indicates whether tokens from all the templates embedded within the document template must be extracted. If this field's value is yes, the embedded template tokens are extracted into the mapping omnidatatransform associated with the template.<br/>The default value is <code>false</code>.</p> |
| Status                         | <p><b>Type</b><br/>picklist</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p>  |

| Field                  | Details   |
|------------------------|---|
|                        | <p><b>Description</b><br/>Specifies the status of the document template.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• Active</li> <li>• Archived</li> <li>• Draft</li> </ul>  |
| TargetTokenItemObject  | <p><b>Type</b><br/>multipicklist</p> <p><b>Properties</b><br/>Create, Filter, Nillable, Update</p> <p><b>Description</b><br/>The line item object of the target token object associated with the document template, that's used for mapping tokens.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• OpportunityLineItem</li> <li>• OrderLineItem</li> <li>• QuoteLineItem</li> </ul> |
| TargetTokenObject      | <p><b>Type</b><br/>multipicklist</p> <p><b>Properties</b><br/>Create, Filter, Nillable, Update</p> <p><b>Description</b><br/>The object associated with the document template that's used for mapping tokens.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• Contract</li> <li>• Opportunity</li> <li>• Order</li> <li>• Quote</li> </ul>   |
| TokenList              | <p><b>Type</b><br/>textarea</p> <p><b>Properties</b><br/>Create, Nillable, Update</p> <p><b>Description</b><br/>The list of tokens used to define a section condition.</p>  |
| TokenMappingMethodType | <p><b>Type</b><br/>picklist</p>   |

| Field            | Details   |
|------------------|---|
|                  | <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b><br/>Specifies the processing method for the data which can come from same source object.<br/>Possible values are:</p> <ul style="list-style-type: none"> <li>• CustomClass</li> <li>• OmniDataTransform</li> </ul>                          |
| TokenMappingType | <p><b>Type</b><br/>picklist</p> <p><b>Properties</b><br/>Create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b><br/>Specifies the mapping type for tokens of the document template.<br/>Possible values are:</p> <ul style="list-style-type: none"> <li>• JSON</li> <li>• SalesforceObject</li> </ul>                                 |
| Type             | <p><b>Type</b><br/>picklist</p> <p><b>Properties</b><br/>Create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b><br/>Specifies the type of document template.<br/>Possible values are:</p> <ul style="list-style-type: none"> <li>• Web</li> <li>• MicrosoftWord</li> <li>• Microsoft365Word</li> <li>• MicrosoftPowerpoint</li> </ul> |
| UniqueName       | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>The unique name for the document template.</p>   |
| UsageType        | <p><b>Type</b><br/>picklist</p>   |

| Field                   | Details  |
|-------------------------|--|
|                         | <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b><br/>Specifies the document template usage. For example, the Contract Lifecycle Management option allows you to use the document template only for contract document generation.<br/><br/>The default value is <code>Contract_Lifecycle_Management</code>.</p> |
| VersionNumber           | <p><b>Type</b><br/>int</p> <p><b>Properties</b><br/>Create, Filter, Group, idLookup, Nillable, Sort, Update</p> <p><b>Description</b><br/>The version number of the document template.</p>   |
| XmlRelationshipMetadata | <p><b>Type</b><br/>textarea</p> <p><b>Properties</b><br/>Create, Nillable, Update</p> <p><b>Description</b><br/>The WML relationship metadata used to process Microsoft Word documents.</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.

### DocumentTemplateChangeEvent

Change events are available for the object.

### DocumentTemplateFeed

Feed tracking is available for the object.

### DocumentTemplateHistory

History is available for tracked fields of the object.

### DocumentTemplateOwnerSharingRule

Sharing rules are available for the object.

### DocumentTemplateShare

Sharing is available for the object.

## DocumentTemplateConfig

Represents the shadow object that supports migration of document templates between environments. The Developer field in the shadow object references the UniqueName field in the document template object and is used to retrieve the document template details. For internal use only. This object is available in API version 58.0 and later.

## Supported Calls

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

## Fields

| Field         | Details  |
|---------------|--|
| DeveloperName | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>Required. The unique name of the object in the API. This name can contain only underscores and alphanumeric characters and must be unique in your organization. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.</p>   |
| Language      | <p><b>Type</b><br/>picklist</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b><br/>The language of the label in the user interface.<br/>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> </ul> |

| Field           | Details  |
|-----------------|--|
|                 | <ul style="list-style-type: none"> <li>zh_TW—Chinese (Traditional)</li> </ul>  |
| NamespacePrefix | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Filter, Group, Nillable, Sort</p> <p><b>Description</b><br/>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.</p> <p>The namespace prefix can have one of the following values.</p> <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> |
| MasterLabel     | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>Required The user interface label for the document template config.</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.

### [DocumentTemplateConfigChangeEvent](#)

Change events are available for the object.

### [DocumentTemplateConfigFeed](#)

Feed tracking is available for the object.

### [DocumentTemplateConfigHistory](#)

History is available for tracked fields of the object.

### [DocumentTemplateConfigOwnerSharingRule](#)

Sharing rules are available for the object.

### [DocumentTemplateConfigShare](#)

Sharing is available for the object.

## DocumentTemplateSection

Represents a section in a document template. A document template section can be a clause, image, context, embedded template, or signature. This object is available in API version 52.0 and later.

### Supported Calls

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

### Special Access Rules

DocumentTemplateSection is available if your org has the DocGen platform license and related addon and user licenses.

### Fields

| Field                      | Details   |
|----------------------------|---|
| AccessType                 | <p><b>Type</b><br/>picklist</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b><br/>The type of access for the section in a generated document.<br/>Possible values are:</p> <ul style="list-style-type: none"> <li>• Editable</li> <li>• ReadOnly—Read Only</li> </ul> <p>The default value is <code>Editable</code>.</p> |
| DisplayConditionExpression | <p><b>Type</b><br/>textarea</p> <p><b>Properties</b><br/>Create, Nillable, Update</p> <p><b>Description</b><br/>The condition that controls the display of a section in the document template.</p>  |
| DocumentTemplateClauseId   | <p><b>Type</b><br/>reference</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>The ID of the document template clause association with the section.<br/>This field is a relationship field.</p>  |

| Field                      | Details  |
|----------------------------|--|
|                            | <p><b>Relationship Name</b><br/>DocumentTemplateClause</p> <p><b>Relationship Type</b><br/>Lookup</p> <p><b>Refers To</b><br/>DocumentClause</p>   |
| DocumentTemplateId         | <p><b>Type</b><br/>reference</p> <p><b>Properties</b><br/>Create, Filter, Group, Sort</p> <p><b>Description</b><br/>The ID of the document template associated with the section.<br/>This field is a relationship field.</p> <p><b>Relationship Name</b><br/>DocumentTemplate</p> <p><b>Relationship Type</b><br/>Lookup</p> <p><b>Refers To</b><br/>DocumentTemplate</p>                                    |
| EmbeddedDocumentTemplateId | <p><b>Type</b><br/>reference</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>The ID of the embedded document template associated with the section.<br/>This field is a relationship field.</p> <p><b>Relationship Name</b><br/>EmbeddedDocumentTemplate</p> <p><b>Relationship Type</b><br/>Lookup</p> <p><b>Refers To</b><br/>DocumentTemplate</p> |
| EmbeddedKey                | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b></p>   |

| Field                         | Details  |
|-------------------------------|--|
| HasSectionNumberReset         | <p><b>Type</b><br/>boolean</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>Indicates whether the section number must be reset in the generated web document.<br/>The default value is <code>false</code>.</p>        |
| IsBatchable                   | <p><b>Type</b><br/>boolean</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>Indicates whether the section must be generated using a batch job.<br/>The default value is <code>false</code>.</p>                       |
| IsDisplayOnNewPage            | <p><b>Type</b><br/>boolean</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>Indicates if the section must be displayed on a new page in the generated web document.<br/>The default value is <code>false</code>.</p>  |
| IsNewLineAfterSectionEnabled  | <p><b>Type</b><br/>boolean</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>Indicates whether a line should get added after the section in a generated web document.<br/>The default value is <code>false</code>.</p> |
| IsSectionNumberDisplayEnabled | <p><b>Type</b><br/>boolean</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>Indicates whether the section number must be displayed on the generated web document.<br/>The default value is <code>false</code>.</p>    |

| Field                   | Details  |
|-------------------------|--|
| IsTableHeaderRepeatable | <p><b>Type</b><br/>boolean</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>Indicates whether the table header must be displayed on every page in the generated web document.<br/><br/>The default value is <code>false</code>.</p> |
| Name                    | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Create, Filter, Group, idLookup, Sort, Update</p> <p><b>Description</b><br/>The name of the section in a document template.</p>   |
| ReferenceClassName      | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>The name of the custom class associated with the section.</p>   |
| SectionContent          | <p><b>Type</b><br/>textarea</p> <p><b>Properties</b><br/>Create, Nillable, Update</p> <p><b>Description</b><br/>The content of the section in either HTML or JSON format.</p>  |
| SectionSequenceNumber   | <p><b>Type</b><br/>double</p> <p><b>Properties</b><br/>Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b><br/>The sequence of the section in the generated web document.</p>   |
| SectionType             | <p><b>Type</b><br/>picklist</p> <p><b>Properties</b><br/>Create, Filter, Group, Restricted picklist, Sort, Update</p>  |

| Field                            | Details  |
|----------------------------------|--|
|                                  | <p><b>Description</b></p> <p>The type of section in a document template.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• Clause</li> <li>• Context</li> <li>• Custom</li> <li>• EmbeddedTemplate—Embedded Template</li> <li>• Image</li> <li>• Item</li> <li>• RepeatingContent—Repeating Content</li> <li>• Signature</li> </ul> |
| SectionTypeItemFontStyle         | <p><b>Type</b></p> <p>textarea</p> <p><b>Properties</b></p> <p>Create, Nillable, Update</p> <p><b>Description</b></p> <p>The field to select font style for the display of item section type in the generated web document.</p>  |
| SectionTypeItemFontValue         | <p><b>Type</b></p> <p>textarea</p> <p><b>Properties</b></p> <p>Create, Nillable, Update</p> <p><b>Description</b></p> <p>The value of the font style selected for the display of the item section type in the generated web document.</p>  |
| SectionTypeSignatureContent      | <p><b>Type</b></p> <p>textarea</p> <p><b>Properties</b></p> <p>Create, Nillable, Update</p> <p><b>Description</b></p> <p>The tokens used for integration with eSignature applications.</p>   |
| ShouldDisplayHeaderContentInline | <p><b>Type</b></p> <p>boolean</p> <p><b>Properties</b></p> <p>Create, Defaulted on create, Filter, Group, Sort, Update</p>   |

| Field                      | Details   |
|----------------------------|---|
|                            | <p><b>Description</b></p> <p>Indicates whether the section content must be displayed inline with the section header in the generated web document.</p> <p>The default value is <code>false</code>.</p>  |
| ShouldDisplayHeaderName    | <p><b>Type</b></p> <p>boolean</p> <p><b>Properties</b></p> <p>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b></p> <p>Indicates whether the section name must be displayed in the generated web document.</p> <p>The default value is <code>false</code>.</p>   |
| ShouldGenerateEmbeddedKey  | <p><b>Type</b></p> <p>boolean</p> <p><b>Properties</b></p> <p>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b></p> <p>Indicates whether the embedded key should be generated in the generated web document.</p> <p>The default value is <code>false</code>.</p> |
| TokenList                  | <p><b>Type</b></p> <p>textarea</p> <p><b>Properties</b></p> <p>Create, Nillable, Update</p> <p><b>Description</b></p> <p>The list of tokens used in a section of the generated web document.</p>  |
| TotalSectionConditionCount | <p><b>Type</b></p> <p>int</p> <p><b>Properties</b></p> <p>Filter, Group, Nillable, Sort</p> <p><b>Description</b></p> <p>The number of display conditions for the section in a document template.</p> <p>This field is a calculated field.</p>  |

## Associated Objects

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

**DocumentTemplateSectionChangeEvent**

Change events are available for the object.

**DocumentTemplateSectionFeed**

Feed tracking is available for the object.

**DocumentTemplateSectionHistory**

History is available for tracked fields of the object.

**DocumentTemplateSectionOwnerSharingRule**

Sharing rules are available for the object.

**DocumentTemplateSectionShare**

Sharing is available for the object.

## ESignatureConfig

The settings for integrating with external eSignature providers. This object is available in API version 56.0 and later.

### Supported Calls

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

### Fields

| Field      | Details  |
|------------|--|
| ConfigType | <p><b>Type</b><br/>picklist</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b><br/>Indicates the configured setting.<br/>Possible values are:</p> <ul style="list-style-type: none"> <li>• AnchorString</li> <li>• SignerRoles</li> <li>• SyncFileSizeLimit</li> <li>• CalloutTimeout</li> <li>• EnvelopesLastPollDate</li> <li>• CalloutNamedCredential</li> <li>• eSignVendorAccountId</li> <li>• RecipientsCustomClass</li> <li>• DocumentsCustomClass</li> </ul> <p>The default value is 'AnchorString'.</p> |

| Field       | Details   |
|-------------|---|
| ConfigValue | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>Value of the configured setting.</p>   |
| Description | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>The description for the configuration setting.</p>   |
| GroupType   | <p><b>Type</b><br/>picklist</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b><br/>The group to which the configuration setting belongs.<br/>Possible values are:</p> <ul style="list-style-type: none"> <li>• AnchorTabSetting</li> <li>• EnvelopeObjectLimits</li> <li>• CalloutConfigurationSetup</li> <li>• Envelope</li> <li>• eSignVendorAccount</li> <li>• CustomClassSetting</li> </ul> |
| Vendor      | <p><b>Type</b><br/>picklist</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b><br/>The provider type to which the configuration setting belongs. Currently only DocuSign is supported.</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.

**ESignatureConfigChangeEvent**

Change events are available for the object.

**ESignatureConfigFeed**

Feed tracking is available for the object.

**ESignatureConfigHistory**

History is available for tracked fields of the object.

**ESignatureConfigOwnerSharingRule**

Sharing rules are available for the object.

**ESignatureConfigShare**

Sharing is available for the object.

## ESignatureEnvelopeConfig

The notification-specific settings for integrating with external eSignature providers. This object is available in API version 56.0 and later.

### Supported Calls

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

### Fields

| Field                   | Details  |
|-------------------------|--|
| ExpirationPeriod        | <p><b>Type</b><br/>int</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>The expiration period for signing.</p>   |
| ExpirationWarningPeriod | <p><b>Type</b><br/>int</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>The number of days before expiration for warning notifications.</p>            |
| FirstReminderPeriod     | <p><b>Type</b><br/>int</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>The number of days between envelope delivery and the first reminder email.</p> |

| Field                       | Details   |
|-----------------------------|---|
| IsExpirationEnabled         | <p><b>Type</b><br/>boolean</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>Indicates whether expiration is enabled.<br/>The default value is 'false'.</p>                                   |
| IsReminderEnabled           | <p><b>Type</b><br/>boolean</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>Indicates whether reminders are enabled.<br/>The default value is 'false'.</p>                                   |
| IsVendorDefaultNtfcnEnabled | <p><b>Type</b><br/>boolean</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>Indicates whether the envelope uses account default notification settings.<br/>The default value is 'false'.</p> |
| ReminderIntervalPeriod      | <p><b>Type</b><br/>int</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>The interval in days between reminder emails.</p>   |
| TargetObjectName            | <p><b>Type</b><br/>picklist</p> <p><b>Properties</b><br/>Create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b><br/>The object to which the eSignature applies, such as an Opportunity, Quote, or Order.</p>                        |
| Vendor                      | <p><b>Type</b><br/>picklist</p>   |

| Field                   | Details   |
|-------------------------|---|
|                         | <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b><br/>The eSignature provider, for example DocuSign.</p> |
| VendorAccountIdentifier | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>The eSignature branding identifier.</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.

### **ESignatureEnvelopeConfigChangeEvent**

Change events are available for the object.

### **ESignatureEnvelopeConfigFeed**

Feed tracking is available for the object.

### **ESignatureEnvelopeConfigHistory**

History is available for tracked fields of the object.

### **ESignatureEnvelopeConfigOwnerSharingRule**

Sharing rules are available for the object.

### **ESignatureEnvelopeConfigShare**

Sharing is available for the object.

## ExternalDocStorageConfig

Represents a collection of fields to configure the external document storage for an object. It includes details such as location, path, and named credentials. For example, OneDrive is defined as an External Document Storage and is associated with the Salesforce Contract object.

## Supported Calls

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

## Fields

| Field                        | Details   |
|------------------------------|---|
| DocumentPath                 | <p><b>Type</b><br/>textarea</p> <p><b>Properties</b><br/>Create, Update</p> <p><b>Description</b><br/>Specifies the path from the root in the external storage where documents are stored.</p>  |
| ExternalDocStorageIdentifier | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>Specifies the ID of the external document storage.</p>   |
| NamedCredentialId            | <p><b>Type</b><br/>reference</p> <p><b>Properties</b><br/>Create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>The Named Credential associated with the External Document Storage Configuration. A named credential can be specified as an endpoint to simplify the setup of authenticated callouts.<br/><br/>This field is a relationship field.</p> <p><b>Relationship Name</b><br/>NamedCredential</p> <p><b>Relationship Type</b><br/>Lookup</p> <p><b>Refers To</b><br/>NamedCredential</p> |
| RecordTypeId                 | <p><b>Type</b><br/>reference</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>The Record Type associated with the Reference Object.<br/><br/>This field is a relationship field.</p> <p><b>Relationship Name</b><br/>RecordType</p>   |

| Field            | Details  |
|------------------|--|
|                  | <p><b>Relationship Type</b><br/>Lookup</p> <p><b>Refers To</b><br/>RecordType</p>  |
| StorageDriveType | <p><b>Type</b><br/>picklist</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b><br/>Specifies the external document storage drive. For example, Microsoft OneDrive.<br/>Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>MicrosoftOneDrive</code>—Microsoft OneDrive</li> </ul> <p>The default value is <code>MicrosoftOneDrive</code>.</p>              |
| TargetObject     | <p><b>Type</b><br/>picklist</p> <p><b>Properties</b><br/>Create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b><br/>Specifies the object associated with the external document storage. For example, Document Template, Contract, All.<br/>Possible values are:</p> <ul style="list-style-type: none"> <li>• <code>All</code></li> <li>• <code>Contract</code></li> <li>• <code>DocumentTemplate</code>—Document Template</li> </ul> |

## Associated Objects

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

### ExternalDocStorageConfigChangeEvent

Change events are available for the object.

### ExternalDocStorageConfigFeed

Feed tracking is available for the object.

### ExternalDocStorageConfigHistory

History is available for tracked fields of the object.

### ExternalDocStorageConfigOwnerSharingRule

Sharing rules are available for the object.

**ExternalDocStorageConfigShare**

Sharing is available for the object.

## GeneratedDocumentSection

Represents a section of a generated document. This object is available in API version 60.0 and later.

### Supported Calls

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

### Special Access Rules

### Fields

| Field                                  | Details  |
|--|--|
| <code>DisplayHeaderFontStyle</code>    | <p><b>Type</b><br/>textarea</p> <p><b>Properties</b><br/>Create, Nillable, Update</p> <p><b>Description</b><br/>Default font style of a section header in the generated web document.</p>  |
| <code>DocumentTemplateClauseId</code>  | <p><b>Type</b><br/>reference</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>ID of the document template clause association with the section.<br/>This field is a relationship field.</p> <p><b>Relationship Name</b><br/>DocumentTemplateClause</p> <p><b>Refers To</b><br/>DocumentClause</p> |
| <code>DocumentTemplateSectionId</code> | <p><b>Type</b><br/>reference</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>ID of the associated document template section.</p>  |

| Field               | Details   |
|---------------------|---|
|                     | <p>This field is a relationship field.</p> <p><b>Relationship Name</b><br/>DocumentTemplateSection</p> <p><b>Refers To</b><br/>DocumentTemplateSection</p>  |
| GeneratedDocumentId | <p><b>Type</b><br/>reference</p> <p><b>Properties</b><br/>Create, Filter, Group, Sort</p> <p><b>Description</b><br/>ID of the generated document associated with the section.<br/>This field is a relationship field.</p> <p><b>Relationship Name</b><br/>GeneratedDocument</p> <p><b>Relationship Type</b><br/>Master-detail</p> <p><b>Refers To</b><br/>GeneratedDocument (the master object)</p> |
| IsBeginSplitSection | <p><b>Type</b><br/>boolean</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>Indicates whether the section must be split in the generated web document.<br/>The default value is <code>false</code>.</p>  |
| IsEndSplitSection   | <p><b>Type</b><br/>boolean</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>Indicates whether the section split must end in the generated web document.<br/>The default value is <code>false</code>.</p>   |
| LastReferencedDate  | <p><b>Type</b><br/>dateTime</p> <p><b>Properties</b><br/>Filter, Nillable, Sort</p>   |

| Field                       | Details  |
|-----------------------------|--|
|                             | <p><b>Description</b><br/>The timestamp for when the current user last viewed a record related to this record.</p>   |
| LastViewedDate              | <p><b>Type</b><br/>dateTime</p> <p><b>Properties</b><br/>Filter, Nillable, Sort</p> <p><b>Description</b><br/>The timestamp for when the current user last viewed this record. If this value is null, this record might only have been referenced (LastReferencedDate) and not viewed.</p> |
| Name                        | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Create, Filter, Group, idLookup, Sort, Update</p> <p><b>Description</b><br/>The name of the section in the generated web document.</p>  |
| SectionContent              | <p><b>Type</b><br/>textarea</p> <p><b>Properties</b><br/>Create, Nillable, Update</p> <p><b>Description</b><br/>The section content that's stored as HTML.</p>   |
| SectionOrder                | <p><b>Type</b><br/>double</p> <p><b>Properties</b><br/>Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b><br/>The order of the section in the section's hierarchy.</p>   |
| SectionTypeSignatureContent | <p><b>Type</b><br/>textarea</p> <p><b>Properties</b><br/>Create, Nillable, Update</p> <p><b>Description</b><br/>The tokens used for integration with eSignature applications.</p>  |
| SplitSectionSequenceNumber  | <p><b>Type</b><br/>double</p>  |

| Field                  | Details  |
|------------------------|--|
|                        | <p><b>Properties</b><br/>Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b><br/>The sequence of the section that's split in the generated web document.</p>                                |
| TemplateSectionContent | <p><b>Type</b><br/>textarea</p> <p><b>Properties</b><br/>Create, Nillable, Update</p> <p><b>Description</b><br/>The content of the section in the original format.</p>                                   |
| TokenList              | <p><b>Type</b><br/>textarea</p> <p><b>Properties</b><br/>Create, Nillable, Update</p> <p><b>Description</b><br/>The list of tokens used to define a section condition in the generated web document.</p> |
| XmlContent             | <p><b>Type</b><br/>textarea</p> <p><b>Properties</b><br/>Create, Nillable, Update</p> <p><b>Description</b><br/>The content of the section in the generated web document in the XML format.</p>          |

## ObjectStateActionDefinition

Represents the link between the object state definition and object state transition based on a defined action.

### Supported Calls

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

### Fields

| Field      | Details                         |
|------------|---------------------------------|
| ActionType | <p><b>Type</b><br/>picklist</p> |

| Field               | Details  |
|---------------------|--|
|                     | <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b><br/>Specifies the action type for the object state action definition, whether it's Apex or Reference Object.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• Apex</li> <li>• ReferenceObject—Reference Object</li> </ul> |
| DisplayLabel        | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>The display name of the object state action definition.</p>   |
| InvocableClassName  | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>The name of the Apex invocable class.</p>   |
| InvocableMethodName | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>The name of the Apex invocable class method.</p>  |
| IsSystem            | <p><b>Type</b><br/>boolean</p> <p><b>Properties</b><br/>Defaulted on create, Filter, Group, Sort</p> <p><b>Description</b><br/>Indicates whether the action is provided by the Salesforce (True) application or is a custom action (False). The field is uneditable.</p>   |
| Name                | <p><b>Type</b><br/>string</p>  |

| Field             | Details  |
|-------------------|--|
|                   | <p><b>Properties</b><br/>Create, Filter, Group, idLookup, Sort</p> <p><b>Description</b><br/>The API name of the object state action definition.</p>   |
| OwnerId           | <p><b>Type</b><br/>reference</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>The name of the user who creates the object state action definition.<br/>This field is a polymorphic relationship field.</p> <p><b>Relationship Name</b><br/>Owner</p> <p><b>Relationship Type</b><br/>Lookup</p> <p><b>Refers To</b><br/>Group, User</p> |
| ReferenceObjectId | <p><b>Type</b><br/>reference</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>The Reference Object associated with the Object State Action Definition.<br/>This field is a relationship field.</p> <p><b>Relationship Name</b><br/>ReferenceObject</p> <p><b>Relationship Type</b><br/>Lookup</p> <p><b>Refers To</b><br/>OmniProcess</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.

### ObjectStateActionDefinitionChangeEvent

Change events are available for the object.

**ObjectStateActionDefinitionFeed**

Feed tracking is available for the object.

**ObjectStateActionDefinitionHistory**

History is available for tracked fields of the object.

**ObjectStateActionDefinitionOwnerSharingRule**

Sharing rules are available for the object.

**ObjectStateActionDefinitionShare**

Sharing is available for the object.

## ObjectStateTransitionAction

Represents a junction between object state transition and object state action definition. State transition determines the valid transition of an object from one state to another and the state action determines which action triggers which state transition.

### Supported Calls

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

### Fields

| Field           | Details  |
|-----------------|--|
| DisplaySequence | <p><b>Type</b><br/>int</p> <p><b>Properties</b><br/>Create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>Determines the display order of the object state action for the associated state transition. Supports a whole number that's greater than 0 to define the order.</p>  |
| IsActive        | <p><b>Type</b><br/>boolean</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>Indicates whether the object state action definition for the specified object state transition is active (True) or not (False).<br/><br/>The default value is <code>false</code>.</p> |
| Name            | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Create, Filter, Group, idLookup, Sort, Update</p>   |

| Field                         | Details   |
|-------------------------------|---|
|                               | <p><b>Description</b><br/>The name of the object state action transition.</p>   |
| ObjectStateActionDefinitionId | <p><b>Type</b><br/>reference</p> <p><b>Properties</b><br/>Create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>The object state action definition associated with the record.<br/>This field is a relationship field.</p> <p><b>Relationship Name</b><br/>ObjectStateActionDefinition</p> <p><b>Relationship Type</b><br/>Lookup</p> <p><b>Refers To</b><br/>ObjectStateActionDefinition</p> |
| ObjectStateDefinitionId       | <p><b>Type</b><br/>reference</p> <p><b>Properties</b><br/>Create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>The object state definition associated with the record.<br/>This field is a relationship field.</p> <p><b>Relationship Name</b><br/>ObjectStateDefinition</p> <p><b>Relationship Type</b><br/>Lookup</p> <p><b>Refers To</b><br/>ObjectStateDefinition</p>                    |
| ObjectStateTransitionId       | <p><b>Type</b><br/>reference</p> <p><b>Properties</b><br/>Create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>The object state definition transition with the record.<br/>This field is a relationship field.</p> <p><b>Relationship Name</b><br/>ObjectStateTransition</p>   |

| Field   | Details   |
|---------|---|
|         | <p><b>Relationship Type</b><br/>Lookup</p> <p><b>Refers To</b><br/>ObjectStateTransition</p>  |
| OwnerId | <p><b>Type</b><br/>reference</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>This field is a polymorphic relationship field.</p> <p><b>Relationship Name</b><br/>Owner</p> <p><b>Relationship Type</b><br/>Lookup</p> <p><b>Refers To</b><br/>Group, User</p> |

## Associated Objects

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

### **ObjectStateTransitionActionChangeEvent**

Change events are available for the object.

### **ObjectStateTransitionActionFeed**

Feed tracking is available for the object.

### **ObjectStateTransitionActionHistory**

History is available for tracked fields of the object.

### **ObjectStateTransitionActionOwnerSharingRule**

Sharing rules are available for the object.

### **ObjectStateTransitionActionShare**

Sharing is available for the object.

## Obligation

Represents an obligation between parties to fulfill agreed conditions, such as contractual commitments. The obligation commitment assists with a strategy to achieve the desired outcome within a set timeframe and reduce risk with compliance tracking. For example, payment due dates, contract terms, renewals. This object is available in API version 59.0 and later.

## Supported Calls

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

## Special Access Rules

This object is available if your org has ObligationManagement permission license.

## Fields

| Field          | Details  |
|----------------|--|
| AssigneeUserId | <p><b>Type</b><br/>reference</p> <p><b>Properties</b><br/>Create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>The ID of the assignee user associated with the obligation.<br/>This field is a relationship field.</p> <p><b>Relationship Name</b><br/>AssigneeUser</p> <p><b>Relationship Type</b><br/>Lookup</p> <p><b>Refers To</b><br/>User</p> |
| Description    | <p><b>Type</b><br/>textarea</p> <p><b>Properties</b><br/>Create, Nillable, Update</p> <p><b>Description</b><br/>The description of the obligation.</p>   |
| EndDate        | <p><b>Type</b><br/>date</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>The end date of the obligation.</p>   |
| Name           | <p><b>Type</b><br/>string</p>  |

| Field               | Details  |
|---------------------|--|
|                     | <p><b>Properties</b><br/>Create, Filter, Group, idLookup, Sort, Update</p> <p><b>Description</b><br/>The name of the obligation.</p>   |
| OtherPartyAccountId | <p><b>Type</b><br/>reference</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>The ID of the other party account associated with the obligation.<br/>This field is a relationship field.</p> <p><b>Relationship Name</b><br/>OtherPartyAccount</p> <p><b>Relationship Type</b><br/>Lookup</p> <p><b>Refers To</b><br/>Account</p> |
| OwnerId             | <p><b>Type</b><br/>reference</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>The ID of the user that owns this record.<br/>This field is a polymorphic relationship field.</p> <p><b>Relationship Name</b><br/>Owner</p> <p><b>Relationship Type</b><br/>Lookup</p> <p><b>Refers To</b><br/>Group, User</p>          |
| Party               | <p><b>Type</b><br/>picklist</p> <p><b>Properties</b><br/>Create, Filter, Group, Restricted picklist, Sort, Update</p> <p><b>Description</b><br/>The party who executes or delivers the obligation. The default value is <code>First_Party</code>.<br/>Possible values are:</p>   |

| Field               | Details   |
|---------------------|---|
|                     | <ul style="list-style-type: none"> <li>FIRST_PARTY</li> <li>OTHER_PARTY</li> </ul>  |
| ReferenceContractId | <p><b>Type</b><br/>reference</p> <p><b>Properties</b><br/>Filter, Group, Nillable, Sort</p> <p><b>Description</b><br/>The contract associated with the obligation.<br/>This field is a relationship field.</p> <p><b>Relationship Name</b><br/>ReferenceContract</p> <p><b>Relationship Type</b><br/>Lookup</p> <p><b>Refers To</b><br/>Contract</p>                          |
| ReferenceObjectId   | <p><b>Type</b><br/>reference</p> <p><b>Properties</b><br/>Create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>The object associated with the obligation. For example, Contract.<br/>This field is a relationship field.</p> <p><b>Relationship Name</b><br/>ReferenceObject</p> <p><b>Relationship Type</b><br/>Lookup</p> <p><b>Refers To</b><br/>Contract</p> |
| StartDate           | <p><b>Type</b><br/>date</p> <p><b>Properties</b><br/>Create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>The start date of the obligation.</p>  |
| State               | <p><b>Type</b><br/>picklist</p>   |

| Field              | Details  |
|--------------------|--|
|                    | <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b><br/>The start date of the obligation.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• Active</li> <li>• Expired</li> <li>• InActive—Inactive</li> <li>• OnHold—On Hold</li> </ul> <p>The default value is OnHold.</p>                |
| Status             | <p><b>Type</b><br/>picklist</p> <p><b>Properties</b><br/>Create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>Specifies the status of the obligation.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• Compliant—Compliant</li> <li>• Non Compliant—Non Compliant</li> <li>• At Risk—At Risk</li> <li>• None—None</li> </ul> <p>The default value is Compliant.</p> |
| StatusChangeReason | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>The reason to change the obligation status.</p>   |
| Type               | <p><b>Type</b><br/>picklist</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>The type of Obligation. For example, Manufacturing Obligation, or Payment Obligation.</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.

### ObligationChangeEvent

Change events are available for the object.

### ObligationFeed

Feed tracking is available for the object.

### ObligationHistory

History is available for tracked fields of the object.

### ObligationOwnerSharingRule

Sharing rules are available for the object.

### ObligationShare

Sharing is available for the object.

## SalesContractLine

Stores a contract's product information, including price, quantity, and components covered. This object is available in API version 56.0 and later.

## Supported Calls

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

## Fields

| Field      | Details  |
|------------|--|
| ContractId | <p><b>Type</b><br/>reference</p> <p><b>Properties</b><br/>Create, Filter, Group, Sort</p> <p><b>Description</b><br/>Parent contract identifier.<br/>This is a relationship field.</p> <p><b>Relationship Name</b><br/>Contract</p> <p><b>Relationship Type</b><br/>Lookup</p> <p><b>Refers To</b><br/>Contract</p> |

| Field                | Details   |
|----------------------|---|
| Description          | <p><b>Type</b><br/>textarea</p> <p><b>Properties</b><br/>Create, Nillable, Update</p> <p><b>Description</b><br/>Description of the contract line item.</p>                          |
| EffectiveEndTime     | <p><b>Type</b><br/>dateTime</p> <p><b>Properties</b><br/>Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b><br/>End date and time for the line item.</p>              |
| EffectiveStartTime   | <p><b>Type</b><br/>dateTime</p> <p><b>Properties</b><br/>Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b><br/>Start date and time for the line item.</p>            |
| LineItemNumber       | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>Indicates the line item number.</p>              |
| Name                 | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Create, Filter, Group, idLookup, Sort, Update</p> <p><b>Description</b><br/>Name of the contract line item.</p>              |
| OpportunityProductId | <p><b>Type</b><br/>reference</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>ID of the associated OpportunityLineItem.</p> |

| Field              | Details  |
|--------------------|--|
|                    | <p>This is a relationship field.</p> <p><b>Relationship Name</b><br/>OpportunityProduct</p> <p><b>Relationship Type</b><br/>Lookup</p> <p><b>Refers To</b><br/>OpportunityLineItem</p>   |
| OrderProductId     | <p><b>Type</b><br/>reference</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>ID of the associated OrderItem.<br/><br/>This is a relationship field.</p> <p><b>Relationship Name</b><br/>OrderProduct</p> <p><b>Relationship Type</b><br/>Lookup</p> <p><b>Refers To</b><br/>OrderItem</p>   |
| OriginalLineItemId | <p><b>Type</b><br/>reference</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>ID of the original line item that this line item references (for example if this line item is due to a contract amendment).<br/><br/>This is a relationship field.</p> <p><b>Relationship Name</b><br/>OriginalLineItem</p> <p><b>Relationship Type</b><br/>Lookup</p> <p><b>Refers To</b><br/>SalesContractLine</p> |
| Product2Id         | <p><b>Type</b><br/>reference</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p>  |

| Field       | Details  |
|-------------|--|
|             | <p><b>Description</b><br/>Product ID associated with the line item.<br/>This is a relationship field.</p> <p><b>Relationship Name</b><br/>Product2</p> <p><b>Relationship Type</b><br/>Lookup</p> <p><b>Refers To</b><br/>Product2</p>   |
| ProductCode | <p><b>Type</b><br/>textarea</p> <p><b>Properties</b><br/>Create, Nillable, Update</p> <p><b>Description</b><br/>Product code associated with the line item.</p>  |
| Quantity    | <p><b>Type</b><br/>double</p> <p><b>Properties</b><br/>Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b><br/>Product quantity associated with the line item.</p>  |
| Status      | <p><b>Type</b><br/>picklist</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>Status of the contract line item.<br/>Possible values are:</p> <ul style="list-style-type: none"> <li>• Active</li> <li>• Inactive</li> </ul> |
| TotalPrice  | <p><b>Type</b><br/>currency</p> <p><b>Properties</b><br/>Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b><br/>Total price of the line item.</p>  |

| Field     | Details  |
|-----------|--|
| UnitPrice | <p><b>Type</b><br/>currency</p> <p><b>Properties</b><br/>Create, Filter, Nillable, Sort, Update</p> <p><b>Description</b><br/>Unit price of the line item.</p> |

## Associated Objects

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

### SalesContractLineChangeEvent

Change events are available for the object.

### SalesContractLineFeed

Feed tracking is available for the object.

### SalesContractLineHistory

History is available for tracked fields of the object.

### SalesContractLineOwnerSharingRule

Sharing rules are available for the object.

### SalesContractLineShare

Sharing is available for the object.

## UserEsignVendorIdentifier

Used for integrating eSignature users. This object is available in API version 56.0 and later.

## Supported Calls

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

## Fields

| Field                  | Details   |
|------------------------|---|
| ExternalUserIdentifier | <p><b>Type</b><br/>string</p> <p><b>Properties</b><br/>Create, Filter, Group, Nillable, Sort, Update</p> <p><b>Description</b><br/>The user identifier used by the eSignature provider.</p> |

| Field      | Details  |
|------------|--|
| UserId     | <p><b>Type</b><br/>reference</p> <p><b>Properties</b><br/>Create, Filter, Group, Sort, Update</p> <p><b>Description</b><br/>The Salesforce user identifier.<br/>This is a relationship field.</p> <p><b>Relationship Name</b><br/>User</p> <p><b>Relationship Type</b><br/>Lookup</p> <p><b>Refers To</b><br/>User</p>   |
| Vendor     | <p><b>Type</b><br/>picklist</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b><br/>The eSignature provider.<br/>Possible values are:</p> <ul style="list-style-type: none"> <li>• DocuSign</li> </ul> <p>The default value is 'DocuSign'.</p>                              |
| VendorType | <p><b>Type</b><br/>picklist</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b><br/>Indicates the type of vendor.<br/>Possible values are:</p> <ul style="list-style-type: none"> <li>• Internal</li> <li>• eSignature</li> </ul> <p>The default value is 'eSignature'.</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.

**UserEsignVendorIdentifierChangeEvent**

Change events are available for the object.

**UserEsignVendorIdentifierFeed**

Feed tracking is available for the object.

**UserEsignVendorIdentifierHistory**

History is available for tracked fields of the object.

**UserEsignVendorIdentifierOwnerSharingRule**

Sharing rules are available for the object.

**UserEsignVendorIdentifierShare**

Sharing is available for the object.

## Apex Reference

---

This Apex reference goes into detail about the built-in Apex classes and interfaces grouped by namespace for Salesforce Contracts.

For Apex-related objects and SOAP API calls, see [Objects and SOAP API Calls and Headers for Apex](#) in the *SOAP API Developer Guide*.

[ind\\_docgen\\_api Namespace](#)

The `ind_docgen_api` namespace provides class for scheduling Envelope Status updates.

[industries\\_clm Namespace](#)

The `industries_clm` namespace allows user to provide custom logic for any specific task permitted by salesforce. For example, Custom Document Template Filtering, which allows user to provide the filtering logic on Document tab under Contract.

[industries\\_docgen Namespace](#)

The `industries_docgen` namespace provides classes and methods for document generation and permission management in Salesforce Industries.

## ind\_docgen\_api Namespace

The `ind_docgen_api` namespace provides class for scheduling Envelope Status updates.

The following are the classes in the `ind_docgen_api` namespace.

[EnvelopeStatusScheduler Class](#)

The `ind_docgen_api.EnvelopeStatusScheduler` class schedules Envelope Status updates.

[OpenInterface Interface](#)

The `OpenInterface` provides user the capability to provide custom logic for task permitted by Salesforce.

## EnvelopeStatusScheduler Class

The `ind_docgen_api.EnvelopeStatusScheduler` class schedules Envelope Status updates.

### Namespace

[ind\\_docgen\\_api](#)

## Example

```
ind_docgen_api.EnvelopeStatusScheduler envelopeScheduler = new
ind_docgen_api.EnvelopeStatusScheduler();
System.schedule('Update Docusign Envelope Job 1', '0 0 * * * ?', envelopeScheduler);
System.schedule('Update Docusign Envelope Job 2', '0 15 * * * ?', envelopeScheduler);
System.schedule('Update Docusign Envelope Job 3', '0 30 * * * ?', envelopeScheduler);
System.schedule('Update Docusign Envelope Job 4', '0 45 * * * ?', envelopeScheduler);
```

[EnvelopeStatusScheduler Methods](#)

## EnvelopeStatusScheduler Methods

The following are methods for `EnvelopeStatusScheduler`.

[execute\(ctx\)](#)

Executes the scheduled Apex job for Envelope Status Updates.

### **execute (ctx)**

Executes the scheduled Apex job for Envelope Status Updates.

Signature

```
public void execute(System.SchedulableContext ctx)
```

Parameters

*ctx*

Type: `System.SchedulableContext`

Contains the job ID.

Return Value

Type: `void`

## OpenInterface Interface

The `OpenInterface` provides user the capability to provide custom logic for task permitted by Salesforce.

## Namespace

[ind\\_docgen\\_api](#)

[OpenInterface Methods](#)

[OpenInterface Example Implementation](#)

## OpenInterface Methods

The following are methods for `OpenInterface`.

`invokeMethod(var1, var2, var3)`

Invokes method based on the use-case.

**`invokeMethod(var1, var2, var3)`**

Invokes method based on the use-case.

Signature

```
public Boolean invokeMethod(String var1, Map<String, ANY> var2, Map<String, ANY> var3)
```

Parameters

`var1`

Type: String

Contains the name of the method that is supposed to be implemented from invoke method.

`var2`

Type: Map<String, ANY>

Contains the inputs as per the use-case.

`var3`

Type: Map<String, ANY>

Returns the output as per the use-case.

Return Value

Type: Boolean

true or false

## OpenInterface Example Implementation

This is an example implementation of the `ind_docgen_api.OpenInterface` interface.

```
global class TestTF implements ind_docgen_api.OpenInterface {
    public Boolean invokeMethod(String methodName, Map<String, Object> request, Map<String,
    Object> outMap) {
        Boolean success = true;
        if (methodName == 'getDocumentTemplateList') {
            getTemplateList(request, outMap);
        }
        return success;
    }

    private void getTemplateList(Map < String, Object > inputMap, Map < String, Object > outMap)
    {
        String contractId = (String) inputMap.get('contractId');
    }
}
```

```

String usageType = (String) inputMap.get('usageType');
String billingCountry;
List<Contract> contractList = [SELECT BillingCountry, Id FROM Contract where Id =
:contractId];
if(!contractList.isEmpty()) {
Contract contract = contractList.get(0);
billingCountry = contract.BillingCountry != null ? contract.BillingCountry : '';
}
List<DocumentTemplate> templist;
String objName = 'DocumentTemplate';
try {
if(billingCountry.equalsIgnoreCase('India')) {
templist = [select id, isActive, name, type, versionNumber from DocumentTemplate where
IsActive=true and Type = 'MicrosoftWord' and Name like '%APAC%'
order by Name];
} else {
templist = [select id, isActive, name, type, versionNumber from DocumentTemplate where
IsActive=true and Type = 'MicrosoftWord' order by Name];
}
} catch (Exception e) {
throw e;
}
if (templist != null && templist.size() > 0) {
outMap.put('documentTemplateList', templist);
}
}
}

```

## industries\_clm Namespace

The `industries_clm` namespace allows user to provide custom logic for any specific task permitted by salesforce. For example, Custom Document Template Filtering, which allows user to provide the filtering logic on Document tab under Contract.

The following are the classes in the `industries_clm` namespace.

### [OpenInterface Interface](#)

The `OpenInterface` provides user the capability to provide custom logic for task permitted by Salesforce.

## OpenInterface Interface

The `OpenInterface` provides user the capability to provide custom logic for task permitted by Salesforce.

## Namespace

[industries\\_clm](#)

### [OpenInterface Methods](#)

### [OpenInterface Example Implementation](#)

## OpenInterface Methods

The following are methods for OpenInterface.

`invokeMethod(var1, var2, var3)`

Invokes method based on the use-case.

### **invokeMethod(var1, var2, var3)**

Invokes method based on the use-case.

Signature

```
public Boolean invokeMethod(String var1, Map<String, Object> var2, Map<String, Object> var3)
```

Parameters

*var1*

Type: String

Contains the name of the method that is supposed to be implemented from invoke method.

*var2*

Type: Map<String, ANY>

Contains the inputs as per the use-case.

*var3*

Type: Map<String, ANY>

Returns the output as per the use-case.

Return Value

Type: Boolean

true or false

## OpenInterface Example Implementation

This is an example implementation of the industries\_clm.OpenInterface interface.

```
global class TestTF implements industries_clm.OpenInterface {
    public Boolean invokeMethod(String methodName, Map<String, Object> request, Map<String, Object> outMap) {
        Boolean success = true;
        if (methodName == 'getDocumentTemplateList') {
            getTemplateList(request, outMap);
        }
        return success;
    }

    private void getTemplateList(Map < String, Object > inputMap, Map < String, Object > outMap)
```

```

{
String contractId = (String) inputMap.get('contractId');
String usageType = (String) inputMap.get('usageType');
String billingCountry;
List<Contract> contractList = [SELECT BillingCountry, Id FROM Contract where Id =
:contractId];
if(!contractList.isEmpty()) {
Contract contract = contractList.get(0);
billingCountry = contract.BillingCountry != null ? contract.BillingCountry : '';
}
List<DocumentTemplate> templist;
String objName = 'DocumentTemplate';
try {
if(billingCountry.equalsIgnoreCase('India')) {
templist = [select id, isActive, name, type, versionNumber from DocumentTemplate where
IsActive=true and Type = 'MicrosoftWord' and Name like '%APAC%'
order by Name];
} else {
templist = [select id, isActive, name, type, versionNumber from DocumentTemplate where
IsActive=true and Type = 'MicrosoftWord' order by Name];
}
} catch (Exception e) {
throw e;
}
if (templist != null && templist.size() > 0) {
outMap.put('documentTemplateList', templist);
}
}
}
}

```

## industries\_docgen Namespace

The `industries_docgen` namespace provides classes and methods for document generation and permission management in Salesforce Industries.

The following are the classes in the `industries_docgen` namespace.

### [DocGenPermsAndAccessChecksService Class](#)

The `DocGenPermsAndAccessChecksService` class contains methods to check permissions and settings related to document generation and integration features.

### [DocumentGenerationProcess Class](#)

The `DocumentGenerationProcess` class provides methods to manage document generation processes.

### [DocumentTemplate Class](#)

The `DocumentTemplate` class provides methods to manage document generation templates.

## DocGenPermsAndAccessChecksService Class

The `DocGenPermsAndAccessChecksService` class contains methods to check permissions and settings related to document generation and integration features.

## Namespace

[industries\\_docgen](#)

## Example

```
industries_docgen.DocGenPermsAndAccessChecksService.isDesigner(UserInfo.getOrganizationId(),
    userInfo.getUserId(), 'DocGenDesigner');
industries_docgen.DocGenPermsAndAccessChecksService.isRuntimeUser(UserInfo.getOrganizationId(),
    userInfo.getUserId(), 'DocGenRuntimeUser');
industries_docgen.DocGenPermsAndAccessChecksService.isRuntimeCCUser(UserInfo.getOrganizationId(),
    userInfo.getUserId(), 'DocGenRuntimeCCUser');
```

This Apex code sample checks whether a user has specific docgen permissions.

[DocGenPermsAndAccessChecksService Methods](#)

## DocGenPermsAndAccessChecksService Methods

The following are methods for `DocGenPermsAndAccessChecksService`.

[hasDocGenMetadataSetting\(orgId, orgPreference\)](#)

Checks whether the DocGen metadata setting is enabled for the org (`true`) or not (`false`).

[hasDocGenOrgPerm\(orgId, orgPermission\)](#)

Checks whether the org has the DocGen permission (`true`) or not (`false`).

[hasMS365IntegrationSettingOrgPerm\(orgId, orgPermission\)](#)

Checks whether the org has a Microsoft 365 integration setting permission enabled (`true`) or not (`false`).

[hasOmnistudioOrgPerm\(orgId, orgPermission\)](#)

Checks whether the org has Omnistudio permission enabled (`true`) or not (`false`).

[isDesigner\(orgId, userId, userPerm\)](#)

Checks whether the user has designer permissions enabled (`true`) or not (`false`).

[isRuntimeCCUser\(orgId, userId, userPerm\)](#)

Checks whether the user has runtime customer community user permissions (`true`) or not (`false`).

[isRuntimeUser\(orgId, userId, userPerm\)](#)

Checks whether the user has runtime user permissions (`true`) or not (`false`).

### **hasDocGenMetadataSetting(orgId, orgPreference)**

Checks whether the DocGen metadata setting is enabled for the org (`true`) or not (`false`).

Signature

```
public static Boolean hasDocGenMetadataSetting(String orgId, String orgPreference)
```

## Parameters

*orgId*

Type: String

ID of the org.

*orgPreference*

Type: String

Name of the DocGen metadata setting.

## Return Value

Type: Boolean

**hasDocGenOrgPerm(orgId, orgPermission)**Checks whether the org has the DocGen permission (`true`) or not (`false`).

## Signature

```
public static Boolean hasDocGenOrgPerm(String orgId, String orgPermission)
```

## Parameters

*orgId*

Type: String

ID of the org.

*orgPermission*

Type: String

Name of the permission.

## Return Value

Type: Boolean

**hasMS365IntegrationSettingOrgPerm(orgId, orgPermission)**Checks whether the org has a Microsoft 365 integration setting permission enabled (`true`) or not (`false`).

## Signature

```
public static Boolean hasMS365InetgrationSettingOrgPerm(String orgId, String orgPermission)
```

## Parameters

*orgId*

Type: String

ID of the org.

*orgPermission*

Type: String

Name of the permission.

Return Value

Type: Boolean

### **hasOmnistudioOrgPerm(orgId, orgPermission)**

Checks whether the org has Omnistudio permission enabled (`true`) or not (`false`).

Signature

```
public static Boolean hasOmnistudioOrgPerm(String orgId, String orgPermission)
```

Parameters

*orgId*

Type: String

ID of the org.

*orgPermission*

Type: String

Name of the Omnistudio permission.

Return Value

Type: Boolean

### **isDesigner(orgId, userId, userPerm)**

Checks whether the user has designer permissions enabled (`true`) or not (`false`).

Signature

```
public static Boolean isDesigner(String orgId, String userId, String userPerm)
```

Parameters

*orgId*

Type: String

ID of the org.

*userId*

Type: String

ID of the user.

*userPerm*

Type: String

Name of the user permission to check for designer status.

Return Value

Type: Boolean

SEE ALSO:

[Salesforce Help: Permission Set Licenses for Omnistudio Document Generation](#)

**isRuntimeCCUser(orgId, userId, userPerm)**

Checks whether the user has runtime customer community user permissions (`true`) or not (`false`).

Signature

```
public static Boolean isRuntimeCCUser(String orgId, String userId, String userPerm)
```

Parameters

*orgId*

Type: String

ID of the org.

*userId*

Type: String

ID of the user.

*userPerm*

Type: String

Name of the user permission to check for runtime customer community user status.

Return Value

Type: Boolean

SEE ALSO:

[Salesforce Help: Permission Set Licenses for Omnistudio Document Generation](#)

**isRuntimeUser(orgId, userId, userPerm)**

Checks whether the user has runtime user permissions (`true`) or not (`false`).

Signature

```
public static Boolean isRuntimeUser(String orgId, String userId, String userPerm)
```

Parameters

*orgId*

Type: String

ID of the org.

*userId*

Type: String

ID of the user.

*userPerm*

Type: String

Name of the user permission to check for runtime user status.

Return Value

Type: Boolean

## DocumentGenerationProcess Class

The `DocumentGenerationProcess` class provides methods to manage document generation processes.

### Namespace

[industries\\_docgen](#)

### Example

```
Map<String, Object> parameters = new Map<String, Object>();
parameters.put('requestText', '{}');
parameters.put('type', 'GenerateAndConvert');
parameters.put('status', 'InProgress');
parameters.put('title', 'TestTitle');
//industries_docgen.DocumentGenerationProcess.createDocumentGenerationProcess(parameters);
Type type = Type.forName('industries_docgen.DocumentGenerationProcess');
System.Callable docgen = (System.Callable) type.newInstance();
docgen.Call('createDocumentGenerationProcess', parameters);
```

This Apex code creates a `DocumentGenerationProcess` record for server-side document generation. This code uses a Map as input that contains all the required fields to create an entry in the database.

[DocumentGenerationProcess Methods](#)

### DocumentGenerationProcess Methods

The following are methods for `DocumentGenerationProcess`.

[Call\(methodName, inputMap\)](#)

Invokes a method with specified input parameters for the document generation process.

**Call(methodName, inputMap)**

Invokes a method with specified input parameters for the document generation process.

## Signature

```
public Object Call(String methodName, Map<String, Object> inputMap)
```

## Parameters

*methodName*

Type: String

Name of the method to be called.

*inputMap*

Type: Map&lt;String, Object&gt;

Map that contains input parameters for the method that is called.

## Return Value

Type: Object

## DocumentTemplate Class

The `DocumentTemplate` class provides methods to manage document generation templates.

## Namespace

[industries\\_docgen](#)

## Example

```
System.Callable connect = (System.Callable) type.newInstance();
Map<String, Object> inputMap = new Map<String, Object>();
inputMap.put('documentTemplateId', templateId);
docTemplate =
SObjectProxy.of(DocGenObjectMappings.getSObjectType(DocGenObjectMappings.DOCUMENT_TEMPLATE_STR).newSObject());
Map<String, Object> mapData = (Map<String,
Object>)connect.Call('getNamespaceByDocumentTemplateId', inputMap);
```

This GET request retrieves the Namespace field from the DocumentTemplate entity, using the documentTemplate ID as input.

[DocumentTemplate Methods](#)

## DocumentTemplate Methods

The following are methods for `DocumentTemplate`.

[Call\(methodName, inputMap\)](#)

Invokes a method with input parameters to manage document templates.

**Call(methodName, inputMap)**

Invokes a method with input parameters to manage document templates.

Signature

```
public Object Call(String methodName, Map<String, ANY> inputMap)
```

Parameters

*methodName*

Type: String

Name of the method to be called.

*inputMap*

Type: Map<String, ANY>

Map that contains input parameters for the method that is called.

Return Value

Type: `Object`

## Salesforce Contracts Resources

---

Salesforce Contracts Business APIs (CLM and E-signature) are RESTful APIs that are sometimes available as Apex classes and methods.

### [REST Reference](#)

You can access Salesforce Contracts APIs using REST endpoints. These REST APIs follow similar conventions as Connect REST APIs.

## REST Reference

You can access Salesforce Contracts 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 Salesforce Contracts API resources.

### [Request Bodies](#)

Here's a list of Salesforce Contracts API request bodies.

### [Response Bodies](#)

Here's a list of Salesforce Contracts response bodies.

SEE ALSO:

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

## Resources

Here's a list of Salesforce Contracts API resources.

### Clause Library Resources

Manage Salesforce Contracts clause library resources.

### CLM Resources

Manage Salesforce Contracts CLM resources. Check in and check out a contract document. Get and delete content document details. Execute actions for a contract based on the status. Update and create contracts. Get and create contract document versions. Get the status of document generation process. Get the list of configured templates for a usage type. Get a list of actions possible for a particular contract. Lock and unlock an active contract document version. Change a template in a contract document version.

### Context Mapping Extraction Resources

Manage custom mappings used in the extraction flow of documents before their fields are sent for extraction. Use the Extraction Context Mapping resource to map extracted field values to their own set of custom fields relevant to their contract types and business cases.

### Customer Community Resources

Manage document control for Customer Community (CC) users by using Salesforce's Contract Lifecycle Management (CLM). Using CLM, CC users can securely access the most recent contract document versions. Use the Contract Document Version resource to streamline document sharing for external reviews and digital signing, ensuring access is granted only for the latest and relevant contract versions in compliance with the user's account and contract status.

### Data True-Up Resources

Keep contract documents and Salesforce records perfectly aligned by synchronizing token values between them. From the Microsoft 365 add-in, you can pull the latest data from Salesforce into the document or push the document changes back to the Salesforce record. This simple, two-way process ensures that your information is always consistent across both locations, preventing data mismatches.

### Design Document Template Resources

Manage Salesforce Contracts with Design Document Template Resources. Create, manage, and maintain contracts associated with opportunities, orders, and quotes throughout the sales cycle. Use this resource to create dynamic documents for various purposes, such as proposals and order documents, enhancing your overall document management workflow.

### External Document Resources

Manage Salesforce Contracts external documents. Users can save external documents. Get information about external document details and update.

### E-signature Resources

Manage Salesforce Contracts e-signature process. Users can view list of documents sent for e-signature and recipients. Update e-signature envelope status, notification settings and get e-signature signer roles.

## Clause Library Resources

Manage Salesforce Contracts clause library resources.

Available resources are:

| Resource   | Description  |
|--|--|
| <a href="#">/connect/clause-library/clause-category-configurations</a> | Access list of clause categories from the configuration.             |
| <a href="#">/connect/clause-library/document-clauses/fields</a>        | Get distinct document clause values for a given fieldName parameter. |
| <a href="#">/connect/clause-library/document-clause-sets</a>           | Get document clause sets as per specified filters.                   |

[Clause Category List](#)

Access list of clause categories from the configuration.

[Document Clause Fields](#)

Get distinct document clause values for a given fieldName parameter.

[Document Clause Sets](#)

Get document clause sets as per specified filters.

## Clause Category List

Access list of clause categories from the configuration.

### Resource

```
/connect/clause-library/clause-category-configurations
```

### Example URI

```
https://yourInstance.salesforce.com/services/data/66.0/connect/clause-library/clause-category-configurations
```

### Available version

57.0

### HTTP methods

GET

### Request parameters for GET

| Parameter Name | Type   | Description  | Required or Optional | Available Version |
|----------------|--------|--|----------------------|-------------------|
| name           | String | The name of the clause category.   | Required             | 57.0              |
| usageType      | String | The usage type for the clause category.<br>Valid values are: <ul style="list-style-type: none"> <li>• Contract Clause Category</li> <li>• Disclosure Category</li> </ul> | Required             | 57.0              |

### Response body for GET

[Clause Library Category Response](#)

## Document Clause Fields

Get distinct document clause values for a given fieldName parameter.

### Resource

```
/connect/clause-library/document-clauses/fields
```

### Example URI

```
https://yourInstance.salesforce.com/services/data/66.0/connect/clause-library/document-clauses/fields?clauseSetId={id}
```

**Available version**

57.0

**HTTP methods**

GET

**Query parameters for GET**

| Parameter Name | Type   | Description  | Required or Optional | Available Version |
|----------------|--------|--|----------------------|-------------------|
| clauseSetId    | String | The ID of the document clause set.   | Required             | 57.0              |
| fieldName      | String | Specifies language and name. Value is case-sensitive.<br><br>Possible values are: <ul style="list-style-type: none"> <li>Language</li> <li>Name</li> </ul> | Required             | 57.0              |
| language       | String | The language for the clauseSetId parameter.  | Required             | 57.0              |
| name           | String | The name for the clauseSetId parameter.  | Required             | 57.0              |
| status         | String | Displays records based on the status.  | Required             | 57.0              |

**Response body for GET**[Document Clause Fields Response](#)**Document Clause Sets**

Get document clause sets as per specified filters.

**Resource**

```
/connect/clause-library/document-clause-sets
```

**Example URI**

```
https://yourInstance.salesforce.com/services/data/66.0/connect/clause-library/document-clause-sets
```

**Available version**

57.0

**HTTP methods**

GET

### Query parameters for GET

| Parameter Name  | Type   | Description   | Required or Optional | Available Version |
|-----------------|--------|---|----------------------|-------------------|
| category        | String | The comma-separated category values used for filtering. | Required             | 57.0              |
| defaultLanguage | String | The comma-separated language values used for filtering. | Required             | 57.0              |
| name            | String | The name of the clause set used for filtering.          | Required             | 57.0              |
| status          | String | The comma-separated status values used for filtering.   | Required             | 57.0              |

### Response body for GET

[Document Clause Set List Response](#)

## CLM Resources

Manage Salesforce Contracts CLM resources. Check in and check out a contract document. Get and delete content document details. Execute actions for a contract based on the status. Update and create contracts. Get and create contract document versions. Get the status of document generation process. Get the list of configured templates for a usage type. Get a list of actions possible for a particular contract. Lock and unlock an active contract document version. Change a template in a contract document version.

Available resources are:

| Resource  | Description   |
|---|---|
| <a href="/connect/clm/contract-document-version/{contractDocumentVersionId}/checkIn">/connect/clm/contract-document-version/{contractDocumentVersionId}/checkIn</a>                     | Check in a contract document version using contract document version ID.  |
| <a href="/connect/clm/contract-document-version/{contractDocumentVersionId}/checkout">/connect/clm/contract-document-version/{contractDocumentVersionId}/checkout</a>                   | Check out a contract document version for modification.   |
| <a href="/connect/clm/contract-document-version/{contractDocumentVersionId}/content-documents">/connect/clm/contract-document-version/{contractDocumentVersionId}/content-documents</a> | Get content document details associated with a contract document version.   |
| <a href="/connect/clm/contract/{contractId}">/connect/clm/contract/{contractId}</a>   | Execute possible actions for a contract based on the status. Actions can trigger work flows and change the status for a contract. |
| <a href="/connect/clm/contract">/connect/clm/contract</a>   | Update and create contracts using the object ID.  |
| <a href="/connect/clm/contract/{contractId}/contract-document-version">/connect/clm/contract/{contractId}/contract-document-version</a>   | Get and create contract document versions.  |
| <a href="/connect/clm/document-generation-process/status">/connect/clm/document-generation-process/status</a>   | Get the status of document generation process for a given contract document version ID.   |
| <a href="/connect/clm/document-template">/connect/clm/document-template</a>   | Get the list of configured templates for a usage type.  |
| <a href="/connect/clm/contract/{contractId}/contract-actions">/connect/clm/contract/{contractId}/contract-actions</a>   | Get the list of actions possible for a particular contract.   |

| Resource  | Description  |
|---|--|
| <a href="#">/connect/clm/contract-document-version/{contractDocumentVersionId}/lock</a>   | Lock an active contract document version for modification. |
| <a href="#">/connect/clm/contract-document-version/{contractDocumentVersionId}/unlock</a> | Unlock latest contract document version.                   |
| <a href="#">/connect/clm/contract-document-version/{contractDocumentVersionId}</a>        | Change the template in a contract document version.        |

#### [Check In Contract Document Version](#)

Check in a contract document version using contract document version ID.

#### [Check Out Contract Document Version](#)

Check out a contract document version for modification.

#### [Content Document Details \(GET, DELETE, PATCH\)](#)

Get content document details associated with a contract document version. Delete content document details associated with a contract document version. Update the content document details associated with a contract document version.

#### [Contracts \(PATCH, POST\)](#)

Update and create contracts using the object ID.

#### [Contract Actions](#)

Execute possible actions for a contract based on the status. Actions can trigger work flows and change the status for a contract.

#### [Contract Document Version Template](#)

Change the template in a contract document version.

#### [Details of Contract Document Versions](#)

Get and create contract document versions.

#### [Document Generation Process](#)

Get the status of document generation process for a given contract document version ID.

#### [Document Template](#)

Get the list of configured templates for a usage type.

#### [List of Contract Actions](#)

Get the list of actions possible for a particular contract.

#### [Lock Document Version](#)

Lock an active contract document version for modification.

#### [Unlock Document Version](#)

Unlock latest contract document version.

## Check In Contract Document Version

Check in a contract document version using contract document version ID.

### Resource

```
/connect/clm/contract-document-version/{contractDocumentVersionId}/checkIn
```

### Available version

56.0

**HTTP methods**

PATCH

**Example for PATCH**

```
https://yourInstance.salesforce.com/services/data/v56.0/connect/clm/contract-document-version/{contractDocumentVersionId}/checkIn
```

**Response body for PATCH**[Generic Output Representation](#)**Check Out Contract Document Version**

Check out a contract document version for modification.

**Resource**

```
/connect/clm/contract-document-version/{contractDocumentVersionId}/checkout
```

**Available version**

56.0

**HTTP methods**

POST

**Example for POST**

```
https://yourInstance.salesforce.com/services/data/v66.0/connect/clm/contract-document-version/{contractDocumentVersionId}/checkout
```

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

```
{
  "templateId": "2dtxx000000004rAAA",
  "isExternalReviewImport": false,
  "externalReviewType": "OnlineMicrosoft365"
}
```

**Properties**

| Name                   | Type    | Description  | Required or Optional | Available Version |
|------------------------|---------|--|----------------------|-------------------|
| externalReviewType     | String  | Type of external review. Possible values are: <ul style="list-style-type: none"> <li>OnlineMicrosoft365</li> <li>OfflineMicrosoftWord</li> </ul> | Optional             | 60.0              |
| isExternalReviewImport | Boolean | Indicates whether the checkout is for an external review import ( <code>true</code> ) or not ( <code>false</code> ).                             | Optional             | 59.0              |
| pdfDocumentId          | String  | ID for Contract PDF document.  | Optional             | 56.0              |

| Name           | Type   | Description  | Required or Optional | Available Version |
|----------------|--------|--|----------------------|-------------------|
| templateId     | String | Template ID with key prefix 2dt used to generate document. | Required             | 56.0              |
| wordDocumentId | String | ID for Contract word document.                             | Optional             | 56.0              |

## Response body for POST

[Document Generate](#)

## Content Document Details (GET, DELETE, PATCH)

Get content document details associated with a contract document version. Delete content document details associated with a contract document version. Update the content document details associated with a contract document version.

### Resource

```
/connect/clm/contract-document-version/{contractDocumentVersionId}/content-documents
```

### Available version

56.0

### HTTP methods

GET, DELETE, PATCH

### Example for GET

```
https://yourInstance.salesforce.com/services/data/v56.0/connect/clm/contract-document-version/{0qtXXXXXXXX}/content-documents
```

### Example for DELETE

```
https://yourInstance.salesforce.com/services/data/v56.0/connect/clm/contract-document-version/{0qtXXXXXXXX}/content-documents?contentDocumentId={069XXXXXXXX}
```

### Example for PATCH

```
https://yourInstance.salesforce.com/services/data/v60.0/connect/clm/contract-document-version/{0qtXXXXXX}/content-document?contentDocumentId=069XXXXXXXX&share=true
```

### Request parameters for DELETE

| Parameter Name    | Type   | Description  | Required or Optional | Available Version |
|-------------------|--------|--|----------------------|-------------------|
| contentDocumentId | String | ID of the content document object created for an attachment. | Required             | 56.0              |

### JSON example for DELETE

```
{
  "contractDocumentVersionId": "0qtXXXXXXXX" // The contractDocumentVersionId for which
  the attachment is to be Deleted.
  "contentDocumentId" : "069XXXXXXXX" // The ContentDocumentId is ID of ContentDocument
```

```

    created for attachment
  }

```

**Response body for GET**

[Content Document List](#)

**Request parameters for PATCH**

| Parameter Name    | Type    | Description   | Required or Optional | Available Version |
|-------------------|---------|---|----------------------|-------------------|
| contentDocumentId | String  | ID of the content document whose sharing status is being updated.   | Required             | 60.0              |
| share             | Boolean | Indicates whether sharing is enabled ( <code>true</code> ) or disabled ( <code>false</code> ) for the content document. | Required             | 60.0              |

**Response body for PATCH**

[Generic Output](#) on page 200[]

**Contracts (PATCH, POST)**

Update and create contracts using the object ID.

**Resource**

```
/connect/clm/contract
```

**Available version**

56.0

**HTTP methods**

PATCH, POST

**Example for PATCH**

```
https://yourInstance.salesforce.com/services/data/v56.0/connect/clm/contract
```

**Example for POST**

```
https://yourInstance.salesforce.com/services/data/v56.0/connect/clm/contract
```

**Request body****JSON example for creating and updating contract**

```

{
  "sourceObjectId" : "006xx000001a4KaAAI",
  "templateName" : "Value1",
  "isAutoDocgenRequired" :true/false
}

```

**Properties**

| Name              | Type    | Description   | Required or Optional | Available Version |
|-------------------|---------|---|----------------------|-------------------|
| isAutoDocRequired | Boolean | Specifies whether automatic document generation is required or not. | Required             | 56.0              |
| recordTypeName    | String  | Contract record type name.  | Optional             | 56.0              |
| sourceObjectId    | String  | Source record ID.   | Required             | 56.0              |
| templateName      | String  | Document template name for document generation.                     | Optional             | 56.0              |

**Response body**

[Contract Output Response Representation](#)

**Contract Actions**

Execute possible actions for a contract based on the status. Actions can trigger work flows and change the status for a contract.

**Resource**

```
/connect/clm/contract/${contractId}
```

**Available version**

56.0

**HTTP methods**

PATCH

**Example for PATCH**


```
https://yourInstance.salesforce.com/services/data/v56.0/clm/contract/${contractId}
```


**Request body for PATCH****JSON example**

```
{
  "actionApiName" : "updateEnvelopeStatus",
  ... "actionId" : //object state action definition id,
  "actionData":{
    "isUpdateEnvelopeStatusSuccess": true
  }
}
```

**Properties**

| Name          | Type   | Description                              | Required or Optional | Available Version |
|---------------|--------|--|----------------------|-------------------|
| actionApiName | String | API name for respective contract action. | Optional             | 57.0              |

| Name       | Type                | Description   | Required or Optional | Available Version |
|------------|---------------------|---|----------------------|-------------------|
| actionId   | String              | ID for Object state Action Definition record.<br><br> <b>Note:</b> For the list of all standard actions supported, refer <a href="#">Predefined Dynamic (Contract) Actions</a> . | Optional             | 57.0              |
| actionData | Map<String, String> | Action body with supported format string.   | Optional             | 57.0              |

 **Note:** For any request, either `actionApiName` or `actionId` must be passed. If none passed, the application raises an exception.

### Response body for PATCH

[Generic Output Representation](#)

## Contract Document Version Template

Change the template in a contract document version.

### Resource

```
/connect/clm/contract-document-version/{contractDocumentVersionId}
```

### Available version

56.0

### HTTP methods

PATCH

### Example for PATCH

```
https://yourInstance.salesforce.com/services/data/v56.0/connect/clm/contract-document-version/{contractDocumentVersionId}
```

### Request body for PATCH

#### JSON example

```
{
  "templateId": "2dtxx000000004rAAA",
  "isExternalReviewImport": false,
  "externalReviewType": "OnlineMicrosoft365"
}
```

**Properties**

| Name                   | Type    | Description  | Required or Optional | Available Version |
|------------------------|---------|--|----------------------|-------------------|
| externalReviewType     | String  | Type of external review. Possible values are: <ul style="list-style-type: none"> <li>OnlineMicrosoft365</li> <li>OfflineMicrosoftWord</li> </ul> | Optional             | 60.0              |
| isExternalReviewImport | Boolean | Indicates whether the checkout is for an external review import ( <code>true</code> ) or not ( <code>false</code> ).                             | Optional             | 59.0              |
| pdfDocumentId          | String  | ID for Contract PDF document.  | Optional             | 56.0              |
| templateId             | String  | Template ID with key prefix 2dt used to generate document.   | Required             | 56.0              |
| wordDocumentId         | String  | ID for Contract word document.   | Optional             | 56.0              |

**Response body for PATCH**

[Document Generate Representation](#)

**Details of Contract Document Versions**

Get and create contract document versions.

**Resource**

```
/connect/clm/contract/{contractId}/contract-document-version
```

**Available version**

56.0

**HTTP methods**

GET, POST

**Example for GET**

```
https://yourInstance.salesforce.com/services/data/v56.0/connect/clm/contract/{contractId}/contract-document-version
```

```
https://yourInstance.salesforce.com/services/data/v56.0/connect/clm/contract/{contractId}/contract-document-version?contractDocumentVersionId={contractDocumentVersionId}
```

**Example for POST**

```
https://yourInstance.salesforce.com/services/data/v56.0/connect/clm/contract/{contractId}/contract-document-version
```

**Response body for GET**

[Contract Document Versions List Representation](#)

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

```
{
  "templateId": "2dtxx000000004rAAA",
  "isExternalReviewImport": false,
  "externalReviewType": "OnlineMicrosoft365"
}
```

**Properties**

| Name                   | Type    | Description  | Required or Optional | Available Version |
|------------------------|---------|--|----------------------|-------------------|
| externalReviewType     | String  | Type of external review. Possible values are: <ul style="list-style-type: none"> <li>OnlineMicrosoft365</li> <li>OfflineMicrosoftWord</li> </ul> | Optional             | 60.0              |
| isExternalReviewImport | Boolean | Indicates whether the checkout is for an external review import ( <code>true</code> ) or not ( <code>false</code> ).                             | Optional             | 59.0              |
| pdfDocumentId          | String  | ID for Contract PDF document.  | Optional             | 56.0              |
| templateId             | String  | Template ID with key prefix 2dt used to generate document.   | Required             | 56.0              |
| wordDocumentId         | String  | ID for Contract word document.   | Optional             | 56.0              |

**Response body for POST**

[Document Generate Representation](#)

**Document Generation Process**

Get the status of document generation process for a given contract document version ID.

**Resource**

```
/connect/clm/document-generation-process/status
```

**Available version**

56.0

**HTTP methods**

GET

**Example for GET**

```
https://yourinstancesalesforce.com/services/data/v56.0/connect/clm/document-generation-process/status?contractDocumentVersionId=<contractDocumentVersionId>
```

**Request parameters for GET**

| Parameter Name            | Type   | Description                          | Required or Optional | Available Version |
|---------------------------|--------|--------------------------------------|----------------------|-------------------|
| contractDocumentVersionId | String | ID of the contract document version. | Required             | 56.0              |

**Response body for GET**

[Document Generation Process Status Representation](#)

**Document Template**

Get the list of configured templates for a usage type.

**Resource**

```
/connect/clm/document-template
```

**Available version**

56.0

**HTTP methods**

GET

**Example for GET**

```
https://yourInstance.salesforce.com/services/data/v56.0/connect/clm/document-template?usageType=<usageType>&isActive=<true/false>&type=<>
```

**Request parameters for GET**

| Parameter Name | Type    | Description  | Required or Optional | Available Version |
|----------------|---------|--|----------------------|-------------------|
| contractId     | String  | ID of the contract document.                                 | Optional             | 55.0              |
| isActive       | Boolean | Status of the template.                                      | Required             | 55.0              |
| type           | String  | Format of the contract document. For example, MicrosoftWord. | Required             | 55.0              |
| usageType      | String  | Usage type. For example, Contract_Life_Cycle_Management.     | Required             | 55.0              |

**Response body for GET**

[Template List Representation](#)

**List of Contract Actions**

Get the list of actions possible for a particular contract.

**Resource**

```
/connect/clm/contract/{contractId}/contract-actions
```

**Available version**

56.0

**HTTP methods**

GET

**Example for GET**

```
https://yourInstance.salesforce.com/services/data/v56.0/connect/clm/contract/{contractId}/contract-actions
```

**Response body for GET**[Contract Action List Representation](#)

## Lock Document Version

Lock an active contract document version for modification.

**Resource**

```
/connect/clm/contract-document-version/{contractDocumentVersionId}/lock
```

**Available version**

56.0

**HTTP methods**

PATCH

**Example for PATCH**

```
https://yourInstance.salesforce.com/services/data/v56.0/connect/clm/contract-document-version/{contractversionid}/lock
```

**Response body for PATCH**[Generic Output Representation](#)

## Unlock Document Version

Unlock latest contract document version.

**Resource**

```
/connect/clm/contract-document-version/{contractDocumentVersionId}/unlock
```

**Available version**

56.0

**HTTP methods**

PATCH

**Example for PATCH**

```
https://yourInstance.salesforce.com/services/data/v56.0/connect/clm/contract-document-version/{contractDocumentVersionId}/unlock
```

**Response body for PATCH**[Generic Output Representation](#)

## Context Mapping Extraction Resources

Manage custom mappings used in the extraction flow of documents before their fields are sent for extraction. Use the Extraction Context Mapping resource to map extracted field values to their own set of custom fields relevant to their contract types and business cases.

Available resource is:

| Resource   | Description  |
|--|--|
| <a href="#">/connect/clm/extraction-context-mappings</a><br>(POST)   | Create extraction context-mapping details that show how extracted data is associated with Salesforce fields.   |
| <a href="#">/connect/clm/extraction-context-mappings/{contextUseCaseMappingId}</a><br>(DELETE, GET, PATCH) | Delete extraction context mapping details based on the specified context use case mapping ID. Get extraction context mapping details based on the specified context use case mapping ID. Update extraction context mapping details based on the specified context use case mapping ID. |

#### Extraction Context Mapping (POST)

Create extraction context-mapping details that show how extracted data is associated with Salesforce fields.

#### Extraction Context Mappings (DELETE, GET, PATCH)

Delete extraction context mapping details based on the specified context use case mapping ID. Get extraction context mapping details based on the specified context use case mapping ID. Update extraction context mapping details based on the specified context use case mapping ID.

### Extraction Context Mapping (POST)

Create extraction context-mapping details that show how extracted data is associated with Salesforce fields.

#### Resource

```
/connect/clm/extraction-context-mappings
```

#### Example

```
https://yourInstance.salesforce.com/services/data/v66.0/connect/clm/extraction-context-mappings
```

#### Available version

61.0

#### HTTP methods

POST

#### Request body for POST

##### JSON example

```
{
  "ContextUseCaseMapping": {
    "templateName": "ContractExtractionTemplate",
    "contextDefinitionDeveloperName": "ContractExtractionContextDefinition",
    "mappingName": "ContractExtractionMappingName",
    "targetObject": "Contract",
    "recordType": "CLM"
  },
  "contextAttributeMapping": [
    {
      "attributeId": "11nxx000001hOozAAE",
      "description": "extract startDate from the document"
    }
  ]
}
```

```

    },
    {
      "attributeId": "11nxx000001hOozAAV",
      "description": "extract startDate from the document"
    },
    {
      "attributeId": "11nxx000001hOozAAR",
      "description": "extract startDate from the document"
    }
  ]
}

```

### Properties

| Name                          | Type   | Description   | Required or Optional | Available Version |
|-------------------------------|--|---|----------------------|-------------------|
| context<br>AttributeMapping   | <a href="#">Extraction Context Attribute Mapping Input[]</a> | List of attributes and their mappings.                    | Yes                  | 61.0              |
| context<br>UseCase<br>Mapping | <a href="#">Extraction Context Use Case Mapping Input</a>    | Details of the use case for which the mapping is defined. | Yes                  | 61.0              |

### Response body for POST

[Extraction Context Mappings](#)

### Extraction Context Mappings (DELETE, GET, PATCH)

Delete extraction context mapping details based on the specified context use case mapping ID. Get extraction context mapping details based on the specified context use case mapping ID. Update extraction context mapping details based on the specified context use case mapping ID.

#### Resource

```
/connect/clm/extraction-context-mappings/{contextUseCaseMappingId}
```

#### Available version

61.0

#### HTTP methods

DELETE GET PATCH

#### Example for DELETE

```
https://yourInstance.salesforce.com/services/data/v66.0/connect/clm/extraction-context-mappings/11jSB000002XIWjYAO
```

#### Example for GET

```
https://yourInstance.salesforce.com/services/data/v66.0/connect/clm/extraction-context-mappings/11jSB000002XIWjYAO
```

#### Example for PATCH

```
https://yourInstance.salesforce.com/services/data/v66.0/connect/clm/extraction-context-mappings/11jSB000002XIWjYAO
```

**Response body for GET**[Extraction Context Mapping](#)**Request body for PATCH****JSON example**

```
{
  "ContextUseCaseMapping": {
    "templateName": "ContractExtractionTemplate",
    "contextDefinitionDeveloperName": "ContractExtractionContextDefinition",
    "mappingName": "ContractExtractionMappingName",
    "targetObject": "Contract",
    "recordType": "CLM"
  },
  "contextAttributeMapping": [
    {
      "attributeId": "11nxx000001hOozAAE",
      "description": "extract startDate from the document"
    },
    {
      "attributeId": "11nxx000001hOozAAV",
      "description": "extract startDate from the document"
    },
    {
      "attributeId": "11nxx000001hOozAAR",
      "description": "extract startDate from the document"
    }
  ]
}
```

**Properties**

| Name                    | Type   | Description   | Required or Optional | Available Version |
|-------------------------|--|---|----------------------|-------------------|
| contextAttributeMapping | <a href="#">Extraction Context Attribute Mapping Input[]</a> | List of attributes and their mappings.                    | Yes                  | 61.0              |
| contextUseCaseMapping   | <a href="#">Extraction Context Use Case Mapping Input</a>    | Details of the use case for which the mapping is defined. | Yes                  | 61.0              |

**Response body for PATCH**[Extraction Context Mappings](#)**Customer Community Resources**

Manage document control for Customer Community (CC) users by using Salesforce's Contract Lifecycle Management (CLM). Using CLM, CC users can securely access the most recent contract document versions. Use the Contract Document Version resource to streamline document sharing for external reviews and digital signing, ensuring access is granted only for the latest and relevant contract versions in compliance with the user's account and contract status.

Available resources are:

| Resource   | Description   |
|--|---|
| <a href="#">/connect/clm/cc/contract/{contractId}/contract-document-version (GET)</a>                      | Get latest details of a contract document version based on a contract ID.   |
| <a href="#">/connect/clm/cc/documentRecipientContractDocumentVersion/{contractDocumentVersionId} (GET)</a> | Fetch recipient status for contract document versions to monitor e-signature progress and identify decline reasons. |

#### [Contract Document Version for Customer Community User \(GET\)](#)

Get latest details of a contract document version based on a contract ID.

#### [Document Recipient \(GET\)](#)

Fetch recipient status for contract document versions to monitor e-signature progress and identify decline reasons.

### Contract Document Version for Customer Community User (GET)

Get latest details of a contract document version based on a contract ID.

#### Resource

```
/connect/clm/cc/contract/{contractId}/contract-document-version
```

#### Resource example

```
https://yourInstance.salesforce.com/services/data/v66.0/connect/clm/cc/contract/{contractId}/contract-document-version?showDetails=true
```

#### Available version

60.0

#### HTTP methods

GET

#### Request parameters for GET

| Parameter Name | Type    | Description   | Required or Optional | Available Version |
|----------------|---------|---|----------------------|-------------------|
| showDetails    | Boolean | Indicates whether to include detailed information about attachments in the response. ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> . | Required             | 60.0              |

#### Response body for GET

[Contract Document Version CC Response](#)

### Document Recipient (GET)

Fetch recipient status for contract document versions to monitor e-signature progress and identify decline reasons.

#### Resource

```
/connect/clm/cc/documentRecipient
```

**Example**

```
https://yourInstance.salesforce.com/services/data/v66.0/connect/clm/cc/documentRecipient?contractDocumentVersion=11nx000001hOzAAE
```

**Available version**

61.0

**HTTP methods**

GET

**Request parameters for GET**

| Parameter Name            | Type   | Description                                 | Required or Optional | Available Version |
|---------------------------|--------|---|----------------------|-------------------|
| contractDocumentVersionId | String | Record ID of the contract document version. | Required             | 61.0              |

**Response body for GET**

[Document Recipient Status](#)

**Data True-Up Resources**

Keep contract documents and Salesforce records perfectly aligned by synchronizing token values between them. From the Microsoft 365 add-in, you can pull the latest data from Salesforce into the document or push the document changes back to the Salesforce record. This simple, two-way process ensures that your information is always consistent across both locations, preventing data mismatches.

The available resource is:

| Resource   | Description   |
|--|---|
| <a href="#">/connect/content-link/load</a>             | Fetches the content data for a specified reference ID or set of content link IDs.                   |
| <a href="#">/connect/content-link/data-sync</a> (POST) | Synchronize and save the updated values for a specified reference ID and a set of content link IDs. |

[Content Link Load \(POST\)](#)

Fetches the content data for a specified reference ID or set of content link IDs.

[Data Sync \(POST\)](#)

Synchronize and save the updated values for a specified reference ID and a set of content link IDs.

**Content Link Load (POST)**

Fetches the content data for a specified reference ID or set of content link IDs.

**Resource**

```
/connect/content-link/load
```

**Example POST**

```
https://yourInstance.salesforce.com/services/data/v66.0/connect/content-link/load
```

**Available version**

62.0

**HTTP methods**

POST

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

```
{
  "referenceObjectId": "a0X4W00000X8jklUAB",
  "isBulkRequest": "false",
  "contentLinkIds": [
    "0D56A000008yhfSAAQ",
    "0D56A000008yhgTABQ"
  ]
}
```

**Properties**

| Name              | Type     | Description  | Required or Optional | Available Version |
|-------------------|----------|--|----------------------|-------------------|
| contentLinkIds    | String[] | List of the content link IDs to fetch the data.  | Optional             | 62.0              |
| isBulkRequest     | Boolean  | Indicates whether fields associated with the same object ID are grouped and fetched together in a single bulk request ( <code>true</code> ) or not ( <code>false</code> ). | Optional             | 66.0              |
| referenceObjectId | String   | ID of the reference object to retrieve the content data.   | Optional             | 62.0              |

**Response body for POST**
[Content Link List](#)
**Data Sync (POST)**

Synchronize and save the updated values for a specified reference ID and a set of content link IDs.

**Resource**

```
/connect/content-link/data-sync
```

**Resource example**

```
https://yourInstance.salesforce.com/services/data/v66.0/connect/content-link/data-sync
```

**Available version**

65.0

**HTTP methods**

POST

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

```
{
  "referenceObjectId": "069xx0000004CsCAAU",
  "partialCommit": "false",
  "isBulkRequest": "false",
  "contentLinkDetailsList": [
    {
      "contentLinkId": "6UPVW00000003CQ4AY",
      "contentValue": "Contract Description for JSON"
    },
    {
      "contentLinkId": "6UPxx0000004CCGGA2",
      "contentValue": "3"
    }
  ]
}
```

**Properties**

| Name                   | Type   | Description   | Required or Optional | Available Version |
|------------------------|--|---|----------------------|-------------------|
| contentLinkDetailsList | <a href="#">Content Link Details Input[]</a> | List of content link records with their IDs and updated values. Each object includes a <code>contentLinkId</code> and a <code>contentValue</code> property value.                 | Required             | 65.0              |
| isBulkRequest          | Boolean                                      | Indicates whether fields associated with the same object ID are grouped and fetched together in a single bulk request ( <code>true</code> ) or not ( <code>false</code> ).        | Optional             | 66.0              |
| partialCommit          | Boolean                                      | Indicates whether successful records should be committed in case of partial errors ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> . | Optional             | 65.0              |
| referenceObjectId      | String                                       | ID of the target Salesforce object that must be updated, such as a Contract record.   | Optional             | 65.0              |

**Response body for POST**[Content Link Data Sync](#)

## Design Document Template Resources

Manage Salesforce Contracts with Design Document Template Resources. Create, manage, and maintain contracts associated with opportunities, orders, and quotes throughout the sales cycle. Use this resource to create dynamic documents for various purposes, such as proposals and order documents, enhancing your overall document management workflow.

Available resource is:

| Resource  | Description  |
|---|--|
| <a href="/connect/docgen/document-templates">/connect/docgen/document-templates</a> | Access document template actions, including template creation with the Document Template Designer. |

### Document Templates (GET, PATCH, POST)

Access document template actions, including template creation with the Document Template Designer.

## Document Templates (GET, PATCH, POST)

Access document template actions, including template creation with the Document Template Designer.

### Resource

```
/connect/docgen/document-templates
```

### GET Example

```
https://yourInstance.salesforce.com/services/data/v66.0/connect/docgen/document-templates?offset=${offset}&limit=${limit}&searchString=${searchString}
```

### PATCH Example

```
https://yourInstance.salesforce.com/services/data/v66.0/connect/docgen/document-templates?documentTemplateId=${documentTemplateId}
```

### POST Example

```
https://yourInstance.salesforce.com/services/data/v66.0/connect/docgen/document-templates?documentTemplateId=${documentTemplateId}&action=${action}
```

### Available version

60.0

### HTTP methods

GET, PATCH, POST

### Request parameters for GET

| Parameter Name         | Type   | Description   | Required or Optional | Available Version |
|------------------------|--------|---|----------------------|-------------------|
| <code>cloneOnly</code> | String | Filters the results to return only the document templates that can be cloned. | Optional             | 66.0              |
| <code>limit</code>     | String | Number of document templates per page. The default value is 20.               | Optional             | 60.0              |
| <code>offset</code>    | String | Number of records to skip. The default value is 0.                            | Optional             | 60.0              |

| Parameter Name | Type   | Description  | Required or Optional | Available Version |
|----------------|--------|--|----------------------|-------------------|
| searchString   | String | Search term that is used to retrieve a list of document templates. | Optional             | 60.0              |
| type           | String | Filters the list of document templates by the file type.           | Optional             | 66.0              |
| usageType      | String | Filters the list of document templates by the usage type.          | Optional             | 66.0              |

**Response body for GET**[Document Template List](#)**Request body for PATCH****JSON example**

```
{
  "isActive": "false",
  "status": "Draft",
  "documentGenerationMechanism": "ClientSide",
  "extractOmniDataTransformName": "Extractor",
  "mapperOmniDataTransformName": "Mapper",
  "shouldDisplayUnmappedToken": "false",
  "tokenList": "token1,token2,token3",
  "tokenMappingMethodType": "ContextService",
  "contextDefinitionName": "QuoteProposal",
  "contextMappingName": "QuoteToContextMapping",
  "customClassName": "QuoteBundleTransformer",
  "contextFilterName": "QuoteWithLargeQtyLineItems",
  "usageType": "Contract_Lifecycle_Management",
  "contentDocumentId": "069xxxxxxxxxxxxxxxx"
}
```

**Properties**

| Name                      | Type   | Description   | Required or Optional  | Available Version |
|---------------------------|--------|---|---|-------------------|
| content<br>DocumentId     | String | ID of the document associated with a document template.   | Optional  | 60.0              |
| contextDefinition<br>Name | String | Name of the context definition that contains the mapping details used for extraction in the Context Service token mapping type. | Required if the <code>tokenMappingMethodType</code> is set to <code>ContextService</code> . | 64.0              |
| contextMapping<br>Name    | String | Name of the context mapping used for extraction in the Context Service token mapping type.                                      | Required if the <code>tokenMappingMethodType</code> is set to <code>ContextService</code> . | 64.0              |

| Name                                      | Type    | Description   | Required or Optional | Available Version |
|---|---------|---|----------------------|-------------------|
| <code>contextFilterName</code>            | String  | Name of the context filter that's used to filter, order, or limit the data extracted from the context service at run time. This property is available only when <code>tokenMappingMethodType</code> property value is <code>ContextService</code> . | Optional             | 66.0              |
| <code>customClassName</code>              | String  | Name of a custom Apex class that's used to transform token data before document generation. This property is available only when <code>tokenMappingMethodType</code> property value is <code>ContextService</code> .                                | Optional             | 66.0              |
| <code>documentGenerationMechanism</code>  | String  | Specifies the method for generating the document. Possible values are: <ul style="list-style-type: none"> <li><code>Client-side</code></li> <li><code>Server-side</code></li> </ul> The default value is <code>Client-side</code> .                 | Optional             | 60.0              |
| <code>extractOmniDataTransformName</code> | String  | Name of the OmniDataTransform bundle of the extract type.   | Optional             | 60.0              |
| <code>isActive</code>                     | Boolean | Indicates whether the document template is set to active ( <code>true</code> ) or inactive ( <code>false</code> ).  | Optional             | 60.0              |
| <code>mapperOmniDataTransformName</code>  | String  | Name of the OmniDataTransform bundle of the mapper type.  | Optional             | 60.0              |
| <code>shouldDisplayUnmappedToken</code>   | Boolean | Indicates whether the document template unmapped tokens be displayed ( <code>true</code> ) or not ( <code>false</code> ).   | Optional             | 60.0              |
| <code>status</code>                       | String  | Status to be set for the document template.   | Optional             | 60.0              |
| <code>tokenList</code>                    | String  | List of tokens present in the document template.  | Optional             | 60.0              |

| Name                       | Type   | Description  | Required or Optional | Available Version |
|----------------------------|--------|--|----------------------|-------------------|
| tokenMapping<br>MethodType | String | Processing method for data that can originate from the same source object.<br>Possible values are: <ul style="list-style-type: none"> <li>ContextService</li> <li>OmniDataTransform</li> </ul> The default value is ContextService | Required             | 60.0              |
| usageType                  | String | Usage type of the document template.   | Optional             | 60.0              |

### Request parameters for PATCH

| Parameter Name     | Type   | Description  | Required or Optional | Available Version |
|--------------------|--------|--|----------------------|-------------------|
| documentTemplateId | String | ID of the document template for operations like cloning or creating a new version. | Required             | 60.0              |
| documentTemplate   | Object | Specifies the details to modify an existing document template.                     | Optional             | 64.0              |

### Response body for PATCH

[Document Template](#)

### Request body for POST

#### JSON example

```
{
  "name": "TemplateName",
  "type": "MicrosoftWord/MicrosoftPowerpoint/Microsoft365Word",
  "tokenMappingMethodType": "OmniDataTransform",
  "tokenMappingType": "JSON",
  "extractOmniDataTransformName": "ExtractName",
  "mapperOmniDataTransformName": "MapperName",
  "contentDocumentId": "069xx0000004CyeAAE",
  "documentGenerationMechanism": "ServerSide",
  "usageType": "Contract_Lifecycle_Management",
  "tokenList": "token1,token2,token3"
}
```

This example shows a sample request with ContextService as the value of the tokenMappingMethodType property.

```
{
  "name": "TemplateName",
  "type": "MicrosoftWord/MicrosoftPowerpoint/Microsoft365Word",
  "tokenMappingMethodType": "ContextService",
  "contextDefinitionName": "QuoteProposal",
}
```

```

"contextMappingName": "QuoteToContextMapping",
"customClassName": "QuoteBundleTransformer",
"contextFilterName": "QuoteWithLargeQtyLineItems",
"tokenMappingType": "JSON",
"extractOmniDataTransformName": "ExtractName",
"mapperOmniDataTransformName": "MapperName",
"contentDocumentId": "069xx0000004CyeAAE",
"documentGenerationMechanism": "ClientSide",
"usageType": "Contract_Lifecycle_Management",
"tokenList": "token1,token2,token3"
}

```

### Properties

| Name                        | Type   | Description   | Required or Optional  | Available Version |
|-----------------------------|--------|---|---|-------------------|
| contentDocumentId           | String | ID of the Document associated with a document template.   | Optional  | 60.0              |
| contextDefinitionName       | String | Name of the context definition that contains the mapping details used for extraction in the Context Service token mapping type.   | Required if the <code>tokenMappingType</code> is set to <code>ContextService</code> . | 64.0              |
| contextMappingName          | String | Name of the context mapping used for extraction in the Context Service token mapping type.  | Required if the <code>tokenMappingType</code> is set to <code>ContextService</code> . | 64.0              |
| contextFilterName           | String | Name of the context filter that's used to filter, order, or limit the data extracted from the context service at run time. This property is available only when the <code>tokenMappingMethodType</code> property value is <code>ContextService</code> . | Optional  | 66.0              |
| customClassName             | String | Name of a custom Apex class that's used to transform token data before document generation. This property is available only when the <code>tokenMappingMethodType</code> property value is <code>ContextService</code> .                                | Optional  | 66.0              |
| documentGenerationMechanism | String | Specifies the method for generating the document. Possible values are: <ul style="list-style-type: none"> <li>Client-side</li> <li>Server-side</li> </ul> The default value is <code>Client-side</code> .   | Optional  | 60.0              |

| Name                        | Type   | Description  | Required or Optional | Available Version |
|-----------------------------|--------|--|----------------------|-------------------|
| extractTransformName        | String | Name of the OmniDataTransform bundle of the extract type.  | Optional             | 60.0              |
| mapperOmniDataTransformName | String | Name of the OmniDataTransform bundle of the mapper type.   | Optional             | 60.0              |
| name                        | String | Name of the document template.   | Required             | 60.0              |
| tokenList                   | String | List of tokens present in the document template.   | Optional             | 60.0              |
| tokenMappingMethodType      | String | Processing method for the data that can originate from same source object. Possible values are: <ul style="list-style-type: none"> <li>ContextService</li> <li>OmniDataTransform</li> </ul> The default value is ContextService. | Required             | 60.0              |
| tokenMappingType            | String | Mapping type for tokens of the document template.  | Required             | 60.0              |
| type                        | String | Type of document template.   | Required             | 60.0              |
| usageType                   | String | Usage type of the document template.   | Optional             | 60.0              |

### Request parameters for POST

| Parameter Name     | Type   | Description   | Required or Optional | Available Version |
|--------------------|--------|---|----------------------|-------------------|
| action             | String | Action to be performed on the document template. Possible values are: <ul style="list-style-type: none"> <li>Clone</li> <li>NewVersion</li> </ul> | Optional             | 60.0              |
| documentTemplate   | Object | Specifies the details of a new document template resource.  | Optional             | 64.0              |
| documentTemplateId | String | ID of the document template for operations like cloning or creating a new version.  | Optional             | 60.0              |

### Response body for POST

[Document Template](#)

## External Document Resources

Manage Salesforce Contracts external documents. Users can save external documents. Get information about external document details and update.

Available resources are:

| Resource  | Description   |
|---|---|
| <a href="#">/connect/external-document/save</a> | Save external documents.                                    |
| <a href="#">/connect/external-document</a>      | Get information about external document details and update. |

### [External Documents Save](#)

Save external documents.

### [External Documents \(GET, POST\)](#)

Get information about external document details and update.

### [External Document Review \(GET\)](#)

Retrieve external document for review using latest contract document version.

## External Documents Save

Save external documents.

### Resource

```
/connect/external-document/save
```

### Available version

58.0

### Example for PUT

```
https://yourInstance.salesforce.com/services/data/v58.0/connect/external-document?externalDocumentId=${externalDocumentId}&isAsync=false
```

### HTTP methods

PUT

### Request body for PUT

#### JSON example

```
{
  "externalDocumentId" : "id",
  "isAsync" : "false",
  "metadata": {
    "sections" : [
      {
        "guid": "guid1",
        "name": "test1",
        "isReadOnly": false
      },
      {
        "guid": "guid2",
```

```

        "name": "test2",
        "isReadOnly": false
      }
    ],
    "objectReferences" :[
      {
        "objectType": "clause",
        "objectId": "clauseid1",
        "usages": {
          "sectionIds": [
            "guid1",
            "guid2"
          ],
          "usedInDocument": true
        }
      },
      {
        "objectType": "clause",
        "objectId": "clauseid2",
        "usages": {
          "sectionIds": [
            "guid1",
            "guid2"
          ],
          "usedInDocument": false // points to if this object is used in
document as well without sections
        }
      }
    ]
  }
}

```

### Properties

| Name               | Type                                       | Description                 | Required or Optional | Available Version |
|--------------------|--|-----------------------------|----------------------|-------------------|
| externalDocumentId | String                                     | ID of an external document. | Required             | 58.0              |
| isAsync            | Boolean                                    | Is Async                    | Required             | 58.0              |
| metadata           | <a href="#">External Document Metadata</a> | Metadata                    | Optional             | 58.0              |

### Response body for PUT

[Save External Document Representation](#)

### External Documents (GET, POST)

Get information about external document details and update.

### Resource

```
/connect/external-document
```

**Example URI**

```
https://yourInstance.salesforce.com/services/data/v58.0/connect/external-document
```

**Available version**

58.0

**Example for GET**

**Note:** You can access the external document details using the reference object such as document template, contract document version or using the external document ID.

```
https://yourInstance.salesforce.com/services/data/v58.0/connect/external-document?externalDocumentId=${externalDocumentId}
```

```
https://yourInstance.salesforce.com/services/data/v58.0/connect/external-document?refObjectId=${refObjectId}
```

```
https://yourInstance.salesforce.com/services/data/v58.0/connect/external-document?externalDocumentId=${externalDocumentId}&refObjectId=${refObjectId}
```

**Example for POST**

```
https://yourInstance.salesforce.com/services/data/v58.0/connect/external-document
```

**HTTP methods**

GET, POST

**Query parameters for GET**

| Parameter Name     | Type   | Description                             | Required or Optional | Available Version |
|--------------------|--------|---|----------------------|-------------------|
| externalDocumentId | String | ID of an external document record.      | Required             | 58.0              |
| refObjectId        | String | ID for the salesforce reference object. | Required             | 58.0              |

**Response body for GET**[External Document Output](#)**Request body for POST****JSON example**

```
{
  "refObjectId": "",
  "contentversionId": "",
  "documentNamePrefix": "namespaceprefix",
  "isAsync": true
}
```

**Properties**

| Name               | Type   | Description  | Required or Optional | Available Version |
|--------------------|--------|--|----------------------|-------------------|
| contentVersionId   | String | Content version ID of the document using which new external document is created.     | Required             | 58.0              |
| documentNamePrefix | String | Document name prefix, which is required to name the newly created external document. | Optional             | 58.0              |
| isAsync            | String | Determines the way the external document gets created.                               | Optional             | 58.0              |
| refObjectId        | String | ID of the reference object. This can be either a document template or a contract ID. | Optional             | 58.0              |

**Response body for POST**

[External Document Creation Output](#)

**External Document Review (GET)**

Retrieve external document for review using latest contract document version.

**Resource**

```
/connect/clm/cc/external-document
```

**Example**

```
https://yourInstance.salesforce.com/services/data/v66.0/connect/clm/cc/external-document?contractDocumentVersion=11nxz000001hOozAAE
```

**Available version**

61.0

**HTTP methods**

GET

**Request parameters for GET**

| Parameter Name            | Type   | Description                                  | Required or Optional | Available Version |
|---------------------------|--------|--|----------------------|-------------------|
| contractDocumentVersionId | String | Record ID for the contract document version. | Required             | 61.0              |

**Response body for GET**

[External Document Review CC](#)

## E-signature Resources

Manage Salesforce Contracts e-signature process. Users can view list of documents sent for e-signature and recipients. Update e-signature envelope status, notification settings and get e-signature signer roles.

Available resources are:

| Resource   | Description   |
|--|---|
| <a href="#">/connect/e-sign/signature-requests/{sourceObjectId}/envelope/send</a>    | Send document envelope to vendor for e-signature.   |
| <a href="#">/connect/e-sign/documents</a>  | View a list of documents sent for e-signature.      |
| <a href="#">/connect/e-sign/signature-requests/{sourceObjectId}/envelopes/status</a> | Update e-signature envelope status.                 |
| <a href="#">/connect/e-sign/signature-requests/{sourceObjectId}/envelopes/void</a>   | Expire or void envelopes associated with an object. |
| <a href="#">/connect/e-sign/recipients</a>   | Get list of e-signature recipients.                 |
| <a href="#">/connect/e-sign/notification-settings</a>                                | Get e-signature notification settings.              |
| <a href="#">/connect/e-sign/signer-roles</a>   | Get e-signature signer roles.                       |

### [E-signature Document List](#)

View a list of documents sent for e-signature.

### [E-signature Envelope](#)

Send document envelope to vendor for e-signature.

### [E-signature Envelope Status](#)

Update e-signature envelope status.

### [E-signature Envelope Void](#)

Expire or void envelopes associated with an object.

### [E-signature Notification](#)

Get e-signature notification settings.

### [E-signature Recipients](#)

Get list of e-signature recipients.

### [E-signature Signer Roles](#)

Get e-signature signer roles.

## E-signature Document List

View a list of documents sent for e-signature.

### Resource

```
/connect/e-sign/documents
```

### Available version

56.0

**HTTP methods**

GET

**Example**

```
https://yourInstance.salesforce.com/services/data/v56.0/connect/e-sign/documents?sourceObjectId=<sourceObjectId>&documentSelector=<customClassName>
```

**Request parameters for GET**

| Parameter Name   | Type   | Description  | Required or Optional | Available Version |
|------------------|--------|--|----------------------|-------------------|
| documentSelector | String | Specifies which class is executed. Use this when you want to define a custom class other than the default class or the one already defined for DocuSignDocumentSelector. | Optional             | 56.0              |
| sourceObjectId   | String | Record ID of the object.   | Required             | 56.0              |

**Response body for GET**[Document List Response](#)**E-signature Envelope**

Send document envelope to vendor for e-signature.

**Resource**

```
/connect/e-sign/signature-requests/{sourceObjectId}/envelope/send
```

**Available version**

56.0

**HTTP methods**

POST

**Example**

```
https://yourInstance.salesforce.com/services/data/v56.0/connect/e-sign/signature-requests/{sourceObjectId}/envelope/send
```

**JSON example**

```
{
  "emailSettings" : { // API: required, UI: required
    "emailSubject": "", // API: required,
    "emailBody": ""
  },
  "vendor": "DocuSign", // API: required,
  "recipients": { // API: required,
    "signers": [ // API: required,
      "name": "", // API: required,
      "email": "", // API: required,
      "routingOrder": "", // API: required,
      "recipientId": "", // API: required,
      "signerRole": "", // API: required,
```

```

        "recipientType": "", // API: required,
        "recipientLocale": "",
        "phone": "",
        "emailNotification": {
            "emailSubject": "",
            "emailBody": "",
            "supportedLanguage": ""
        }
    }
},
"inPersonSigners": [{
    "name": "",
    "email": "",
    "routingOrder": "",
    "recipientId": "",
    "signerRole": "",
    "emailNotification": {
        "emailSubject": "",
        "emailBody": "",
        "supportedLanguage": ""
    }
}
],
"certifiedDeliveries": [{
    "name": "",
    "email": "",
    "routingOrder": "",
    "recipientId": "",
    "signerRole": "",
    "emailNotification": {
        "emailSubject": "",
        "emailBody": "",
        "supportedLanguage": ""
    }
}
],
"carbonCopies": [{
    "name": "",
    "email": "",
    "routingOrder": "",
    "recipientId": "",
    "signerRole": "",
    "emailNotification": {
        "emailSubject": "",
        "emailBody": "",
        "supportedLanguage": ""
    }
}
]
},
"documents": [{ // API: required
    "name": "", // API: required,
    "sourceId": "", // API: required,
    "fileExtension": "", // API: required,

```

```

        "sourceType": "", // API: required,
        "documentId": "" // API: required,
    }
  ],
  "notificationSettings": {
    "useAccountDefaults": "",
    "reminders": {
      "reminderEnabled": "",
      "reminderDelay": "",
      "reminderFrequency": ""
    },
    "expirations": {
      "expireEnabled": "",
      "expireAfter": "",
      "expireWarn": ""
    }
  }
}

```

### Properties

| Name                 | Type   | Description                  | Required or Optional | Available Version |
|----------------------|--|------------------------------|----------------------|-------------------|
| documents            | <a href="#">Envelope Send Documents Request[]</a>    | Array of documents to send.  | Required             | 56.0              |
| emailSettings        | <a href="#">Envelope Send Email Settings Request</a> | Email settings.              | Required             | 56.0              |
| notificationSettings | <a href="#">Envelope Send Notification Request</a>   | Notification settings.       | Optional             | 56.0              |
| parentId             | String   | ID of the parent object.     | Optional             | 56.0              |
| recipients           | <a href="#">Envelope Send Recipients Request</a>     | Map of different recipients. | Required             | 56.0              |
| vendor               | String   | Vendor name.                 | Required             | 56.0              |

### Request parameters for POST

| Parameter Name | Type   | Description  | Required or Optional | Available Version |
|----------------|--------|--|----------------------|-------------------|
| envelope       | Object | E-signature envelope containing information of the document. | Required             | 56.0              |

### Response body for POST

[Envelope Send Response](#)

## E-signature Envelope Status

Update e-signature envelope status.

### Resource

```
/connect/e-sign/signature-requests/{sourceObjectId}/envelopes/status
```

### Available version

56.0

### HTTP methods

PATCH

### Example

```
https://yourInstance.salesforce.com/services/data/v56.0/connect/e-sign/signature-requests/{sourceObjectId}/envelopes/status
```

### Response body for PATCH

[Envelope Status List Response](#)

## E-signature Envelope Void

Expire or void envelopes associated with an object.

### Resource

```
/connect/e-sign/signature-requests/{sourceObjectId}/envelopes/void
```

### Available version

56.0

### HTTP methods

PATCH

### Example

```
https://yourInstance.salesforce.com/services/data/v56.0/connect/e-sign/signature-requests/{sourceObjectId}/envelopes/void
```

### JSON example

```
{
  "voidedReason": "", //required
  "senderEmail": ""
}
```

### Properties

| Name         | Type   | Description  | Required or Optional | Available Version |
|--------------|--------|--|----------------------|-------------------|
| senderEmail  | String | Refers to the email of the user who initiated the voiding. | Optional             | 56.0              |
| voidedReason | String | Reason for which the envelope is being voided.             | Required             | 56.0              |

**Response body for PATCH**[Envelope Void Response](#)**E-signature Notification**

Get e-signature notification settings.

**Resource**`/connect/e-sign/notification-settings`**Available version**

56.0

**HTTP methods**

GET

**Example**`https://yourInstance.salesforce.com/services/data/v56.0/connect/e-sign/notification-settings?sourceObjectId=<sourceObjectId>`**Request parameters for GET**

| Parameter Name | Type   | Description                | Required or Optional | Available Version |
|----------------|--------|----------------------------|----------------------|-------------------|
| sourceObjectId | String | Object ID of the document. | Required             | 56.0              |

**Response body for GET**[Notification Setting Response](#)**E-signature Recipients**

Get list of e-signature recipients.

**Resource**`/connect/e-sign/recipients`**Available version**

56.0

**HTTP methods**

GET

**Example**`https://yourInstance.salesforce.com/services/data/v56.0/connect/e-sign/recipients?sourceObjectId=<sourceObjectId>&recipientSelector=<recipientCustomClassName>`

**Request parameters for GET**

| Parameter Name    | Type   | Description  | Required or Optional | Available Version |
|-------------------|--------|--|----------------------|-------------------|
| recipientSelector | String | Create a list of recipients that receive the DocuSign envelope for signing or viewing for a custom object. | Optional             | 56.0              |
| sourceObjectId    | String | Object Id of the document.   | Optional             | 56.0              |

**Response body for GET**

[Recipient List Response](#)

**E-signature Signer Roles**

Get e-signature signer roles.

**Resource**

```
/connect/e-sign/signer-roles
```

**Available version**

56.0

**HTTP methods**

GET

**Example for GET**

```
https://yourInstance.salesforce.com/services/data/v56.0/connect/e-sign/signer-roles
```

**Response body for GET**

[E-Signature Signer Roles](#)

**Request Bodies**

Here's a list of Salesforce Contracts API request bodies.

[Content Link Input](#)

Input representation of the request to fetch the content token data from the ContentLink object.

[Content Link Data Sync Input](#)

Input representation of the entire request to synchronize token data from a document to sObjects.

[Content Link Details Input](#)

Input representation of the request to synchronize content token data from a document to sObjects. It specifies the ID of an individual content link and its corresponding new value to be updated.

[Contract Action Input](#)

Input to get action details for the contract.

[Contract Input](#)

Input to create and update contract.

[Document Template Request](#)

Input representation of a document template resource.

[Document Template Update Input](#)

Input representation to update a document template.

[Envelope Documents Input](#)

Input to get document details for e-signature.

[Envelope Email Notification Input](#)

Input to get email notification details.

[Envelope Email Settings Input](#)

Email settings input to get email details from API.

[Envelope Notification Expiration Input](#)

Input to get notification expiration information.

[Envelope Notification Reminder Input](#)

Input to get notification reminder information for e-signature document.

[Envelope Notification Input](#)

Input to get notification information for e-signature.

[Envelope Recipient Details Input](#)

Input to get recipient details.

[Envelope Recipients Input](#)

Input to get different recipients list.

[Envelope Send Input](#)

Input request to send e-signature details from API.

[Envelope Void Input](#)

Input to get void envelope related details.

[External Document Creation Input](#)

Input representation of the request to create an external document.

[External Document Metadata](#)

Input representation of external document metadata.

[Extraction Context Attribute Mapping Input](#)

Input representation of attribute mappings used in the extraction context.

[Extraction Context Mapping Input](#)

Input representation of a extraction context mapping.

[Extraction Context Use Case Mapping Input](#)

Input representation of the use case-mapping configuration in the extraction context.

[Object Reference Input](#)

Input representation of object reference.

[Section Input](#)

Input representation of a section.

[Save External Document Input](#)

Input representation to save external document to salesforce.

[Template Input](#)

Input representation to get contract document related details.

[Usages Input](#)

Input representation of usages.

## Content Link Input

Input representation of the request to fetch the content token data from the ContentLink object.

### JSON example

```
{
  "referenceObjectId": "a0X4W00000X8jklUAB",
  "isBulkRequest": "false",
  "contentLinkIds": [
    "0D56A000008yhfSAAQ",
    "0D56A000008yhgTABQ"
  ]
}
```

### Properties

| Name                  | Type     | Description  | Required or Optional | Available Version |
|-----------------------|----------|--|----------------------|-------------------|
| content<br>LinkIds    | String[] | List of the content link IDs to fetch the data.  | Optional             | 62.0              |
| isBulkRequest         | Boolean  | Indicates whether fields associated with the same object ID are grouped and fetched together in a single bulk request ( <code>true</code> ) or not ( <code>false</code> ). | Optional             | 66.0              |
| reference<br>ObjectId | String   | ID of the reference object to retrieve the content data.   | Optional             | 62.0              |

## Content Link Data Sync Input

Input representation of the entire request to synchronize token data from a document to sObjects.

### JSON example

```
{
  "referenceObjectId": "069xx0000004CsCAAU",
  "partialCommit": "false",
  "isBulkRequest": "false",
  "contentLinkDetailsList": [
    {
      "contentLinkId": "6UPVW00000003CQ4AY",
      "contentValue": "Contract Description for JSON"
    },
    {
      "contentLinkId": "6UPxx0000004CCGGA2",
      "contentValue": "3"
    }
  ]
}
```

```

    }
  ]
}

```

### Properties

| Name                   | Type   | Description   | Required or Optional | Available Version |
|------------------------|--|---|----------------------|-------------------|
| contentLinkDetailsList | <a href="#">Content Link Details Input[]</a> | List of content link records with their IDs and updated values. Each object includes a <code>contentLinkId</code> and a <code>contentValue</code> property value.                 | Required             | 65.0              |
| isBulkRequest          | Boolean                                      | Indicates whether fields associated with the same object ID are grouped and fetched together in a single bulk request ( <code>true</code> ) or not ( <code>false</code> ).        | Optional             | 66.0              |
| partialCommit          | Boolean                                      | Indicates whether successful records should be committed in case of partial errors ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> . | Optional             | 65.0              |
| referenceObjectId      | String                                       | ID of the target Salesforce object that must be updated, such as a Contract record.   | Optional             | 65.0              |

## Content Link Details Input

Input representation of the request to synchronize content token data from a document to sObjects. It specifies the ID of an individual content link and its corresponding new value to be updated.

### JSON example

```

{
  "contentLinkId": "6UPxx0000004C92GAE",
  "contentValue": "Contract Description for JSON"
}

```

### Properties

| Name          | Type   | Description                                 | Required or Optional | Available Version |
|---------------|--------|---|----------------------|-------------------|
| contentLinkId | String | ID of the content link object.              | Required             | 65.0              |
| contentValue  | String | Updated token value data from the document. | Required             | 65.0              |


## Contract Action Input


Input to get action details for the contract.

**JSON example**

```
{
  "actionApiName" : "updateEnvelopeStatus",
  ... "actionId" : //object state action definition id,
  "actionData":{
    "isUpdateEnvelopeStatusSuccess": true
  }
}
```

**Properties**

| Name          | Type                | Description  | Required or Optional | Available Version |
|---------------|---------------------|--|----------------------|-------------------|
| actionApiName | String              | API name for respective contract action.   | Optional             | 57.0              |
| actionId      | String              | ID for Object state Action Definition record.  | Optional             | 57.0              |
|               |                     |  <b>Note:</b> For the list of all standard actions supported, refer <a href="#">Predefined Dynamic (Contract) Actions</a> . |                      |                   |
| actionData    | Map<String, String> | Action body with supported format string.  | Optional             | 57.0              |

 **Note:** For any request, either `actionApiName` or `actionId` must be passed. If none passed, the application raises an exception.

**Contract Input**

Input to create and update contract.

**JSON example for creating and updating contract**

```
{
  "sourceObjectId" : "006xx000001a4KaAAI",
  "templateName" : "Value1",
  "isAutoDocgenRequired" :true/false
}
```

**Properties**

| Name  | Type    | Description   | Required or Optional | Available Version |
|---|---------|---|----------------------|-------------------|
| <del>isAutoDocgenRequired</del><br>isAutoDocgenRequired | Boolean | Specifies whether automatic document generation is required or not. | Required             | 56.0              |
| recordTypeName  | String  | Contract record type name.  | Optional             | 56.0              |
| sourceObjectId  | String  | Source record ID.   | Required             | 56.0              |

| Name         | Type   | Description                                     | Required or Optional | Available Version |
|--------------|--------|---|----------------------|-------------------|
| templateName | String | Document template name for document generation. | Optional             | 56.0              |

## Document Template Request

Input representation of a document template resource.

### JSON example

```
{
  "name": "TemplateName",
  "type": "MicrosoftWord/MicrosoftPowerpoint/Microsoft365Word",
  "tokenMappingMethodType": "OmniDataTransform",
  "tokenMappingType": "JSON",
  "extractOmniDataTransformName": "ExtractName",
  "mapperOmniDataTransformName": "MapperName",
  "contentDocumentId": "069xx0000004CyeAAE",
  "documentGenerationMechanism": "ServerSide",
  "usageType": "Contract_Lifecycle_Management",
  "tokenList": "token1,token2,token3"
}
```

This example shows a sample request with `ContextService` as the value of the `tokenMappingMethodType` property.

```
{
  "name": "TemplateName",
  "type": "MicrosoftWord/MicrosoftPowerpoint/Microsoft365Word",
  "tokenMappingMethodType": "ContextService",
  "contextDefinitionName": "QuoteProposal",
  "contextMappingName": "QuoteToContextMapping",
  "customClassName": "QuoteBundleTransformer",
  "contextFilterName": "QuoteWithLargeQtyLineItems",
  "tokenMappingType": "JSON",
  "extractOmniDataTransformName": "ExtractName",
  "mapperOmniDataTransformName": "MapperName",
  "contentDocumentId": "069xx0000004CyeAAE",
  "documentGenerationMechanism": "ClientSide",
  "usageType": "Contract_Lifecycle_Management",
  "tokenList": "token1,token2,token3"
}
```

### Properties

| Name              | Type   | Description   | Required or Optional | Available Version |
|-------------------|--------|---|----------------------|-------------------|
| contentDocumentId | String | ID of the Document associated with a document template. | Optional             | 60.0              |

| Name                                     | Type   | Description   | Required or Optional  | Available Version |
|--|--------|---|---|-------------------|
| <code>contextDefinitionName</code>       | String | Name of the context definition that contains the mapping details used for extraction in the Context Service token mapping type.   | Required if the <code>tokenMappingMethodType</code> is set to <code>ContextService</code> . | 64.0              |
| <code>contextMappingName</code>          | String | Name of the context mapping used for extraction in the Context Service token mapping type.  | Required if the <code>tokenMappingMethodType</code> is set to <code>ContextService</code> . | 64.0              |
| <code>contextFilterName</code>           | String | Name of the context filter that's used to filter, order, or limit the data extracted from the context service at run time. This property is available only when the <code>tokenMappingMethodType</code> property value is <code>ContextService</code> . | Optional  | 66.0              |
| <code>customClassName</code>             | String | Name of a custom Apex class that's used to transform token data before document generation. This property is available only when the <code>tokenMappingMethodType</code> property value is <code>ContextService</code> .                                | Optional  | 66.0              |
| <code>documentGenerationMechanism</code> | String | Specifies the method for generating the document. Possible values are: <ul style="list-style-type: none"> <li>• <code>Client-side</code></li> <li>• <code>Server-side</code></li> </ul> The default value is <code>Client-side</code> .                 | Optional  | 60.0              |
| <code>extractorName</code>               | String | Name of the OmniDataTransform bundle of the extract type.   | Optional  | 60.0              |
| <code>mapperOmniDataTransformName</code> | String | Name of the OmniDataTransform bundle of the mapper type.  | Optional  | 60.0              |
| <code>name</code>                        | String | Name of the document template.  | Required  | 60.0              |
| <code>tokenList</code>                   | String | List of tokens present in the document template.  | Optional  | 60.0              |
| <code>tokenMappingMethodType</code>      | String | Processing method for the data that can originate from same source object. Possible values are: <ul style="list-style-type: none"> <li>• <code>ContextService</code></li> <li>• <code>OmniDataTransform</code></li> </ul>                               | Required  | 60.0              |

| Name                          | Type   | Description  | Required or Optional | Available Version |
|-------------------------------|--------|--|----------------------|-------------------|
|                               |        | The default value is <code>ContextService</code> . |                      |                   |
| <code>tokenMappingType</code> | String | Mapping type for tokens of the document template.  | Required             | 60.0              |
| <code>type</code>             | String | Type of document template.                         | Required             | 60.0              |
| <code>usageType</code>        | String | Usage type of the document template.               | Optional             | 60.0              |

## Document Template Update Input

Input representation to update a document template.

### JSON example

```
{
  "isActive": "false",
  "status": "Draft",
  "documentGenerationMechanism": "ClientSide",
  "extractOmniDataTransformName": "Extractor",
  "mapperOmniDataTransformName": "Mapper",
  "shouldDisplayUnmappedToken": "false",
  "tokenList": "token1,token2,token3",
  "tokenMappingMethodType": "ContextService",
  "contextDefinitionName": "QuoteProposal",
  "contextMappingName": "QuoteToContextMapping",
  "customClassName": "QuoteBundleTransformer",
  "contextFilterName": "QuoteWithLargeQtyLineItems",
  "usageType": "Contract_Lifecycle_Management",
  "contentDocumentId": "069xxxxxxxxxxxxxxxxx"
}
```

### Properties

| Name                               | Type   | Description   | Required or Optional  | Available Version |
|------------------------------------|--------|---|---|-------------------|
| <code>contentDocumentId</code>     | String | ID of the document associated with a document template.   | Optional  | 60.0              |
| <code>contextDefinitionName</code> | String | Name of the context definition that contains the mapping details used for extraction in the Context Service token mapping type. | Required if the <code>tokenMappingMethodType</code> is set to <code>ContextService</code> . | 64.0              |
| <code>contextMappingName</code>    | String | Name of the context mapping used for extraction in the Context Service token mapping type.                                      | Required if the <code>tokenMappingMethodType</code> is set to <code>ContextService</code> . | 64.0              |

| Name                         | Type    | Description  | Required or Optional | Available Version |
|------------------------------|---------|--|----------------------|-------------------|
| contextFilterName            | String  | Name of the context filter that's used to filter, order, or limit the data extracted from the context service at run time. This property is available only when <code>tokenMappingMethodType</code> property value is <code>ContextService</code> .                        | Optional             | 66.0              |
| customClassName              | String  | Name of a custom Apex class that's used to transform token data before document generation. This property is available only when <code>tokenMappingMethodType</code> property value is <code>ContextService</code> .   | Optional             | 66.0              |
| documentGenerationMechanism  | String  | Specifies the method for generating the document. Possible values are: <ul style="list-style-type: none"> <li>• <code>Client-side</code></li> <li>• <code>Server-side</code></li> </ul> The default value is <code>Client-side</code> .                                    | Optional             | 60.0              |
| extractOmniDataTransformName | String  | Name of the OmniDataTransform bundle of the extract type.  | Optional             | 60.0              |
| isActive                     | Boolean | Indicates whether the document template is set to active ( <code>true</code> ) or inactive ( <code>false</code> ).   | Optional             | 60.0              |
| mapperOmniDataTransformName  | String  | Name of the OmniDataTransform bundle of the mapper type.   | Optional             | 60.0              |
| shouldDisplayUnmappedToken   | Boolean | Indicates whether the document template unmapped tokens be displayed ( <code>true</code> ) or not ( <code>false</code> ).  | Optional             | 60.0              |
| status                       | String  | Status to be set for the document template.  | Optional             | 60.0              |
| tokenList                    | String  | List of tokens present in the document template.   | Optional             | 60.0              |
| tokenMappingMethodType       | String  | Processing method for data that can originate from the same source object. Possible values are: <ul style="list-style-type: none"> <li>• <code>ContextService</code></li> <li>• <code>OmniDataTransform</code></li> </ul> The default value is <code>ContextService</code> | Required             | 60.0              |

| Name      | Type   | Description                          | Required or Optional | Available Version |
|-----------|--------|--------------------------------------|----------------------|-------------------|
| usageType | String | Usage type of the document template. | Optional             | 60.0              |

## Envelope Documents Input

Input to get document details for e-signature.

### Properties

| Name          | Type   | Description                         | Required or Optional | Available Version |
|---------------|--------|-------------------------------------|----------------------|-------------------|
| documentId    | String | Document ID.                        | Required             | 56.0              |
| fileExtension | String | File extension type.                | Required             | 56.0              |
| name          | String | Name of document.                   | Required             | 56.0              |
| sourceId      | String | Object ID of the document.          | Required             | 56.0              |
| sourceType    | String | Object type of the document object. | Required             | 56.0              |

## Envelope Email Notification Input

Input to get email notification details.

### Properties

| Name              | Type   | Description                      | Required or Optional | Available Version |
|-------------------|--------|----------------------------------|----------------------|-------------------|
| emailBody         | String | Email message sent to recipient. | Optional             | 56.0              |
| emailSubject      | String | Email subject.                   | Optional             | 56.0              |
| supportedLanguage | String | Simple type supported language.  | Optional             | 56.0              |

## Envelope Email Settings Input

Email settings input to get email details from API.

### Properties

| Name         | Type   | Description                      | Required or Optional | Available Version |
|--------------|--------|----------------------------------|----------------------|-------------------|
| emailBody    | String | Email message sent to recipient. | Optional             | 56.0              |
| emailSubject | String | Email subject.                   | Required             | 56.0              |

## Envelope Notification Expiration Input

Input to get notification expiration information.

### Properties

| Name                       | Type   | Description   | Required or Optional | Available Version |
|----------------------------|--------|---|----------------------|-------------------|
| <code>expireAfter</code>   | String | An integer specifying the number of days that a sent envelope remains active before it expires.   | Optional             | 56.0              |
| <code>expireEnabled</code> | String | Indicates whether or not the envelope is no longer available for signing after the specified number of days after it was sent.  | Optional             | 56.0              |
| <code>expireWarn</code>    | String | Integer that specifying the number of days before the envelope expires that an expiration warning email is sent to the recipient; if set to 0 (zero), no warning email is sent. | Optional             | 56.0              |

## Envelope Notification Reminder Input

Input to get notification reminder information for e-signature document.

### Properties

| Name                           | Type   | Description         | Required or Optional | Available Version |
|--------------------------------|--------|---------------------|----------------------|-------------------|
| <code>reminderDelay</code>     | String | Reminder delay.     | Optional             | 56.0              |
| <code>reminderEnabled</code>   | String | Reminder enabled.   | Optional             | 56.0              |
| <code>reminderFrequency</code> | String | Reminder frequency. | Optional             | 56.0              |

## Envelope Notification Input

Input to get notification information for e-signature.

### Properties

| Name                     | Type   | Description          | Required or Optional | Available Version |
|--------------------------|--|----------------------|----------------------|-------------------|
| <code>expirations</code> | <a href="#">Envelope Send Notification Expirations Request</a> | Expiration settings. | Optional             | 56.0              |
| <code>reminders</code>   | <a href="#">Envelope Send Notification Reminders Request</a>   | Reminder settings.   | Optional             | 56.0              |

| Name               | Type    | Description  | Required or Optional | Available Version |
|--------------------|---------|--|----------------------|-------------------|
| useAccountDefaults | Boolean | Indicates whether or not the account defaults for notifications must be used by the envelope [ true   false ]. | Optional             | 56.0              |

## Envelope Recipient Details Input

Input to get recipient details.

### Properties

| Name              | Type   | Description  | Required or Optional | Available Version |
|-------------------|--|--|----------------------|-------------------|
| accessCode        | String   | Specifies the access code a recipient has to enter to validate identity.   | Optional             | 56.0              |
| email             | String   | Email address of the recipients.   | Required             | 56.0              |
| emailNotification | <a href="#">EnvelopeSendEmailNotificationRequest</a> | Complex type that has information for setting the language for the recipients email information (if provided for one recipient it overrides the emailSubject and emailBody, also you must provide emailNotification for all recipients). | Optional             | 56.0              |
| id                | String   | Recipient Id.  | Optional             | 56.0              |
| name              | String   | Name of the document.  | Required             | 56.0              |
| parentSignerName  | String   | Parent signer name for in person signers.  | Optional             | 56.0              |
| phone             | String   | Phone number of the signer.  | Optional             | 56.0              |
| recipientId       | String   | Recipient Id.  | Required             | 56.0              |
| recipientLocale   | String   | Recipient locale.  | Optional             | 56.0              |
| recipientType     | String   | Recipient type.  | Required             | 56.0              |
| routingNumber     | Integer  | Routing number.  | Optional             | 56.0              |
| routingOrder      | Integer  | Specifies the routing order of the recipient in the envelope.  | Required             | 56.0              |
| signerRole        | Integer  | Indicates the index or order of the signer in the signature tabs.  | Required             | 56.0              |
| title             | String   | Title of the signer.   | Optional             | 56.0              |

## Envelope Recipients Input

Input to get different recipients list.

## Properties

| Name                | Type   | Description                     | Required or Optional | Available Version |
|---------------------|--|---------------------------------|----------------------|-------------------|
| carbonCopies        | <a href="#">Envelope Send Recipient Detail Request[]</a> | Carbon copy user details.       | Optional             | 56.0              |
| certifiedDeliveries | <a href="#">Envelope Send Recipient Detail Request[]</a> | Certificate deliveries details. | Optional             | 56.0              |
| inPersonSigners     | <a href="#">Envelope Send Recipient Detail Request[]</a> | In person signer details.       | Optional             | 56.0              |
| signers             | <a href="#">Envelope Send Recipient Detail Request[]</a> | Array of signer details.        | Required             | 56.0              |

## Envelope Send Input

Input request to send e-signature details from API.

### JSON example

```
{
  "emailSettings" : { // API: required, UI: required
    "emailSubject": "", // API: required,
    "emailBody": ""
  },
  "vendor": "DocuSign", // API: required,
  "recipients": { // API: required,
    "signers": [ // API: required,
      {
        "name": "", // API: required,
        "email": "", // API: required,
        "routingOrder": "", // API: required,
        "recipientId": "", // API: required,
        "signerRole": "", // API: required,
        "recipientType": "", // API: required,
        "recipientLocale": "",
        "phone": "",
        "emailNotification": {
          "emailSubject": "",
          "emailBody": "",
          "supportedLanguage": ""
        }
      }
    ],
    "inPersonSigners": [
      {
        "name": "",
        "email": "",
        "routingOrder": "",

```

```

        "recipientId": "",
        "signerRole": "",
        "emailNotification": {
            "emailSubject": "",
            "emailBody": "",
            "supportedLanguage": ""
        }
    },
    ],
    "certifiedDeliveries": [{
        "name": "",
        "email": "",
        "routingOrder": "",
        "recipientId": "",
        "signerRole": "",
        "emailNotification": {
            "emailSubject": "",
            "emailBody": "",
            "supportedLanguage": ""
        }
    }
    ],
    "carbonCopies": [{
        "name": "",
        "email": "",
        "routingOrder": "",
        "recipientId": "",
        "signerRole": "",
        "emailNotification": {
            "emailSubject": "",
            "emailBody": "",
            "supportedLanguage": ""
        }
    }
    ]
},
"documents": [{ // API: required
    "name": "", // API: required,
    "sourceId": "", // API: required,
    "fileExtension": "", // API: required,
    "sourceType": "", // API: required,
    "documentId": "" // API: required,
}
],
"notificationSettings": {
    "useAccountDefaults": "",
    "reminders": {
        "reminderEnabled": "",
        "reminderDelay": "",
        "reminderFrequency": ""
    },
    "expirations": {
        "expireEnabled": "",
        "expireAfter": "",

```

```

    "expireWarn": ""
  }
}

```

### Properties

| Name                 | Type   | Description                  | Required or Optional | Available Version |
|----------------------|--|------------------------------|----------------------|-------------------|
| documents            | <a href="#">Envelope Send Documents Request[]</a>    | Array of documents to send.  | Required             | 56.0              |
| emailSettings        | <a href="#">Envelope Send Email Settings Request</a> | Email settings.              | Required             | 56.0              |
| notificationSettings | <a href="#">Envelope Send Notification Request</a>   | Notification settings.       | Optional             | 56.0              |
| parentId             | String   | ID of the parent object.     | Optional             | 56.0              |
| recipients           | <a href="#">Envelope Send Recipients Request</a>     | Map of different recipients. | Required             | 56.0              |
| vendor               | String   | Vendor name.                 | Required             | 56.0              |

## Envelope Void Input

Input to get void envelope related details.

### JSON example

```

{
  "voidedReason": "", //required
  "senderEmail": ""
}

```

### Properties

| Name         | Type   | Description  | Required or Optional | Available Version |
|--------------|--------|--|----------------------|-------------------|
| senderEmail  | String | Refers to the email of the user who initiated the voiding. | Optional             | 56.0              |
| voidedReason | String | Reason for which the envelope is being voided.             | Required             | 56.0              |

## External Document Creation Input

Input representation of the request to create an external document.

**JSON example**

```
{
  "refObjectId": "",
  "contentversionId": "",
  "documentNamePrefix": "namespaceprefix",
  "isAsync": true
}
```

**Properties**

| Name               | Type   | Description  | Required or Optional | Available Version |
|--------------------|--------|--|----------------------|-------------------|
| contentVersionId   | String | Content version ID of the document using which new external document is created.     | Required             | 58.0              |
| documentNamePrefix | String | Document name prefix, which is required to name the newly created external document. | Optional             | 58.0              |
| isAsync            | String | Determines the way the external document gets created.                               | Optional             | 58.0              |
| refObjectId        | String | ID of the reference object. This can be either a document template or a contract ID. | Optional             | 58.0              |

**External Document Metadata**

Input representation of external document metadata.

**Properties**

| Name             | Type                                     | Description            | Required or Optional | Available Version |
|------------------|--|------------------------|----------------------|-------------------|
| objectReferences | <a href="#">Object Reference Input[]</a> | Object references list | Optional             | 58.0              |
| sections         | <a href="#">Section Input[]</a>          | Section list           | Optional             | 59.0              |

**Extraction Context Attribute Mapping Input**

Input representation of attribute mappings used in the extraction context.

**JSON example**

```
{
  "contextAttributeMapping": [
    {
      "attributeId": "11nxx000001hOozAAE",
      "description": "extract startDate from the document"
    }
  ]
}
```

```

    },
    {
      "attributeId": "11nxx000001hOozAAV",
      "description": "extract startDate from the document"
    },
    {
      "attributeId": "11nxx000001hOozAAR",
      "description": "extract startDate from the document"
    }
  ]
}

```

### Properties

| Name        | Type   | Description  | Required or Optional | Available Version |
|-------------|--------|--|----------------------|-------------------|
| attributeId | String | ID of the context attribute mapping required for update. | Required             | 61.0              |
| description | String | Description of what the attribute maps to.               | Optional             | 61.0              |

## Extraction Context Mapping Input

Input representation of a extraction context mapping.

### JSON example

```

{
  "ContextUsecaseMapping": {
    "templateName": "ContractExtractionTemplate",
    "contextDefinitionDeveloperName": "ContractExtractionContextDefinition",
    "mappingName": "ContractExtractionMappingName",
    "targetObject": "Contract",
    "recordType": "CLM"
  },
  "contextAttributeMapping": [
    {
      "attributeId": "11nxx000001hOozAAE",
      "description": "extract startDate from the document"
    },
    {
      "attributeId": "11nxx000001hOozAAV",
      "description": "extract startDate from the document"
    },
    {
      "attributeId": "11nxx000001hOozAAR",
      "description": "extract startDate from the document"
    }
  ]
}

```

**Properties**

| Name                          | Type   | Description   | Required or Optional | Available Version |
|-------------------------------|--|---|----------------------|-------------------|
| context<br>AttributeMapping   | <a href="#">Extraction Context Attribute Mapping Input[]</a> | List of attributes and their mappings.                    | Yes                  | 61.0              |
| context<br>UseCase<br>Mapping | <a href="#">Extraction Context Use Case Mapping Input</a>    | Details of the use case for which the mapping is defined. | Yes                  | 61.0              |

**Extraction Context Use Case Mapping Input**

Input representation of the use case-mapping configuration in the extraction context.

**JSON example**

```
{
  "ContextUseCaseMapping": {
    "templateName": "ContractExtractionTemplate",
    "contextDefinitionDeveloperName": "ContractExtractionContextDefinition",
    "mappingName": "ContractExtractionMappingName",
    "targetObject": "Contract",
    "recordType": "CLM"
  }
}
```

**Properties**

| Name                                   | Type   | Description                                 | Required or Optional | Available Version |
|--|--------|---|----------------------|-------------------|
| context<br>Definition<br>DeveloperName | String | Developer name of the context definition.   | Required             | 61.0              |
| mappingName                            | String | Name of the mapping.                        | Required             | 61.0              |
| recordType                             | String | Type of the record involved in the mapping. | Required             | 61.0              |
| targetObject                           | String | SObject that the data maps to.              | Required             | 61.0              |
| templateName                           | String | Name of the template used for the mapping.  | Required             | 61.0              |

**Object Reference Input**

Input representation of object reference.

**Properties**

| Name       | Type                         | Description | Required or Optional | Available Version |
|------------|------------------------------|-------------|----------------------|-------------------|
| objectId   | String                       | ObjectId    |                      | 58.0              |
| objectType | String                       | ObjectType  |                      | 58.0              |
| usages     | <a href="#">Usages Input</a> | Usages      |                      | 59.0              |

**Section Input**

Input representation of a section.

**Properties**

| Name       | Type    | Description | Required or Optional | Available Version |
|------------|---------|-------------|----------------------|-------------------|
| guid       | String  | GUID        |                      | 59.0              |
| isReadOnly | Boolean | IsReadOnly  |                      | 59.0              |
| name       | String  | Name        |                      | 59.0              |

**Save External Document Input**

Input representation to save external document to salesforce.

**JSON example**

```
{
  "externalDocumentId" : "id",
  "isAsync" : "false",
  "metadata": {
    "sections" : [
      {
        "guid": "guid1",
        "name": "test1",
        "isReadOnly": false
      },
      {
        "guid": "guid2",
        "name": "test2",
        "isReadOnly": false
      }
    ],
    "objectReferences" : [
      {
        "objectType": "clause",
        "objectId": "clauseid1",
        "usages": {
```

```

        "sectionIds": [
            "guid1",
            "guid2"
        ],
        "usedInDocument": true
    }
},
{
    "objectType": "clause",
    "objectId": "clauseid2",
    "usages": {
        "sectionIds": [
            "guid1",
            "guid2"
        ],
        "usedInDocument": false // points to if this object is used in
document as well without sections
    }
}
]
}
}

```

### Properties

| Name               | Type                                       | Description                 | Required or Optional | Available Version |
|--------------------|--|-----------------------------|----------------------|-------------------|
| externalDocumentId | String                                     | ID of an external document. | Required             | 58.0              |
| isAsync            | Boolean                                    | Is Async                    | Required             | 58.0              |
| metadata           | <a href="#">External Document Metadata</a> | Metadata                    | Optional             | 58.0              |

### Template Input

Input representation to get contract document related details.

#### JSON example

```

{
  "templateId": "2dtxx000000004rAAA",
  "isExternalReviewImport": false,
  "externalReviewType": "OnlineMicrosoft365"
}

```

**Properties**

| Name                   | Type    | Description  | Required or Optional | Available Version |
|------------------------|---------|--|----------------------|-------------------|
| externalReviewType     | String  | Type of external review. Possible values are: <ul style="list-style-type: none"> <li>OnlineMicrosoft365</li> <li>OfflineMicrosoftWord</li> </ul> | Optional             | 60.0              |
| isExternalReviewImport | Boolean | Indicates whether the checkout is for an external review import ( <code>true</code> ) or not ( <code>false</code> ).                             | Optional             | 59.0              |
| pdfDocumentId          | String  | ID for Contract PDF document.  | Optional             | 56.0              |
| templateId             | String  | Template ID with key prefix 2dt used to generate document.   | Required             | 56.0              |
| wordDocumentId         | String  | ID for Contract word document.   | Optional             | 56.0              |

**Usages Input**

Input representation of usages.

**Properties**

| Name           | Type     | Description    | Required or Optional | Available Version |
|----------------|----------|----------------|----------------------|-------------------|
| sectionIds     | String[] | Section IDs    |                      | 59.0              |
| usedInDocument | Boolean  | UsedInDocument |                      | 59.0              |

**Response Bodies**

Here's a list of Salesforce Contracts response bodies.

[Clause Library Category Response](#)

Output representation of the request to retrieve the clause library category configuration.

[Clause Category Response](#)

Output representation of the field-level details for a clause category.

[Clause Library Category Response](#)

Response for getting Clause Library Category configuration.

[Content Document](#)

Output representation of the content document record.

[Content Document List](#)

Output representation of the content document record list.

[Content Document Response](#)

Output representation of the individual content documents.

[Content Link Data Sync](#)

Output representation that contains the details of data synchronization with success and failure information.

[Content Link Data Sync Detail](#)

Output representation that contains content link details for the requested IDs.

[Content Link List](#)

Output representation of the content data for the specified reference IDs.

[Content Link Detail](#)

Output representation of the content link details for the specified reference IDs.

[Contract Action List](#)

List of contract actions.

[Contract Action Response](#)

Contract action response for a particular contract ID.

[Contract Document Version](#)

Contract document version record.

[Contract Document Version CC Response](#)

Output representation of the latest details of a contract document version, including its ID, status, and associated documents and attachments.

[Contract Document Versions List](#)

Contract document versions record list.

[Contract List](#)

Contract list.

[Document Clause Fields Response](#)

Output representation for the list of document clause fields.

[Document Clause Set List Response](#)

Output representation for the list of document clause set.

[Document Clause Set Response](#)

Output representation of the details of a clause set.

[Document Generate](#)

Output Representation of document generation record.

[Document Generation Process Status](#)

Status of the document generation process.

[Document List](#)

Document record list.

[Document Recipient Status](#)

Output representation of recipient status and sequence information for the signers.

[Document Record](#)

Document record.

[Document Template List](#)

Output representation for the document template list.

[Document Template Parent](#)

Output representation of the document template parent record.

[Document Template Child](#)

Output representation of the document template child record.

[Document Template](#)

Output representation for the document template record.

[Envelope Details](#)

Envelope details.

[Envelope Status List](#)

Output representation of the envelope status update request.

[Envelope Status](#)

Output representation of the envelope status record.

[Envelope Void](#)

Void envelope related details.

[External Document Creation Output](#)

Output representation for the create external document request.

[External Document Output](#)

Output representation of the details of an external document.

[External Document Review CC](#)

Output representation for external document version review.

[Extraction Context Attribute](#)

Output representation of extraction context attribute mapping.

[Extraction Context Definition](#)

Output representation of extraction context definition details.

[Extraction Context Mapping](#)

Output representation of mapping details within an extraction context, used to associate extracted data with specific system entities.

[Extraction Context Mapping Output](#)

Output representation of extraction context mapping.

[Extraction Context Mappings](#)

Output Representation to create and update extraction context mapping.

[Extraction Context Use Case Mapping](#)

Output representation of extraction context use case mapping.

[Failed Content Link List](#)

Output representation of the content ID and error details for the failed requests.

[Generic Output](#)

Generic output response.

[Recipient Details](#)

Recipient details.

[Recipient List](#)

List of recipients.

[Recipients Response](#)

Output representation of a recipient's personal and status information in a contract document's signing process.

[Save External Document Output](#)

Output representation for save external document operation.

[Signer Roles Details](#)

Details of the e-signature signer roles.

[Template List](#)

List of configured templates.

[Template Record](#)

Template record.

[E-signature Notification Expiration](#)

E-signature notification expiration settings.

[E-signature Notification Reminder](#)

E-signature notification reminder settings.

[E-signature Notification Settings](#)

E-signature notification settings.

## Clause Library Category Response

Output representation of the request to retrieve the clause library category configuration.

### JSON example

```

{
  "clauseCategories": [
    {
      "id": "0zMRO000000001s", //not a required response field
      "name": "Confidential",
      "usageType": "Contract Clause Category"
    },
    {
      "name": "Environment",
      "usageType": "Disclosure Category"
    }
  ]
}

```

| Property Name    | Type                                       | Description                                 | Filter Group and Version | Available Version |
|------------------|--|---|--------------------------|-------------------|
| clauseCategories | <a href="#">Clause Category Response[]</a> | The list of clause category configurations. | Small, 57.0              | 57.0              |

## Clause Category Response

Output representation of the field-level details for a clause category.

| Property Name | Type   | Description  | Filter Group and Version | Available Version |
|---------------|--------|--|--------------------------|-------------------|
| id            | String | The ID of the custom clause configuration.   | Small, 57.0              | 57.0              |
| name          | String | The name of the clause configuration.  | Small, 57.0              | 57.0              |
| usageType     | String | The usage type for the clause configuration.<br>Possible values are: <ul style="list-style-type: none"> <li>Contract Clause Category</li> <li>Disclosure Category</li> </ul> | Small, 57.0              | 57.0              |

## Clause Library Category Response

Response for getting Clause Library Category configuration.

| Property Name    | Type   | Description                                | Filter Group and Version | Available Version |
|------------------|--|--|--------------------------|-------------------|
| clauseCategories | <a href="#">Clause Category Response</a> on page 178 | Specifies list of category configurations. | Small, 57.0              | 57.0              |

## Content Document

Output representation of the content document record.

| Property Name             | Type    | Description   | Filter Group and Version | Available Version |
|---------------------------|---------|---|--------------------------|-------------------|
| contentDocumentId         | String  | Record ID of content document.  | Small, 56.0              | 56.0              |
| contentDocumentLinkId     | String  | Record ID of content document link.   | Small, 56.0              | 56.0              |
| contractDocumentVersionId | String  | Record ID of the linked contract document version object.   | Small, 56.0              | 56.0              |
| createdDate               | String  | Created date of content document.   | Small, 56.0              | 56.0              |
| fileExtension             | String  | File extension of content document.   | Small, 56.0              | 56.0              |
| isSharedExternally        | Boolean | Indicates whether the document is available for external user access ( <code>true</code> ) or restricted to internal users only ( <code>false</code> ). | Small, 56.0              | 60.0              |
| lastModifiedDate          | String  | Last modified date of content document.   | Small, 56.0              | 56.0              |

| Property Name | Type   | Description                | Filter Group and Version | Available Version |
|---------------|--------|----------------------------|--------------------------|-------------------|
| title         | String | Title of content document. | Small, 56.0              | 56.0              |

## Content Document List

Output representation of the content document record list.

| Property Name             | Type                                | Description  | Filter Group and Version | Available Version |
|---------------------------|-------------------------------------|--|--------------------------|-------------------|
| contractDocumentVersionId | String                              | Contract document version ID for which list of content documents is fetched. | Big, 56.0                | 56.0              |
| data                      | <a href="#">Content Document</a> [] | List of content document details related to the contract document version.   | Big, 56.0                | 56.0              |

## Content Document Response

Output representation of the individual content documents.

### JSON Sample

```
{
  "contractId": "contractId_value",
  "contractDocumentVersionId": "contractDocumentVersionId_value",
  "status": "",
  "contractDocuments": [
    {
      "contentDocumentId": "contentDocumentId_value1",
      "contractDocumentVersionId": "contractDocumentVersionId_value1",
      "createdDate": "createdDate_value1",
      "fileExtension": "fileExtension_value1",
      "lastModifiedDate": "lastModifiedDate_value1",
      "title": "title_value1",
      "isSharedExternally": true
    }
  ],
  "attachments": [
    {
      "contentDocumentId": "contentDocumentId_value2",
      "contractDocumentVersionId": "contractDocumentVersionId_value2",
      "createdDate": "createdDate_value2",
      "fileExtension": "fileExtension_value2",
      "lastModifiedDate": "lastModifiedDate_value2",
      "title": "title_value2",
      "isSharedExternally": true
    }
  ]
}
```

| Property Name                 | Type    | Description  | Filter Group and Version | Available Version |
|-------------------------------|---------|--|--------------------------|-------------------|
| content<br>DocumentId         | String  | Record ID of the content document.   | Small, 60.0              | 60.0              |
| contentDocument<br>LinkId     | String  | Record ID of the content document link.  | Small, 60.0              | 60.0              |
| contractDocument<br>VersionId | String  | Record ID of the linked ContractDocumentVersion object.  | Small, 60.0              | 60.0              |
| createdDate                   | String  | Creation date of the content document.   | Small, 60.0              | 60.0              |
| fileExtension                 | String  | File extension of the content document.  | Small, 60.0              | 60.0              |
| isShared<br>Externally        | Boolean | Indicates if the file can be viewed by all users ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>true</code> . | Small, 60.0              | 60.0              |
| lastModified<br>Date          | String  | Last modification date of the content document.  | Small, 60.0              | 60.0              |
| title                         | String  | Title of the content document.   | Small, 60.0              | 60.0              |

## Content Link Data Sync

Output representation that contains the details of data synchronization with success and failure information.

### JSON example

```
{
  "failedContentLinkDataList": [
    {
      "contentLinkId": "6UPxx0000004CCGGA2",
      "failureReason": "Contract Term: value not of required type: 3",
      "isSuccess": false,
      "value": "3"
    }
  ],
  "referenceObjectId": "069xx0000004CsCAAU",
  "saveCommitted": false,
  "successContentLinkDataList": [
    {
      "contentLinkId": "6UPxx0000004C92GAE",
      "isSuccess": true,
      "value": "Contract Description for JSON"
    }
  ]
}
```

| Property Name                  | Type   | Description   | Filter Group and Version | Available Version |
|--------------------------------|--|---|--------------------------|-------------------|
| failedContent<br>LinkDataList  | <a href="#">Content Link Data Sync Detail</a> [] | List of content links that failed to update, including error details.   | Small, 65.0              | 65.0              |
| reference<br>ObjectId          | String   | ID of the sObjects that were updated.   | Small, 65.0              | 65.0              |
| saveCommitted                  | Boolean  | Indicates whether successful transactions were committed to the database ( <code>true</code> ) or not ( <code>false</code> ). | Small, 65.0              | 65.0              |
| successContent<br>LinkDataList | <a href="#">Content Link Data Sync Detail</a> [] | List of content links that were successfully updated.   | Small, 65.0              | 65.0              |

## Content Link Data Sync Detail

Output representation that contains content link details for the requested IDs.

### JSON example

```
{
  "contentLinkId": "6UPxx0000004CCGGA2",
  "value": "3",
  "isSuccess": false,
  "failureReason": "Contract Term: value not of required type: 3"
}
```

| Property Name | Type    | Description  | Filter Group and Version | Available Version |
|---------------|---------|--|--------------------------|-------------------|
| contentLinkId | String  | Record ID of the content link.   | Small, 65.0              | 65.0              |
| failureReason | String  | Reason for the failure, if the <code>isSuccess</code> property value is <code>false</code> .                   | Small, 65.0              | 65.0              |
| isSuccess     | Boolean | Indicates whether the data sync validation was successful ( <code>true</code> ) or not ( <code>false</code> ). | Small, 65.0              | 65.0              |
| value         | String  | Represents the data for the content.   | Small, 65.0              | 65.0              |

## Content Link List

Output representation of the content data for the specified reference IDs.

### JSON Sample

```
{
  "contentLinkDataList": [
    {
      "contentLinkId": "0D56A000008yhfsAAQ",
      "content": "Content data here"
    }
  ]
}
```

```

],
"failedContentLinkList": [
  {
    "failedContentLinkId": "0D56A000008yhgTABQ",
    "failureReason": "Access denied"
  }
],
"referenceObjectId": "a0X4W00000X8jklUAB"
}

```

| Property Name             | Type                                       | Description                   | Filter Group and Version | Available Version |
|---------------------------|--|-------------------------------|--------------------------|-------------------|
| contentLink<br>DataList   | <a href="#">Content Link Detail[]</a>      | List of content links.        | Small, 62.0              | 62.0              |
| failedContent<br>LinkList | <a href="#">Failed Content Link List[]</a> | List of failed content links. | Small, 62.0              | 62.0              |
| reference<br>ObjectId     | String                                     | ID of the reference object.   | Small, 62.0              | 62.0              |

## Content Link Detail

Output representation of the content link details for the specified reference IDs.

### JSON Sample

```

{
  "contentLinkDataList": [
    {
      "contentLinkId": "0D56A000008yhfSAAQ",
      "content": "Content data here"
    }
  ]
}

```

| Property Name | Type   | Description                         | Filter Group and Version | Available Version |
|---------------|--------|-------------------------------------|--------------------------|-------------------|
| content       | String | Data of the fetched content.        | Small, 62.0              | 62.0              |
| contentLinkId | String | Record ID of the content link data. | Small, 62.0              | 62.0              |

## Contract Action List

List of contract actions.

| Property Name | Type                              | Description                | Filter Group and Version | Available Version |
|---------------|-----------------------------------|----------------------------|--------------------------|-------------------|
| actions       | <a href="#">Contract Action[]</a> | Specifies list of actions. | Big, 56.0                | 56.0              |

| Property Name | Type   | Description                   | Filter Group and Version | Available Version |
|---------------|--------|-------------------------------|--------------------------|-------------------|
| contractId    | String | Indicates ID of the contract. | Small, 56.0              | 56.0              |

### JSON example

```
{
  "actions": [
    {
      "apiName": "cancelContract",
      "uiText": "Cancel Contract"
    },
    {
      "apiName": "submitForApproval",
      "uiText": "Submit for Approval"
    }
  ],
  "contractId": "800R0000000U7FaYAK"
}
```

### Contract Action Response

Contract action response for a particular contract ID.

| Property Name | Type   | Description                   | Filter Group and Version | Available Version |
|---------------|--------|-------------------------------|--------------------------|-------------------|
| apiName       | String | API name for an action.       | Big, 56.0                | 56.0              |
| uiText        | String | Localized text for an action. | Big, 56.0                | 56.0              |

### Contract Document Version

Contract document version record.

| Property Name             | Type   | Description   | Filter Group and Version | Available Version |
|---------------------------|--------|---|--------------------------|-------------------|
| contractDocumentVersionId | String | Record ID of contract document version.             | Small, 56.0              | 56.0              |
| contractId                | String | Record ID of parent contract.                       | Small, 56.0              | 56.0              |
| createdByFullName         | String | Status of contract document version.                | Small, 56.0              | 56.0              |
| createdDate               | String | Created date of contract document version.          | Small, 56.0              | 56.0              |
| creationProcessType       | String | Creation process type of contract document version. | Small, 56.0              | 56.0              |
| documentTemplateId        | String | Template Id used for contract document version.     | Small, 56.0              | 56.0              |

| Property Name           | Type    | Description  | Filter Group and Version | Available Version |
|-------------------------|---------|--|--------------------------|-------------------|
| isDocumentVersionLocked | Boolean | The isDocumentVersionLocked flag of contract document version. | Small, 56.0              | 56.0              |
| lastModifiedDate        | String  | Last modified date of contract document version.               | Small, 56.0              | 56.0              |
| lockType                | String  | Lock type of contract document version                         | Small, 56.0              | 56.0              |
| lockedByUserName        | String  | Name of the user who locked the contract document version.     | Small, 56.0              | 56.0              |
| name                    | String  | Version name of contract document version.                     | Small, 56.0              | 56.0              |
| status                  | String  | Status of contract document version.                           | Small, 56.0              | 56.0              |
| versionNumber           | String  | Version number of contract document version.                   | Small, 56.0              | 56.0              |

## Contract Document Version CC Response

Output representation of the latest details of a contract document version, including its ID, status, and associated documents and attachments.

### JSON Sample

```
{
  "contractId": "contractId_value",
  "contractDocumentVersionId": "contractDocumentVersionId_value",
  "status": "",
  "contractDocuments": [
    {
      "contentDocumentId": "contentDocumentId_value1",
      "contractDocumentVersionId": "contractDocumentVersionId_value1",
      "createdDate": "createdDate_value1",
      "fileExtension": "fileExtension_value1",
      "lastModifiedDate": "lastModifiedDate_value1",
      "title": "title_value1",
      "isSharedExternally": true
    }
  ],
  "attachments": [
    {
      "contentDocumentId": "contentDocumentId_value2",
      "contractDocumentVersionId": "contractDocumentVersionId_value2",
      "createdDate": "createdDate_value2",
      "fileExtension": "fileExtension_value2",
      "lastModifiedDate": "lastModifiedDate_value2",
      "title": "title_value2",
      "isSharedExternally": true
    }
  ]
}
```

| Property Name               | Type  | Description   | Filter Group and Version | Available Version |
|-----------------------------|---|---|--------------------------|-------------------|
| attachments                 | <a href="#">Content Document Response[]</a> | Details of the list of attachments associated with the contract document version. | Big, 60.0                | 60.0              |
| contract Documents          | <a href="#">Content Document Response[]</a> | Details of the list of documents associated with the contract.                    | Big, 60.0                | 60.0              |
| contract Document VersionId | String                                      | Record ID of the associated contract document version.                            | Small, 60.0              | 60.0              |
| contract Documents          | <a href="#">Content Document Response[]</a> | Details of the list of documents associated with the contract.                    | Big, 60.0                | 60.0              |
| contractId                  | String                                      | Record ID of the parent contract.   | Small, 60.0              | 60.0              |
| name                        | String                                      | Version name of the contract document version.                                    | Small, 60.0              | 60.0              |
| status                      | String                                      | Status of the contract document version.  | Small, 60.0              | 60.0              |

## Contract Document Versions List

Contract document versions record list.

| Property Name | Type   | Description   | Filter Group and Version | Available Version |
|---------------|--|---|--------------------------|-------------------|
| contractId    | String   | Contract ID for which list of contract document versions fetched.   | Big, 56.0                | 56.0              |
| data          | <a href="#">Contract Document Version Response[]</a> | List of contract document versions details related to the contract. | Big, 56.0                | 56.0              |

## Contract List

Contract list.

### JSON example

```
{
  "data": ['yId1']
}
```

| Property Name | Type     | Description                 | Filter Group and Version | Available Version |
|---------------|----------|-----------------------------|--------------------------|-------------------|
| data          | String[] | Record IDs of the contacts. | Small, 56.0              | 56.0              |

## Document Clause Fields Response

Output representation for the list of document clause fields.

### JSON example

```
{
  "fieldValues": [
    "english",
    "spanish",
    "german"
  ]
}
```

| Property Name | Type     | Description   | Filter Group and Version | Available Version |
|---------------|----------|---|--------------------------|-------------------|
| fieldValues   | String[] | The values returned for the document clause fields based on the query parameter specified in the request. | Small, 57.0              | 57.0              |

## Document Clause Set List Response

Output representation for the list of document clause set.

### JSON example

```
{
  "documentClauseSets": [
    {
      "id": "123",
      "name": "Governing Law",
      "category": "00x40Axgdg0538F",
      "categoryName": "Confidential",
      "defaultLanguage": "English",
      "status": "Active"
    },
    {
      "id": "124",
      "name": "Governing Market Place",
      "category": "00x40Axgdg0538F",
      "categoryName": "Confidential",
      "defaultLanguage": "English",
      "status": "Active"
    }
  ]
}
```

| Property Name      | Type   | Description                      | Filter Group and Version | Available Version |
|--------------------|--|----------------------------------|--------------------------|-------------------|
| documentClauseSets | <a href="#">Document Clause Set Response[]</a> | The list of document clause set. | Small, 57.0              | 57.0              |

## Document Clause Set Response

Output representation of the details of a clause set.

| Property Name   | Type   | Description   | Filter Group and Version | Available Version |
|-----------------|--------|---|--------------------------|-------------------|
| category        | String | The category of the document clause set.  | Small, 57.0              | 57.0              |
| categoryName    | String | The category name of the document clause set.   | Small, 57.0              | 57.0              |
| defaultLanguage | String | The default language of the document clause set.  | Small, 57.0              | 57.0              |
| id              | String | The ID of the document clause set.  | Small, 57.0              | 57.0              |
| name            | String | The name of the document clause set.  | Small, 57.0              | 57.0              |
| status          | String | The status of the document clause set.<br>Valid values are: <ul style="list-style-type: none"> <li>• Draft</li> <li>• Active</li> <li>• Archived</li> </ul> | Small, 57.0              | 57.0              |

## Document Generate

Output Representation of document generation record.

| Property Name             | Type                                | Description   | Filter Group and Version | Available Version |
|---------------------------|-------------------------------------|---|--------------------------|-------------------|
| contentDocuments          | <a href="#">Document Response[]</a> | List of generated content document details associated to the contract document version. | Big, 56.0                | 56.0              |
| contractDocumentVersionId | String                              | Record ID of contract document version.   | Small, 56.0              | 56.0              |
| contractId                | String                              | Record ID of contract.  | Small, 56.0              | 56.0              |
| jobId                     | String                              | Job ID of generate document process en-queued after contract document version creation. | Small, 56.0              | 56.0              |

## Document Generation Process Status

Status of the document generation process.

| Property Name               | Type                                | Description  | Filter Group and Version | Available Version |
|-----------------------------|-------------------------------------|--|--------------------------|-------------------|
| contentDocuments            | <a href="#">Document Response[]</a> | List of generated content document details related to the contract document version. | Big, 56.0                | 56.0              |
| contractDocumentVersionId   | String                              | ID of the contract document version.   | Small, 56.0              | 56.0              |
| documentGenerationProcessId | String                              | ID of the document generation process.   | Small, 56.0              | 56.0              |
| name                        | String                              | Name of the contract document.   | Small, 56.0              | 56.0              |
| responseText                | String                              | Response text.   | Small, 56.0              | 56.0              |
| status                      | String                              | Status of the document generation process.   | Small, 56.0              | 56.0              |

## Document List

Document record list.

| Property Name | Type                                | Description  | Filter Group and Version | Available Version |
|---------------|-------------------------------------|--|--------------------------|-------------------|
| documents     | <a href="#">Document Response[]</a> | List of documents related to the source object ID. | Large, 56.0              | 56.0              |

## Document Recipient Status

Output representation of recipient status and sequence information for the signers.

### Sample Response

```
{
  "isCurrentUserRecipient": "true",
  "hasCurrentUserSigned": "true",
  "recipientSequence": "4",
  "precedingSignersExists": "true",
  "preceedingSignersSigned": "true",
  "Recipients": [
    {
      "Name": "Rishyv Misrep",
      "email": "rishyv@salesforce.com",
      "status": "Signed",
      "finalStatusDateTime": ""
    }
  ]
}
```

| Property Name               | Type                                  | Description  | Filter Group and Version | Available Version |
|-----------------------------|---------------------------------------|--|--------------------------|-------------------|
| contract Document VersionId | String                                | Record ID of the contract document version.  | Small, 61.0              | 61.0              |
| hasCurrent UserSigned       | Boolean                               | Indicates whether the current user has signed the document ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> .              | Small, 61.0              | 61.0              |
| isCurrent UserRecipient     | Boolean                               | Indicates whether the current user is also a signer ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> .                     | Small, 61.0              | 61.0              |
| preceding SignersExists     | Boolean                               | Indicates whether the document is signed by preceding signers ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> .           | Small, 61.0              | 61.0              |
| preceding SignersSigned     | Boolean                               | Indicates whether all preceding signers have completed their signatures ( <code>true</code> ) or not ( <code>false</code> ). The default value is <code>false</code> . | Small, 61.0              | 61.0              |
| recipient Sequence          | Integer                               | Sequence number of the current user.   | Small, 61.0              | 61.0              |
| recipients                  | <a href="#">Recipients Response[]</a> | List of all the signers involved in the contract document.   | Big, 61.0                | 61.0              |

## Document Record

Document record.

### Response example

```
{
  "documents":
  [
    {
      "name": "docx-template",
      "sourceId": "800xx000000boTRAAY",
      "fileExtension": "docx",
      "sourceType": "Content",
      "additionalFields":
      {
        "key1": "value1"
      }
    },
    {
      "name": "annual-contract-doc",
      "sourceId": "800xx000000boQTFGS",
      "fileExtension": "pdf",
    }
  ]
}
```

```

    "sourceType": "Content",
    "additionalFields":
      {
        "key1": "value1",
        "key2": "value2"
      }
  ]
}

```

### Properties

| Property Name    | Type                | Description  | Filter Group and Version | Available Version |
|------------------|---------------------|--|--------------------------|-------------------|
| additionalFields | Map<String, String> | Additional fields related to document for custom implementation. | Big, 56.0                | 56.0              |
| fileExtension    | String              | The file extension of document.                                  | Small, 56.0              | 56.0              |
| name             | String              | The name of document.  | Small, 56.0              | 56.0              |
| sourceId         | String              | The source ID of document.                                       | Small, 56.0              | 56.0              |
| sourceType       | String              | The source type of document.                                     | Small, 56.0              | 56.0              |

### Document Template List

Output representation for the document template list.

| Property Name | Type  | Description                               | Filter Group and Version | Available Version |
|---------------|---|---|--------------------------|-------------------|
| data          | <a href="#">Document Template Parent</a> [] | List of document template parent records. | Small, 60.0              | 60.0              |
| next          | String                                      | The URL to the next page of records.      | Small, 60.0              | 60.0              |
| totalRecord   | Integer                                     | Total number of records fetched.          | Small, 60.0              | 60.0              |

### Document Template Parent

Output representation of the document template parent record.

| Property Name   | Type    | Description  | Filter Group and Version | Available Version |
|-----------------|---------|--|--------------------------|-------------------|
| hasMoreVersions | Boolean | Indicates whether the document template parent record has more draft and archive versions ( <code>true</code> ) or not ( <code>false</code> ). | Small, 60.0              | 60.0              |

| Property Name                 | Type                                       | Description  | Filter Group and Version | Available Version |
|-------------------------------|--|--|--------------------------|-------------------|
| <code>isActive</code>         | Boolean                                    | Indicates whether the the document template parent record is currently active ( <code>true</code> ) or not ( <code>false</code> ). | Small, 60.0              | 60.0              |
| <code>lastModifiedDate</code> | String                                     | Last modified date of the document template parent record.   | Small, 60.0              | 60.0              |
| <code>name</code>             | String                                     | Name of the document template parent record.   | Small, 60.0              | 60.0              |
| <code>namespace</code>        | String                                     | Namespace associated with the document template parent record.   | Small, 60.0              | 60.0              |
| <code>type</code>             | String                                     | Type of the document template parent record.   | Small, 60.0              | 60.0              |
| <code>usageType</code>        | String                                     | Usage type of the document template parent record.   | Small, 60.0              | 60.0              |
| <code>versions</code>         | <a href="#">Document Template Child</a> [] | List of versions associated to the document template parent record.  | Small, 60.0              | 60.0              |

## Document Template Child

Output representation of the document template child record.

| Property Name             | Type   | Description   | Filter Group and Version | Available Version |
|---------------------------|--------|---|--------------------------|-------------------|
| <code>id</code>           | String | ID of the document template child record.                 | Small, 60.0              | 60.0              |
| <code>lastModified</code> | String | Last modified date of the document template child record. | Small, 60.0              | 60.0              |
| <code>name</code>         | String | Name of the document template child record.               | Small, 60.0              | 60.0              |
| <code>status</code>       | String | Status of the document template child record.             | Small, 60.0              | 60.0              |

## Document Template

Output representation for the document template record.

| Property Name                   | Type   | Description                         | Filter Group and Version | Available Version |
|---------------------------------|--------|-------------------------------------|--------------------------|-------------------|
| <code>documentTemplateId</code> | String | ID of the document template record. | Small, 60.0              | 60.0              |

## Envelope Details

Envelope details.

| Property Name  | Type   | Description   | Filter Group and Version | Available Version |
|----------------|--------|---|--------------------------|-------------------|
| envelopeId     | String | Envelope ID for the ongoing DocuSign transaction.     | Small, 56.0              | 56.0              |
| envelopeStatus | String | Envelope status for the ongoing DocuSign transaction. | Small, 56.0              | 56.0              |

## Envelope Status List

Output representation of the envelope status update request.

### JSON example

```
{
  "totalEnvelopesToBeUpdated": "",
  "totalEnvelopesUpdated": "",
  "signatureStatus": {
    "envelopeId1": {
      "success": false,
      "error": "errorcode",
      "message": "errormessage"
    },
    "envelopeId2": {
      "success": true,
      "status": "Completed"
    }
  }
}
```

| Property Name             | Type                              | Description                                     | Filter Group and Version | Available Version |
|---------------------------|-----------------------------------|---|--------------------------|-------------------|
| signatureStatus           | <a href="#">Envelope Status[]</a> | List of all the envelope IDs with their status. | Small, 56.0              | 56.0              |
| sourceObjectId            | String                            | ID of the parent object.                        | Small, 56.0              | 56.0              |
| totalEnvelopesToBeUpdated | Integer                           | Total number of envelopes to be updated.        | Small, 56.0              | 56.0              |
| totalEnvelopesUpdated     | Integer                           | Actual count of envelopes updated.              | Small, 56.0              | 56.0              |

## Envelope Status

Output representation of the envelope status record.

| Property Name | Type   | Description   | Filter Group and Version | Available Version |
|---------------|--------|---|--------------------------|-------------------|
| envelopeId    | String | The ID of the envelope for which the e-signature status is updated. | Small, 56.0              | 56.0              |
| error         | String | Error code corresponding to the envelope ID.                        | Small, 56.0              | 56.0              |

| Property Name | Type    | Description   | Filter Group and Version | Available Version |
|---------------|---------|---|--------------------------|-------------------|
| errorMessage  | String  | Error message corresponding to the envelope ID.   | Small, 56.0              | 56.0              |
| status        | String  | Updated envelope status.  | Small, 56.0              | 56.0              |
| success       | Boolean | Indicates whether the envelope is successfully updated ( <code>true</code> ) or not ( <code>false</code> ). | Small, 56.0              | 56.0              |

## Envelope Void

Void envelope related details.

| Property Name            | Type                              | Description  | Filter Group and Version | Available Version |
|--------------------------|-----------------------------------|--|--------------------------|-------------------|
| failedEnvelopeList       | <a href="#">Envelope Status[]</a> | List of envelopes that failed to void and their details. | Small, 56.0              | 56.0              |
| sourceObjectId           | String                            | ID of the parent object.                                 | Small, 56.0              | 56.0              |
| successfulEnvelopeIds    | String[]                          | ID of envelopes successfully voided.                     | Small, 56.0              | 56.0              |
| totalEnvelopesToBeVoided | Integer                           | Total number of envelopes to be voided.                  | Small, 56.0              | 56.0              |
| totalEnvelopesVoided     | Integer                           | Actual count of envelopes voided.                        | Small, 56.0              | 56.0              |

## External Document Creation Output

Output representation for the create external document request.

### JSON example

```
{
  "isSuccess": true,
  "message": "",
  "ssoLinkUrl": "",
  "ExternalDocumentDTO": {
    "contentVersionId": "",
    "ExternalDocumentId": "",
    "ExternalUserId": "",
    "referenceObjectId": "",
    "referenceObjectType": "",
    "url": "",
    "eTag": ""
  }
}
```

| Property Name           | Type    | Description  | Filter Group and Version | Available Version |
|-------------------------|---------|--|--------------------------|-------------------|
| externalDocumentDetails | Object  | Details of the external document record that is created.   | Small, 58.0              | 58.0              |
| isSuccess               | Boolean | Indicates whether the external document is created successful ( <code>true</code> ) or not ( <code>false</code> ). | Small, 58.0              | 58.0              |
| message                 | String  | Provides a description of the error message in case of failure   | Small, 58.0              | 58.0              |
| ssoLinkUrl              | String  | <Need description>.  | Small, 58.0              | 58.0              |

## External Document Output

Output representation of the details of an external document.

### JSON example

```
{
  "contentVersionId": "",
  "externalDocumentId": ""
  "externalUserId": ""
  "referenceObjectId": ""
  "referenceObject": ""/ContractDocumentVersion", "DocumentTemplate"
  "url": ""
}
```

| Property Name      | Type   | Description                               | Filter Group and Version | Available Version |
|--------------------|--------|---|--------------------------|-------------------|
| contentVersionId   | String | ID of the salesforce content version.     | Small, 58.0              | 58.0              |
| externalDocumentId | String | ID of the external document record.       | Small, 58.0              | 58.0              |
| externalUserId     | String | ID of an external user.                   | Small, 58.0              | 58.0              |
| referenceObject    | String | API name for salesforce reference object. | Small, 58.0              | 58.0              |
| referenceObjectId  | String | ID of the salesforce reference object.    | Small, 58.0              | 58.0              |
| url                | String | URL for the external document.            | Small, 58.0              | 58.0              |

## External Document Review CC

Output representation for external document version review.

### Sample Response

```
{
  "contentVersionId": "11RSB0000008rQX2AY",
  "externalDocumentId": "11nSB000001as69YAA",
}
```

```

"contractDocumentVersionId": "a3k5g000000QyRSAA0",
"url": "https://www.salesforce.com",
"isReviewCompletedByCurrentUser": "true"
}

```

| Property Name                  | Type    | Description   | Filter Group and Version | Available Version |
|--------------------------------|---------|---|--------------------------|-------------------|
| contentVersionId               | String  | Record ID of content version associated with an external document.  | Small, 61.0              | 61.0              |
| contractDocumentVersionId      | String  | Record ID of the contract document version.   | Small, 61.0              | 61.0              |
| externalDocumentId             | String  | Record ID of the external document.   | Small, 61.0              | 61.0              |
| isReviewCompletedByCurrentUser | Boolean | Indicates whether the current user has completed the review for the document ( <code>true</code> ) or not ( <code>false</code> ). | Small, 61.0              | 61.0              |
| url                            | String  | URL of the external document.   | Big, 61.0                | 61.0              |

## Extraction Context Attribute

Output representation of extraction context attribute mapping.

### Sample Response

```

{
  "contextAttributeMapping": [
    {
      "attributeName": "ContractName",
      "attributeId": "11nxx000001hOozAAE",
      "targetObjectField": "Contract",
      "description": "extract startDate from the document",
      "isCustom": false
    },
    {
      "attributeName": "ContractCustomField",
      "attributeId": "11nxx000001hOozAAE",
      "targetObjectField": "Contract",
      "description": "extract startDate from the document",
      "isCustom": true
    },
    {
      "attributeName": "Description",
      "attributeId": "11nxx000001hOozAAE",
      "targetObjectField": "Contract",
      "description": "extract startDate from the document",
      "isCustom": false
    }
  ]
}

```

```

    ]
  }

```

| Property Name         | Type    | Description  | Filter Group and Version | Available Version |
|-----------------------|---------|--|--------------------------|-------------------|
| attributeId           | String  | ID of the extraction context attribute.  | Small, 61.0              | 61.0              |
| attributeName         | String  | Name of the extraction context attribute.  | Small, 61.0              | 61.0              |
| description           | String  | Description of the extraction attribute mapping.   | Small, 61.0              | 61.0              |
| isCustom              | Boolean | Indicates whether the attribute is a custom field ( <code>true</code> ) or not ( <code>false</code> ). | Small, 61.0              | 61.0              |
| target<br>ObjectField | String  | Target object field mapped to the attribute.   | Small, 61.0              | 61.0              |

## Extraction Context Definition

Output representation of extraction context definition details.

### Sample Response

```

{
  "developerName": "CLM_Contract_Definition",
  "id": "a3j5g000000PxQLAA0",
  "name": "Contract Definition"
}

```

| Property Name | Type   | Description  | Filter Group and Version | Available Version |
|---------------|--------|--|--------------------------|-------------------|
| developerName | String | Developer name of the extraction context definition. | Small, 61.0              | 61.0              |
| id            | String | ID of the context definition.                        | Small, 61.0              | 61.0              |
| name          | String | Name of the context definition.                      | Small, 61.0              | 61.0              |

## Extraction Context Mapping

Output representation of mapping details within an extraction context, used to associate extracted data with specific system entities.

### Sample Response

```

{
  "id": "a3k5g000000QyRSAA0",
  "name": "Contract Mapping"
}

```

| Property Name | Type   | Description                             | Filter Group and Version | Available Version |
|---------------|--------|---|--------------------------|-------------------|
| id            | String | ID of the extraction context mapping.   | Small, 61.0              | 61.0              |
| name          | String | Name of the extraction context mapping. | Small, 61.0              | 61.0              |

## Extraction Context Mapping Output

Output representation of extraction context mapping.

### Sample Response

```
{
  "contextUseCaseMapping": {
    "templateName": "ContractExtractionTemplate",
    "targetObject": "Contract",
    "recordType": "CLM",
    "contextDefinitionName": {
      "id": "110xx0000007MnhEAE",
      "developerName": "David Taylor",
      "name": "Dav"
    },
  },
  "contextMapping": {
    "id": "110xx0000007MnhEAE",
    "name": "David Taylor"
  }
},
"contextAttributeMapping": [
  {
    "attributeName": "ContractName",
    "attributeId": "11nxx000001hOozAAE",
    "targetObjectField": "Contract",
    "description": "extract startDate from the document",
    "isCustom": false
  },
  {
    "attributeName": "ContractCustomField",
    "attributeId": "11nxx000001hOozAAE",
    "targetObjectField": "Contract",
    "description": "extract startDate from the document",
    "isCustom": true
  },
  {
    "attributeName": "Description",
    "attributeId": "11nxx000001hOozAAE",
    "targetObjectField": "Contract",
    "description": "extract startDate from the document",
    "isCustom": false
  }
],
"isSuccess": true,
"contextUseCaseMappingId": "ContextUseCaseMappingId"
}
```

| Property Name           | Type  | Description   | Filter Group and Version | Available Version |
|-------------------------|---|---|--------------------------|-------------------|
| contextAttributeMapping | <a href="#">Context Attribute Mapping[]</a>         | List of extraction context attribute mappings..   | Small, 61.0              | 61.0              |
| contextUseCaseMapping   | <a href="#">Extraction Context Use Case Mapping</a> | Details of extraction context use case mapping.   | Small, 61.0              | 61.0              |
| contextUseCaseMappingId | String  | Record ID of the context use case mapping.  | Small, 61.0              | 61.0              |
| isSuccess               | Boolean   | Indicates whether the retrieval of mapping was successful ( <code>true</code> ) or not <code>false</code> . | Small, 61.0              | 61.0              |

## Extraction Context Mappings

Output Representation to create and update extraction context mapping.

### Sample Response

```
{
  "id": "map123",
  "isSuccess": true,
  "message": ""
}
```

| Property Name | Type    | Description  | Filter Group and Version | Available Version |
|---------------|---------|--|--------------------------|-------------------|
| id            | String  | ID of the created mapping.   | Small, 61.0              | 61.0              |
| isSuccess     | Boolean | Indicates whether the mapping creation was successful ( <code>true</code> ) or not ( <code>false</code> ). | Small, 61.0              | 61.0              |
| message       | String  | Details of any error or warning messages.  | Small, 61.0              | 61.0              |

## Extraction Context Use Case Mapping

Output representation of extraction context use case mapping.

### Sample Response

```
{
  "contextUseCaseMapping": {
    "templateName": "ContractExtractionTemplate",
    "targetObject": "Contract",
    "recordType": "CLM",
    "contextDefinitionName": {
      "id": "110xx0000007MnhEAE",
      "developerName": "David Taylor",
    }
  }
}
```

```

    "name": "Dav"
  },
  "contextMapping": {
    "id": "110xx0000007MnhEAE",
    "name": "David Taylor"
  }
}

```

| Property Name      | Type  | Description   | Filter Group and Version | Available Version |
|--------------------|---|---|--------------------------|-------------------|
| context Definition | <a href="#">Extraction Context Definition</a> | Details of the extraction context definition.                 | Small, 61.0              | 61.0              |
| context Mapping    | <a href="#">Extraction Context Mapping</a>    | Details of the extraction context mapping.                    | Small, 61.0              | 61.0              |
| recordType         | String  | Name of the record type associated with the use case mapping. | Small, 61.0              | 61.0              |
| targetObject       | String  | Name of the target object for the use case mapping.           | Small, 61.0              | 61.0              |
| templateName       | String  | Name of the template associated with the use case mapping.    | Small, 61.0              | 61.0              |

## Failed Content Link List

Output representation of the content ID and error details for the failed requests.

### JSON Sample

```

{
  "failedContentLinkList": [
    {
      "failedContentLinkId": "0D56A000008yhgTABQ",
      "failureReason": "Access denied"
    }
  ]
}

```

| Property Name       | Type   | Description   | Filter Group and Version | Available Version |
|---------------------|--------|---|--------------------------|-------------------|
| failedContentLinkId | String | ID of the content link associated with the failure.             | Small, 62.0              | 62.0              |
| failureReason       | String | Reason for the API request's failure to fetch the content link. | Small, 62.0              | 62.0              |

## Generic Output

Generic output response.

| Property Name | Type    | Description   | Filter Group and Version | Available Version |
|---------------|---------|---|--------------------------|-------------------|
| id            | String  | ID of the content document being shared or unshared.  | Small, 56.0              | 56.0              |
| isSuccess     | Boolean | Indicates whether the API request was successful ( <code>true</code> ) or not ( <code>false</code> ). | Small, 56.0              | 56.0              |

## Recipient Details

Recipient details.

| Property Name    | Type               | Description  | Filter Group and Version | Available Version |
|------------------|--------------------|--|--------------------------|-------------------|
| additionalFields | Map<String,String> | Recipient additional fields.                                   | Big, 56.0                | 56.0              |
| email            | String             | Email address of the recipient.                                | Small, 56.0              | 56.0              |
| id               | String             | Unique ID used by the tab element to indicate which recipient. | Small, 56.0              | 56.0              |
| name             | String             | Name of the recipient.   | Small, 56.0              | 56.0              |

## Recipient List

List of recipients.

### JSON example

```
{
  "recipients": [
    {
      "id": "xxxx",
      "name": "somename",
      "email": "someemail",
      "additionalFields": {
        "key1": "value1"
      }
    },
    .....
    {
      "id": "yyyy",
      "name": "somename1",
      "email": "someemail1",
      "additionalFields": {
        "key1": "value1"
      }
    }
  ]
}
```

```

    ]
  }
}

```

| Property Name | Type                                | Description         | Filter Group and Version | Available Version |
|---------------|-------------------------------------|---------------------|--------------------------|-------------------|
| recipients    | <a href="#">Recipient Details[]</a> | List of recipients. | Big, 56.0                | 56.0              |

## Recipients Response

Output representation of a recipient's personal and status information in a contract document's signing process.

### Sample Response

```

{
  "Name": "Rishyv Misrep",
  "email": "rishyv@salesforce.com",
  "status": "Signed",
  "finalStatusDateTime": ""
}

```

| Property Name       | Type   | Description                                | Filter Group and Version | Available Version |
|---------------------|--------|--|--------------------------|-------------------|
| declinedReason      | String | Declined reason for the signature.         | Small, 61.0              | 61.0              |
| email               | String | Email address of the recipient.            | Small, 61.0              | 61.0              |
| finalStatusDateTime | String | Final date and time of the current status. | Small, 61.0              | 61.0              |
| name                | String | Name of the recipient.                     | Small, 61.0              | 61.0              |
| status              | String | Status of the recipient.                   | Small, 61.0              | 61.0              |
| type                | String | Type of the recipient.                     | Small, 61.0              | 61.0              |

## Save External Document Output

Output representation for save external document operation.

### JSON example

```

{
  "id": "XXXXXXXX",
  "isSuccess": true,
  "message": "XYZ"
}

```

| Property Name | Type    | Description  | Filter Group and Version | Available Version |
|---------------|---------|--|--------------------------|-------------------|
| id            | String  | ID of an external document.                              | Small, 58.0              | 58.0              |
| isSuccess     | Boolean | The isSuccess flag for save external document operation. | Small, 58.0              | 58.0              |
| message       | String  | The response message for save external document.         | Small, 58.0              | 58.0              |

## Signer Roles Details

Details of the e-signature signer roles.

### JSON example

```
{
  "signerRoles": [
    "signer1",
    "signer2",
    "signer3",
    "signer4",
    .....
    "signerN"
  ]
}
```

| Property Name | Type     | Description  | Filter Group and Version | Available Version |
|---------------|----------|--|--------------------------|-------------------|
| signerRoles   | String[] | Indicates the index or order of the signer in the e-signature. | Big, 56.0                | 56.0              |

## Template List

List of configured templates.

| Property Name | Type                       | Description        | Filter Group and Version | Available Version |
|---------------|----------------------------|--------------------|--------------------------|-------------------|
| code          | String                     | API code.          | Small, 56.0              | 56.0              |
| data          | <a href="#">Template[]</a> | List of templates. | Big, 56.0                | 56.0              |
| message       | String                     | API message.       | Small, 56.0              | 56.0              |

## Template Record

Template record.

| Property Name | Type    | Description                | Filter Group and Version | Available Version |
|---------------|---------|----------------------------|--------------------------|-------------------|
| id            | String  | Record ID of the template. | Big, 56.0                | 56.0              |
| isActive      | Boolean | Status of the template.    | Big, 56.0                | 56.0              |
| name          | String  | Name of the template.      | Big, 56.0                | 56.0              |
| type          | String  | Type of the template.      | Big, 56.0                | 56.0              |
| version       | Integer | Version of the template.   | Big, 56.0                | 56.0              |

## E-signature Notification Expiration

E-signature notification expiration settings.

| Property Name | Type    | Description   | Filter Group and Version | Available Version |
|---------------|---------|---|--------------------------|-------------------|
| expireAfter   | Integer | Integer specifying the number of days that a sent envelope remains active before it expires.  | Small, 56.0              | 56.0              |
| expireEnabled | Boolean | Indicates whether the envelope is no longer available for signing after the specified number of days after it was sent.   | Small, 56.0              | 56.0              |
| expireWarn    | Integer | Integer that specifying the number of days before the envelope expires that an expiration warning email is sent to the recipient; if set to 0 (zero), no warning email is sent. | Small, 56.0              | 56.0              |

## E-signature Notification Reminder

E-signature notification reminder settings.

| Property Name     | Type    | Description   | Filter Group and Version | Available Version |
|-------------------|---------|---|--------------------------|-------------------|
| reminderDelay     | Integer | Integer specifying the number of days after the recipient receives the envelope that reminder emails are sent to the recipient. | Small, 56.0              | 56.0              |
| reminderEnabled   | Boolean | Indicates whether a reminder is sent.   | Small, 56.0              | 56.0              |
| reminderFrequency | Integer | Integer specifying the interval in days between reminder emails.  | Small, 56.0              | 56.0              |

## E-signature Notification Settings

E-signature notification settings.

### JSON example

```
{
  "useAccountDefaults": true,
  "reminders": {
    "reminderEnabled": true,
    "reminderDelay": 4,
    "reminderFrequency": 5
  },
  "expirations": {
    "expireEnabled": true,
    "expireAfter": 4,
    "expireWarn": 5
  }
}
```

| Property Name      | Type  | Description   | Filter Group and Version | Available Version |
|--------------------|---|---|--------------------------|-------------------|
| expirations        | <a href="#">Notification Expiration Setting</a> | Expirations settings for notification setting.  | Small, 56.0              | 56.0              |
| reminders          | <a href="#">Notification Reminder Setting</a>   | Reminder settings for notification setting.   | Small, 56.0              | 56.0              |
| useAccountDefaults | Boolean   | Indicates whether the Account defaults for notifications should be used by the envelope [ true   false ]. | Small, 56.0              | 56.0              |

## Salesforce Contracts 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](#).

### [ClauseCatgConfiguration](#)

Represents the configuration about the library category that can be used by a user in their response document.

### [ContextUseCaseMapping](#)

Represents the setup object that stores configuration details for the context service for Salesforce Contracts.

### [ContractType](#)

A contract type is used to group contracts so that they exhibit similar characteristics. For example, the lifecycle states, the people who access, the templates and clauses used. This type extends the Metadata metadata type and inherits its `fullName` field.

### [DocumentTemplate](#)

Represents the document template definitions that enable dynamic document generation from templates within Salesforce organizations.

### [ESignatureConfig](#)

Represents the settings for integrating with external eSignature providers.

### [ESignatureEnvelopeConfig](#)

Represents the notification-specific settings for integrating with external eSignature providers.

### [ExternalDocStorageConfig](#)

Represents configuration, which admin makes in setup to specify the drive, path, and named credential to be used for storing documents on external drives.

### [Flow for Salesforce Contracts](#)

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.

SEE ALSO:

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

## ClauseCatgConfiguration

Represents the configuration about the library category that can be used by a user in their response document.

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

### Parent Type

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

### File Suffix and Directory Location

ClauseCatgConfiguration components have the suffix `.clauseCatgConfiguration` and are stored in the `clauseCatgConfigurations` folder.

### Version

ClauseCatgConfiguration components are available in API version 57.0 and later.

### Special Access Rules

ClauseManagementAddOn license is required.

## Fields

| Field Name  | Description   |
|-------------|---|
| description | <p><b>Field Type</b><br/>string</p> <p><b>Description</b><br/>The description about the clause category configuration.</p>  |
| isProtected | <p><b>Field Type</b><br/>boolean</p> <p><b>Description</b><br/>An auto-generated value that doesn't currently impact the behavior of the metadata type.</p>   |
| masterLabel | <p><b>Field Type</b><br/>string</p> <p><b>Description</b><br/>Required.<br/><br/>A user-friendly name for ClauseCatgConfiguration, which is defined when the ClauseCatgConfiguration is created.</p>  |
| usageType   | <p><b>Field Type</b><br/>ClmCategoryUsageType (enumeration of type string)</p> <p><b>Description</b><br/>Required.<br/><br/>The usage type of the clause category configuration.<br/><br/>Possible values are:</p> <ul style="list-style-type: none"> <li>• ContractClauseCategory</li> <li>• DisclosureCategory</li> </ul> |

## Declarative Metadata Sample Definition

The following is an example of a ClauseCatgConfiguration component.

```
<?xml version="1.0" encoding="UTF-8"?>
<ClauseCatgConfiguration
  xmlns="http://soap.sforce.com/2006/04/metadata">
  <description>This is how to add description for Contract Clause Category</description>
  <usageType>ContractClauseCategory</usageType>
  <isProtected>>false</isProtected>
  <masterLabel>Contract Clause Cat</masterLabel>
</ClauseCatgConfiguration>
```

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

```
<?xml version="1.0" encoding="UTF-8"?>
<Package
  xmlns="http://soap.sforce.com/2006/04/metadata">
  <fullName>Pkg</fullName>
  <types>
    <members>DisclosureCategory</members>
    <members>ContractClauseCategory</members>
    <name>ClauseCatgConfiguration</name>
  </types>
  <version>57.0</version>
</Package>
```

## Wildcard Support in the Manifest File

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

## ContextUseCaseMapping

Represents the setup object that stores configuration details for the context service for Salesforce Contracts.

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

## Parent Type

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

## File Suffix and Directory Location

`ContextUseCaseMapping` components have the suffix `.contextUseCaseMapping` and are stored in the `contextUseCaseMappings` folder.

## Version

`ContextUseCaseMapping` components are available in API version 61.0 and later.

## Special Access Rules

Requires Context Service to be enabled in the organization. This metadata type is specifically designed for contract lifecycle management and is part of the broader Context Service architecture for Industries solutions.

## Fields

| Field Name            | Description   |
|-----------------------|---|
| contextDefinitionName | <p><b>Field Type</b><br/>string</p> <p><b>Description</b><br/>Required</p> <p>Name of the context definition that stores hydration and persistence mapping details. References a ContextDefinition component that describes the relationship between node structures within a context..</p>   |
| mappingName           | <p><b>Field Type</b><br/>string</p> <p><b>Description</b><br/>Required</p> <p>Name of the mapping associated with the mapping type. Examples include <code>OppToCntrHydrationMapping</code> for hydration scenarios and <code>OppToCntrPersistenceMapping</code> for persistence scenarios.</p>   |
| mappingType           | <p><b>Field Type</b><br/>ContextMappingType (enumeration of type string)</p> <p><b>Description</b><br/>Required</p> <p>Mapping type used for context use case mappings. Valid values are:</p> <ul style="list-style-type: none"> <li>• <code>Hydration</code>—Mapping type for data retrieval and population from source objects</li> <li>• <code>Persistence</code>—Mapping type for data storage and updates to target objects</li> </ul> |
| masterLabel           | <p><b>Field Type</b><br/>string</p> <p><b>Description</b><br/>Required</p> <p>User-friendly name for the context use case mapping that appears in the user interface.</p>   |
| referenceObjectName   | <p><b>Field Type</b><br/>string</p> <p><b>Description</b><br/>The standard or custom source object that the context mapping is fetched from. This field represents the originating object for the mapping relationship.</p>   |

| Field Name                  | Description  |
|-----------------------------|--|
| referenceObjectRecordType   | <p><b>Field Type</b><br/>string</p> <p><b>Description</b><br/>The record types associated with the reference object. This field is used for record type-specific mapping configurations within the same object type. Available in API version 61.0 and later.</p>  |
| targetObjectCustomFieldName | <p><b>Field Type</b><br/>string</p> <p><b>Description</b><br/>Name of the custom field in the target object used to link the target object with the reference object. This field must be a valid field in the target object and establishes the relationship between source and target objects.</p>  |
| targetObjectName            | <p><b>Field Type</b><br/>string</p> <p><b>Description</b><br/>Name of the standard or custom object that the context mapping from the reference object is pushed to. This represents the destination object for the mapping relationship, typically the Contract object.</p>   |
| targetObjectRecordType      | <p><b>Field Type</b><br/>string</p> <p><b>Description</b><br/>The record types associated with the target object. This field is used for record type-specific configurations within the target object, typically associated with the Contract object.</p>  |
| useCaseType                 | <p><b>Field Type</b><br/>ContextUseCaseType (enumeration of type string)</p> <p><b>Description</b><br/>Required. Type of use case that defines the purpose and scope of the context mapping. Valid values are:</p> <ul style="list-style-type: none"> <li>• <code>ContractCreationOrUpdation</code>—Use case for creating or updating contracts from source objects</li> <li>• <code>ContractExtraction</code>—Use case for extracting contract data for document generation or other processes</li> </ul> |

## Declarative Metadata Sample Definition

This is an example of a ContextUseCaseMapping component.

```
<?xml version="1.0" encoding="UTF-8"?>
<ContextUseCaseMapping xmlns="http://soap.sforce.com/2006/04/metadata">
  <contextDefinitionName>TestDefName</contextDefinitionName>
  <mappingName>TestMapName</mappingName>
  <mappingType>Hydration</mappingType>
  <masterLabel>TestMLLabel</masterLabel>
  <referenceObjectName>Opportunity</referenceObjectName>
  <referenceObjectRecordType>TestOppRT</referenceObjectRecordType>
  <targetObjectCustomFieldName>SourceOpportunityId</targetObjectCustomFieldName>
  <targetObjectName>Contract</targetObjectName>
  <targetObjectRecordType>TestOppRT</targetObjectRecordType>
  <useCaseType>ContractCreationOrUpdation</useCaseType>
</ContextUseCaseMapping>
```

This is an example package.xml that references the previous definition.

```
<?xml version="1.0" encoding="UTF-8"?>
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
  <fullName>TestPkg</fullName>
  <types>
    <members>Opportunity.TestSalesProcess</members>
    <name>BusinessProcess</name>
  </types>
  <types>
    <members>TestDName</members>
    <name>ContextUseCaseMapping</name>
  </types>
  <types>
    <members>Contract.ContractLifecycleManagement</members>
    <members>Opportunity.TestOppRT</members>
    <name>RecordType</name>
  </types>
  <version>66.0</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](#).

## ContractType

A contract type is used to group contracts so that they exhibit similar characteristics. For example, the lifecycle states, the people who access, the templates and clauses used. This type extends the Metadata metadata type and inherits its `fullName` field.

## Parent Type

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

## File Suffix and Directory Location

ContractType components have the suffix `.contractType` and are stored in the `contractTypes` folder.

## Version

ContractType components are available in API version 54.0 and later.

## Special Access Rules

## Fields

| Field Name                       | Field Type                           | Description  |
|----------------------------------|--------------------------------------|--|
| <code>contractTypeConfigs</code> | <a href="#">ContractTypeConfig[]</a> | A list of configurations for the Contract Type.  |
| <code>isDefault</code>           | boolean                              | Indicates whether this contract type is a default for the org. Default value is False. |
| <code>masterLabel</code>         | string                               | Required. The name of the setting.   |
| <code>subTypes</code>            | string                               | List of subtypes for the contract object associated with this contract type.           |

## ContractTypeConfig

Specific configuration settings defined for a Contract Type that control characteristics and behavior of all contracts of that type.

| Field Name              | Description   |
|-------------------------|---|
| <code>configType</code> | <p><b>Field Type</b><br/>ContractConfigType (enumeration of type string)</p> <p><b>Description</b><br/>Required.<br/>Indicates the name of the configuration setting.<br/>Possible value are:</p> <ul style="list-style-type: none"> <li>• Append0ToAutoNbrEmbeddedSect</li> <li>• AutoGenDocOnContractUpdate</li> <li>• AutoGenDocOnContractCreation</li> <li>• AutoGenerateDocFileType</li> <li>• CheckInDocFileType</li> <li>• CreateDocSectionsDocxTemplates</li> <li>• CompareContractVersionsEnabled</li> <li>• ContractSignatureDeclinedSts</li> <li>• ContractDocumentDownloadOption</li> </ul> |

| Field Name  | Description  |
|-------------|--|
|             | <ul style="list-style-type: none"> <li>• ContractSignatureExpiredStatus</li> <li>• ContractSignatureVoidedStatus</li> <li>• ContractSignedStatus</li> <li>• DefaultTemplateName</li> <li>• DocuSignAccountBrand</li> <li>• DocuSignUseAccountDefaultNtfcn</li> <li>• DocuSignExpiresAfter</li> <li>• DocuSignExpireEnabled</li> <li>• DocumentFileNameFormat</li> <li>• DocuSignExpireWarning</li> <li>• DocuSignReminderDelayinDays</li> <li>• DocuSignReminderEnabled</li> <li>• DocuSignReminderFrequency</li> <li>• DocumentTemplateFilterClass</li> <li>• EmailNotificationOnDocumentGeneration</li> <li>• ImportTargetContractStatus</li> <li>• InclWordTrackChgSectionContent</li> <li>• InclWordTrackChgReconciliation</li> <li>• NotifyDocTemplateVerChgStatus</li> <li>• PrivateExternalReviewCompletionSite</li> <li>• TrackContractRedlines</li> <li>• WordTrackChangesDisplayColor</li> </ul> |
| configValue | <p><b>Field Type</b><br/>string</p> <p><b>Description</b><br/>Required.</p> <p>Indicates the value of the configuration setting specified in the Configuration Name field.</p>   |
| usageType   | <p><b>Field Type</b><br/>ContractUsageType (enumeration of type string)</p> <p><b>Description</b><br/>The usage type to which this setting belongs.</p> <p>Possible value are:</p> <ul style="list-style-type: none"> <li>• DocumentSetting</li> <li>• Reconciliation</li> <li>• Redlining</li> <li>• SignatureSetting</li> </ul>  |

## Declarative Metadata Sample Definition

The following is an example of a ContractType component.

```
<?xml version="1.0" encoding="UTF-8"?>
<ContractType xmlns="http://soap.sforce.com/2006/04/metadata">
  <masterLabel>New_ContractType</masterLabel>
  <isDefault>true</isDefault>
  <subTypes>RecordTypeName1</subTypes>
</ContractType>
```

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>ContractType</name>
  </types>
  <types>
    <members>Contract.RecordTypeName1</members>
    <name>RecordType</name>
  </types>
  <version>54.0</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](#).

## DocumentTemplate

Represents the document template definitions that enable dynamic document generation from templates within Salesforce organizations.

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

### Parent Type

This type extends the MetadataWithContent metadata type and inherits its content and fullName fields.

### File Suffix and Directory Location

DocumentTemplate components have the suffix .dt and are stored in the documentTemplates folder.

### Version

DocumentTemplate components are available in API version 59.0 and later.

## Fields

| Field Name                     | Description  |
|--------------------------------|--|
| contextDefinitionName          | <p><b>Field Type</b><br/>string</p> <p><b>Description</b><br/>Context service definition that describes the relationship between node structures within a context. Available in API version 65.0 and later.</p>  |
| ContextFilterName              | <p><b>Field Type</b><br/>string</p> <p><b>Description</b><br/>The name of the context filter that extracts records in the Context Service token mapping type. For example, filter Line Items with Total Price greater than 1000 and sort by Quantity in descending order. This is optional and applicable only for context token mapping. Available in API version 66.0 and later.</p> |
| contextMappingName             | <p><b>Field Type</b><br/>string</p> <p><b>Description</b><br/>Context service mapping that defines the mapping of attributes and nodes to related objects. Available in API version 65.0 and later.</p>  |
| customClassName                | <p><b>Field Type</b><br/>string</p> <p><b>Description</b><br/>Custom class to process document template operations and transformations.</p>  |
| defaultFontStyle               | <p><b>Field Type</b><br/>string</p> <p><b>Description</b><br/>Default font styling applied to the document template content.</p>   |
| documentConversionResourceName | <p><b>Field Type</b><br/>string</p> <p><b>Description</b><br/>Conversion resource reference used for transforming document content between formats.</p>  |
| documentGenerationMechanism    | <p><b>Field Type</b><br/>DocumentGenerationMechanism (enumeration of type string)</p> <p><b>Description</b><br/>Specifies how documents are generated from the template, defining the generation mechanism and processing approach.</p>  |

| Field Name                   | Description  |
|------------------------------|--|
|                              | <p>Valid values are:</p> <ul style="list-style-type: none"> <li>• ClientSide</li> <li>• ServerSide</li> </ul> <p>The default value is ClientSide.</p>  |
| extractOmniDataTransformName | <p><b>Field Type</b><br/>string</p> <p><b>Description</b><br/>Data extraction transform name for OmniStudio integration, enabling extraction of data from various sources for template processing.</p>   |
| fileExtension                | <p><b>Field Type</b><br/>string</p> <p><b>Description</b><br/>Output file format extension for documents generated from this template.</p>   |
| hasBatchableSection          | <p><b>Field Type</b><br/>boolean</p> <p><b>Description</b><br/>Indicates whether the template supports batch processing of sections (<code>true</code>) or not (<code>false</code>).<br/><br/>The default value is <code>false</code>.</p>           |
| isActive                     | <p><b>Field Type</b><br/>boolean</p> <p><b>Description</b><br/>Indicates whether the template is active and available for document generation (<code>true</code>) or not (<code>false</code>).<br/><br/>The default value is <code>false</code>.</p> |
| isSectionProcessed           | <p><b>Field Type</b><br/>boolean</p> <p><b>Description</b><br/>Indicates whether sections are processed in the template (<code>true</code>) or not (<code>false</code>).<br/><br/>The default value is <code>false</code>.</p>                       |
| lastEmbeddedTplSectionKey    | <p><b>Field Type</b><br/>string</p> <p><b>Description</b><br/>Last processed section key for embedded template processing, used for tracking template section processing state.</p>  |

| Field Name                    | Description   |
|-------------------------------|---|
| mapperOmniDataTransformName   | <p><b>Field Type</b><br/>string</p> <p><b>Description</b><br/>Data mapping transform name for OmniStudio integration, enabling mapping of data between different formats and structures. Available in API version 56.0 and later.</p>               |
| masterLabel                   | <p><b>Field Type</b><br/>string</p> <p><b>Description</b><br/>Display label for the template that appears in the user interface.</p>  |
| name                          | <p><b>Field Type</b><br/>string</p> <p><b>Description</b><br/>Internal name used to identify the template within the system.</p>  |
| namespace                     | <p><b>Field Type</b><br/>string</p> <p><b>Description</b><br/>Package namespace for the template used in managed package deployments.</p>   |
| sectionHeaderFontStyle        | <p><b>Field Type</b><br/>string</p> <p><b>Description</b><br/>Header font styling applied to section headers within the document template.</p>  |
| sectionHeaderFontStyleValue   | <p><b>Field Type</b><br/>string</p> <p><b>Description</b><br/>Header font values and properties for section header styling configuration.</p>   |
| shouldDisplayUnmappedToken    | <p><b>Field Type</b><br/>boolean</p> <p><b>Description</b><br/>Indicates whether unmapped tokens must be displayed in the generated document (<code>true</code>) or not (<code>false</code>).<br/><br/>The default value is <code>false</code>.</p> |
| shouldExtractEmbeddedTplToken | <p><b>Field Type</b><br/>boolean</p>  |

| Field Name                         | Description   |
|------------------------------------|---|
|                                    | <p><b>Description</b></p> <p>Indicates whether embedded template tokens must be extracted during processing (<code>true</code>) or not (<code>false</code>).</p> <p>The default value is <code>false</code>.</p>  |
| <code>status</code>                | <p><b>Field Type</b></p> <p>DocumentTemplateStatus (enumeration of type string)</p> <p><b>Description</b></p> <p>Template status that indicates the current state and availability of the document template.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> <li>• Active</li> <li>• Archived</li> <li>• Draft</li> </ul>   |
| <code>targetTokenItemObject</code> | <p><b>Field Type</b></p> <p>TargetTokenItemObject (enumeration of type string)</p> <p><b>Description</b></p> <p>Target item object for token mapping, defining specific item-level token replacement rules and configurations.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> <li>• OPPORTUNITY_LINE_ITEM</li> <li>• ORDER_LINE_ITEM</li> <li>• QUOTE_LINE_ITEM</li> </ul> |
| <code>targetTokenObject</code>     | <p><b>Field Type</b></p> <p>TargetTokenObject (enumeration of type string)</p> <p><b>Description</b></p> <p>Target object for token mapping, defining the primary object used for token replacement and data binding.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> <li>• CONTRACT</li> <li>• OPPORTUNITY</li> <li>• ORDER</li> <li>• QUOTE</li> </ul>                    |
| <code>tokenList</code>             | <p><b>Field Type</b></p> <p>string</p>  |

| Field Name             | Description   |
|------------------------|---|
|                        | <p><b>Description</b></p> <p>List of available tokens that can be used within the template for dynamic content generation.</p>  |
| tokenMappingMethodType | <p><b>Field Type</b></p> <p>TokenMappingMethodType (enumeration of type string)</p> <p><b>Description</b></p> <p>Token mapping method that defines the approach used for mapping tokens to data values.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> <li>• ContextService</li> <li>• CustomClass</li> <li>• OmniDataTransform</li> </ul> <p>The default value is ContextService.</p>                 |
| tokenMappingType       | <p><b>Field Type</b></p> <p>TokenMappingType (enumeration of type string)</p> <p><b>Description</b></p> <p>Required.</p> <p>Defines how tokens are mapped within the template, specifying the token mapping strategy and configuration.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> <li>• JSON</li> <li>• SalesforceObject</li> </ul>   |
| type                   | <p><b>Field Type</b></p> <p>DocumentTemplateType (enumeration of type string)</p> <p><b>Description</b></p> <p>Required.</p> <p>Type of document template, defining the category and intended use case of the template.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> <li>• HTMLArchive</li> <li>• Microsoft365Word</li> <li>• MicrosoftPowerpoint</li> <li>• MicrosoftWord</li> <li>• Web</li> </ul> |

| Field Name              | Description  |
|-------------------------|--|
| uniqueName              | <p><b>Field Type</b><br/>string</p> <p><b>Description</b><br/>Unique ID of the template, ensuring template uniqueness across the organization.</p>   |
| usageType               | <p><b>Field Type</b><br/>DocumentTemplateUsageType (enumeration of type string)</p> <p><b>Description</b><br/>Defines how the template is used within the system, specifying the usage context and application scenarios.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> <li>• Contract_Lifecycle_Management</li> <li>• Revenue_Lifecycle_Management</li> </ul> |
| versionNumber           | <p><b>Field Type</b><br/>string</p> <p><b>Description</b><br/>Template version number to track template revisions and changes over time.</p>   |
| xmlRelationshipMetadata | <p><b>Field Type</b><br/>string</p> <p><b>Description</b><br/>Relationship metadata in XML format that defines connections and dependencies between template components.</p>   |

## Declarative Metadata Sample Definition

This is an example of a DocumentTemplate component.

```
<?xml version="1.0" encoding="UTF-8"?>
<DocumentTemplate xmlns="http://soap.sforce.com/2006/04/metadata">
  <customClassName></customClassName>
  <defaultFontStyle>'Times New Roman', times, serif</defaultFontStyle>
  <documentConversionResourceName></documentConversionResourceName>
  <documentGenerationMechanism>ClientSide</documentGenerationMechanism>
  <type>MicrosoftWord</type>
  <usageType>Contract_Lifecycle_Management</usageType>
  <extractOmniDataTransformName>extractorv1</extractOmniDataTransformName>
  <mapperOmniDataTransformName>mapperv1</mapperOmniDataTransformName>
  <fileExtension>docx</fileExtension>
  <hasBatchableSection>>false</hasBatchableSection>
  <isActive>>false</isActive>
  <isSectionProcessed>>false</isSectionProcessed>
  <lastEmbeddedTmplSectionKey></lastEmbeddedTmplSectionKey>
  <name>Sample</name>
</DocumentTemplate>
```

```

<namespace></namespace>
<sectionHeaderFontStyle></sectionHeaderFontStyle>
<sectionHeaderFontStyleValue></sectionHeaderFontStyleValue>
<shouldDisplayUnmappedToken>false</shouldDisplayUnmappedToken>
<shouldExtractEmbeddedTmplToken>false</shouldExtractEmbeddedTmplToken>
<status>Draft</status>
<tokenList></tokenList>
<tokenMappingMethodType>OmniDataTransform</tokenMappingMethodType>
<tokenMappingType>JSON</tokenMappingType>
<targetTokenItemObject>OPPORTUNITY_LINE_ITEM</targetTokenItemObject>
<targetTokenObject>CONTRACT</targetTokenObject>
<uniqueName>Sample_1</uniqueName>
<versionNumber>1</versionNumber>
<xmlRelationshipMetadata></xmlRelationshipMetadata>
<masterLabel>Sample_1</masterLabel>
</DocumentTemplate>

```

This 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>DocumentTemplate</name>
  </types>
  <version>66.0</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](#).

## ESignatureConfig

Represents the settings for integrating with external eSignature providers.

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

### Parent Type

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

### File Suffix and Directory Location

ESignatureConfig components have the suffix `.eSignatureConfig` and are stored in the `eSignatureConfigs` folder.

### Version

ESignatureConfig components are available in API version 54.0 and later.

## Special Access Rules

### Fields

| Field Name  | Description   |
|-------------|---|
| configType  | <p><b>Field Type</b><br/>ConfigType (enumeration of type string)</p> <p><b>Description</b><br/>Required.<br/>Indicates the configured setting.<br/>Possible values are:</p> <ul style="list-style-type: none"> <li>• AnchorString</li> <li>• CalloutTimeout</li> <li>• EnvelopesLastPollDate</li> <li>• SignerRoles</li> <li>• SyncFileSizeLimit</li> </ul> |
| configValue | <p><b>Field Type</b><br/>string</p> <p><b>Description</b><br/>Required.<br/>Indicates the value of the configured setting.</p>  |
| description | <p><b>Field Type</b><br/>string</p> <p><b>Description</b><br/>The description for the configuration setting.</p>  |
| groupType   | <p><b>Field Type</b><br/>ConfigGroup (enumeration of type string)</p> <p><b>Description</b><br/>The description for the configuration setting.<br/>Possible values are:</p> <ul style="list-style-type: none"> <li>• AnchorTabSetting</li> <li>• CalloutConfigurationSetup</li> <li>• Envelope</li> <li>• EnvelopeObjectLimits</li> </ul>                   |
| masterLabel | <p><b>Field Type</b><br/>string</p>   |

| Field Name | Description   |
|------------|---|
|            | <p><b>Description</b><br/>Required.</p> <p>Indicates the name of the setting.</p>   |
| vendor     | <p><b>Field Type</b><br/>Vendor (enumeration of type string)</p> <p><b>Description</b><br/>Required.</p> <p>The provider type to which the configuration setting belongs. Currently only DocuSign is supported.</p> |

## Declarative Metadata Sample Definition

The following is an example of an ESignatureConfig component.

```
<?xml version="1.0" encoding="UTF-8"?>
<ESignatureConfig xmlns="http://soap.sforce.com/2006/04/metadata">
  <configType>AnchorString</configType>
  <groupType>AnchorTabSetting</groupType>
  <configValue>12345</configValue>
  <masterLabel>DocuSignAnchorString</masterLabel>
  <vendor>DocuSign</vendor>
  <description>testdescription</description>
</ESignatureConfig>
```

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>ESignatureConfig</name>
  </types>
  <version>54.0</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](#).

## ESignatureEnvelopeConfig

Represents the notification-specific settings for integrating with external eSignature providers.

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

## Parent Type

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

## File Suffix and Directory Location

ESignatureEnvelopeConfig components have the suffix `.eSignatureEnvelopeConfig` and are stored in the `eSignatureEnvelopeConfigs` folder.

## Version

ESignatureEnvelopeConfig components are available in API version 54.0 and later.

## Special Access Rules

## Fields

| Field Name                           | Description   |
|--------------------------------------|---|
| <code>expirationPeriod</code>        | <p><b>Field Type</b><br/>integer</p> <p><b>Description</b><br/>The expiration period for signing.</p>   |
| <code>expirationWarningPeriod</code> | <p><b>Field Type</b><br/>integer</p> <p><b>Description</b><br/>The number of days before expiration for warning notifications.</p>            |
| <code>firstReminderPeriod</code>     | <p><b>Field Type</b><br/>integer</p> <p><b>Description</b><br/>The number of days between envelope delivery and the first reminder email.</p> |
| <code>isExpirationEnabled</code>     | <p><b>Field Type</b><br/>boolean</p> <p><b>Description</b><br/>Indicates whether expiration is enabled.</p>                                   |
| <code>isReminderEnabled</code>       | <p><b>Field Type</b><br/>boolean</p> <p><b>Description</b><br/>Indicates whether reminders are enabled.</p>                                   |

| Field Name                  | Description  |
|-----------------------------|--|
| isVendorDefaultNtfcnEnabled | <p><b>Field Type</b><br/>boolean</p> <p><b>Description</b><br/>Indicates whether the envelope uses account default notification settings.</p>  |
| masterLabel                 | <p><b>Field Type</b><br/>string</p> <p><b>Description</b><br/>Required.<br/>The name of the setting.</p>   |
| reminderIntervalPeriod      | <p><b>Field Type</b><br/>integer</p> <p><b>Description</b><br/>The interval in days between reminder emails.</p>   |
| targetObjectName            | <p><b>Field Type</b><br/>string</p> <p><b>Description</b><br/>Required.<br/>The object to which the eSignature applies, such as an Opportunity, Quote, or Order.</p>   |
| vendor                      | <p><b>Field Type</b><br/>Vendor (enumeration of type string)</p> <p><b>Description</b><br/>Required.<br/>The provider type to which the configuration setting belongs. Currently only DocuSign is supported.</p> |
| vendorAccountIdentifier     | <p><b>Field Type</b><br/>string</p> <p><b>Description</b><br/>The eSignature branding identifier.</p>  |

## Declarative Metadata Sample Definition

The following is an example of an ESignatureEnvelopeConfig component.

```
<?xml version="1.0" encoding="UTF-8"?>
<ESignatureEnvelopeConfig xmlns="http://soap.sforce.com/2021/10/metadata">
  <masterLabel>DocuSign_Contract</masterLabel>
</ESignatureEnvelopeConfig>
```

```

<targetObjectName>Contract</targetObjectName>
<vendorAccountIdentifier>vai</vendorAccountIdentifier>
<isExpirationEnabled>true</isExpirationEnabled>
<expirationPeriod>2</expirationPeriod>
<expirationWarningPeriod>2</expirationWarningPeriod>
<isReminderEnabled>true</isReminderEnabled>
<firstReminderPeriod>2</firstReminderPeriod>
<reminderIntervalPeriod>2</reminderIntervalPeriod>
<isVendorDefaultNtfcnEnabled>true</isVendorDefaultNtfcnEnabled>
<vendor>DocuSign</vendor>
</ESignatureEnvelopeConfig>

```

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/2021/10/metadata">
  <types>
    <members>*</members>
    <name>ESignatureEnvelopeConfig</name>
  </types>
  <version>54.0</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](#).

## ExternalDocStorageConfig

Represents configuration, which admin makes in setup to specify the drive, path, and named credential to be used for storing documents on external drives.

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

### Parent Type

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

### File Suffix and Directory Location

ExternalDocStorageConfig components have the suffix `.externalDocStorageConfig` and are stored in the `externalDocStorageConfigs` folder.

### Version

ExternalDocStorageConfig components are available in API version 57.0 and later.

## Fields

| Field Name                                | Description   |
|---|---|
| <code>documentPath</code>                 | <p><b>Field Type</b><br/>string</p> <p><b>Description</b><br/>Required.</p> <p>The path from the root in the external storage where documents are stored.</p>   |
| <code>externalDocStorageIdentifier</code> | <p><b>Field Type</b><br/>string</p> <p><b>Description</b><br/>Required.</p> <p>The ID of the external document storage.</p>   |
| <code>masterLabel</code>                  | <p><b>Field Type</b><br/>string</p> <p><b>Description</b><br/>Required.</p> <p>A user-friendly name for ExternalDocStorageConfig, which is defined when the ExternalDocStorageConfig is created.</p>  |
| <code>namedCredential</code>              | <p><b>Field Type</b><br/>string</p> <p><b>Description</b><br/>Required.</p> <p>The Named Credential associated with the External Document Storage Configuration. A named credential can be specified as an endpoint to simplify the setup of authenticated call outs.</p> |
| <code>recordType</code>                   | <p><b>Field Type</b><br/>string</p> <p><b>Description</b><br/>The record type associated with the Reference object.</p>   |
| <code>storageDriveType</code>             | <p><b>Field Type</b><br/>StorageDriveType (enumeration of type string)</p> <p><b>Description</b><br/>Required.</p> <p>The external document storage drive.</p> <p>Possible value is:</p> <ul style="list-style-type: none"><li>• MicrosoftOneDrive</li></ul>              |

| Field Name   | Description  |
|--------------|--|
| targetObject | <p><b>Field Type</b><br/>TargetObject (enumeration of type string)</p> <p><b>Description</b><br/>The target object associated with the external document storage.</p> <p>Possible values are:</p> <ul style="list-style-type: none"> <li>• All</li> <li>• Contract</li> <li>• DocumentTemplate</li> <li>• Disclosure</li> <li>• InfoLibraryExternalDocument</li> </ul> |

## Declarative Metadata Sample Definition

The following is an example of a ExternalDocStorageConfig component.

```
<?xml version="1.0" encoding="UTF-8"?>
<ExternalDocStorageConfig
  xmlns="http://soap.sforce.com/2006/04/metadata">
  <documentPath>/Salesforce/Contracts/</documentPath>
  <externalDocStorageIdentifier>ExternalDocIdTest1234</externalDocStorageIdentifier>
  <masterLabel>Contract_Contract_Lifecycle_Management</masterLabel>
  <namedCredential>Salesforce</namedCredential>
  <recordType>ContractLifecycleManagement</recordType>
  <storageDriveType>MicrosoftOneDrive</storageDriveType>
  <targetObject>Contract</targetObject>
</ExternalDocStorageConfig>
```

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

```
<?xml version="1.0" encoding="UTF-8"?>
<Package
  xmlns="http://soap.sforce.com/2006/04/metadata">
  <fullName>ExternalDocStorageConfigObjectPackage</fullName>
  <types>
    <members>Contract_Contract_Lifecycle_Management</members>
    <name>ExternalDocStorageConfig</name>
  </types>
  <version>57.0</version>
</Package>
```

## Wildcard Support in the Manifest File

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

## Flow for Salesforce Contracts

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

### FlowActionCall

Salesforce Contracts exposes additional `actionType` values for the FlowActionCall Metadata type.

| Field Name              | Field Type                                       | Description   |
|-------------------------|--|---|
| <code>actionType</code> | InvokableActionType (enumeration of type string) | <p>Required.</p> <p>The action type. Additional valid values only for Salesforce Contracts includes:</p> <ul style="list-style-type: none"> <li><code>searchContractDocument</code>—Search the latest contract document version based on the user's query.</li> </ul> |

## Salesforce Contracts Tooling API Objects

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

### [ContractTypeConfig](#)


Represents the settings that define the characteristics and behavior of all contracts of that type. This object is available in API version 54.0 and later.

SEE ALSO:

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

### ContractTypeConfig

Represents the settings that define the characteristics and behavior of all contracts of that type. This object is available in API version 54.0 and later.

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

### Supported SOAP API Calls

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

### Supported REST API Methods

DELETE, GET, HEAD, PATCH, POST, Query

## Fields

| Field      | Details  |
|------------|--|
| ConfigType | <p><b>Type</b><br/>picklist</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b><br/>The name of the configuration setting.<br/>Valid values are:</p> <ul style="list-style-type: none"> <li>• ActivateObligationsBasedOnContractStatus</li> <li>• Append0ToAutoNbrEmbeddedSect</li> <li>• AutoGenDocOnContractCreation</li> <li>• AutoGenDocOnContractUpdate</li> <li>• AutoGenerateDocFileType</li> <li>• CheckInDocFileType</li> <li>• CompareContractVersionsEnabled</li> <li>• ContractDocumentDownloadOption</li> <li>• ContractSignatureDeclinedSts</li> <li>• ContractSignatureExpiredStatus</li> <li>• ContractSignatureVoidedStatus</li> <li>• ContractSignedStatus</li> <li>• CreateDocSectionsDocxTemplates</li> <li>• DefaultTemplateName</li> <li>• DocuSignAccountBrand</li> <li>• DocuSignExpireEnabled</li> <li>• DocuSignExpireWarning</li> <li>• DocuSignExpiresAfter</li> <li>• DocuSignReminderDelayinDays</li> <li>• DocuSignReminderEnabled</li> <li>• DocuSignReminderFrequency</li> <li>• DocuSignUseAccountDefaultNtfcn</li> <li>• DocumentFileNameFormat</li> <li>• DocumentTemplateFilterClass</li> <li>• EmailNotificationOnDocumentGeneration</li> <li>• ExternalReviewRequired</li> <li>• ImportTargetContractStatus</li> <li>• InclWordTrackChgReconciliation</li> <li>• InclWordTrackChgSectionContent</li> </ul> |

| Field           | Details  |
|-----------------|--|
|                 | <ul style="list-style-type: none"> <li>• InternalReviewRequired</li> <li>• NotifyDocTemplateVerChgStatus</li> <li>• PrivateExternalReviewCompletionSite</li> <li>• TrackContractRedlines</li> <li>• WordTrackChangesDisplayColor</li> </ul> <p>The default value is ContractDocumentDownloadOption.</p>  |
| ConfigValue     | <p><b>Type</b><br/>textarea</p> <p><b>Properties</b><br/>Create, Nillable, Update</p> <p><b>Description</b><br/>The value of the configuration setting specified in the configuration name field.</p>  |
| ContractTypeId  | <p><b>Type</b><br/>reference</p> <p><b>Properties</b><br/>Create, Filter, Group, Sort</p> <p><b>Description</b><br/>The ID of the related contract type.<br/>This field is a relationship field.</p> <p><b>Relationship Name</b><br/>ContractType</p> <p><b>Relationship Type</b><br/>Master-detail</p> <p><b>Refers To</b><br/>ContractType (the master object)</p>   |
| ManageableState | <p><b>Type</b><br/>ManageableState enumerated list</p> <p><b>Properties</b><br/>Filter, Group, Nillable, Restricted picklist, Sort</p> <p><b>Description</b><br/>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> </ul> |

| Field     | Details  |
|-----------|--|
|           | <ul style="list-style-type: none"> <li>released</li> <li>unmanaged</li> </ul>  |
| UsageType | <p><b>Type</b><br/>picklist</p> <p><b>Properties</b><br/>Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update</p> <p><b>Description</b><br/>The usage type to which this setting belongs.<br/>Possible values are:</p> <ul style="list-style-type: none"> <li>DocumentSetting</li> <li>ObligationSetting</li> <li>Reconciliation</li> <li>Redlining</li> <li>SignatureSetting</li> </ul> <p>The default value is DocumentSetting.</p> |

## Salesforce Contracts Standard Invocable Actions

Use standard invocable actions to search contract documents and versions.

### [Search Contract Document Action](#)

Search the latest contract document version based on the user's query.

## Search Contract Document Action

Search the latest contract document version based on the user's query.

This action is available in API version 64.0 and later.

## Special Access Rules

To use this action, Contracts AI User permission set is required.

## Supported REST HTTP Methods

### URI

`/services/data/v66.0/actions/standard/searchContractDocument`

### Formats

JSON, XML

**HTTP Methods**

POST

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

| <b>Input</b> | <b>Details</b>  |
|--------------|---|
| contractId   | <b>Type</b><br>string<br><b>Description</b><br>Required.<br>ID of the contract record to use for the search.  |
| searchQuery  | <b>Type</b><br>string<br><b>Description</b><br>Required.<br>Text-based query to use to search contract documents.   |
| resultLimit  | <b>Type</b><br>string<br><b>Description</b><br>Required.<br>Maximum number of text segments that can be returned from the contract search. Each segment represents a relevant portion of a contract document. |

**Outputs**

| <b>Output</b> | <b>Details</b>   |
|---------------|--|
| searchResult  | <b>Type</b><br>string<br><b>Description</b><br>Concatenated content of the top segments that match a user query. |

## Example

### POST

This sample request is for the Search Contract Document action.

```
{
  "inputs": [
    {
      "contractId": "800VW000006142vYAA",
      "searchQuery": "Show me the contract for paper packaging deliveries.",
      "resultLimit": "1000"
    }
  ]
}
```

This sample response is for the Search Contract Document action.

```
{
  "actionName": "searchContractDocument",
  "errors": null,
  "invocationId": null,
  "isSuccess": true,
  "outcome": null,
  "outputValues": {
    "searchResult": "AGREEMENT FOR DELIVERY OF PAPER PACKAGING MATERIALS\n\nThis Agreement...."
  },
  "sortOrder": -1,
  "version": 1
}
```