
Nonprofit Cloud Developer Guide

Version 66.0, Spring '26



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CHAPTER 1 Introduction to Nonprofit Cloud

Use Nonprofit Cloud to fund, deliver, and measure impact with one integrated platform. Nurture your most important relationships, and break down silos between teams with a single source of truth about your donors, stakeholders, and constituents.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions.

CHAPTER 2 Nonprofit Cloud Data Model

In this chapter ...

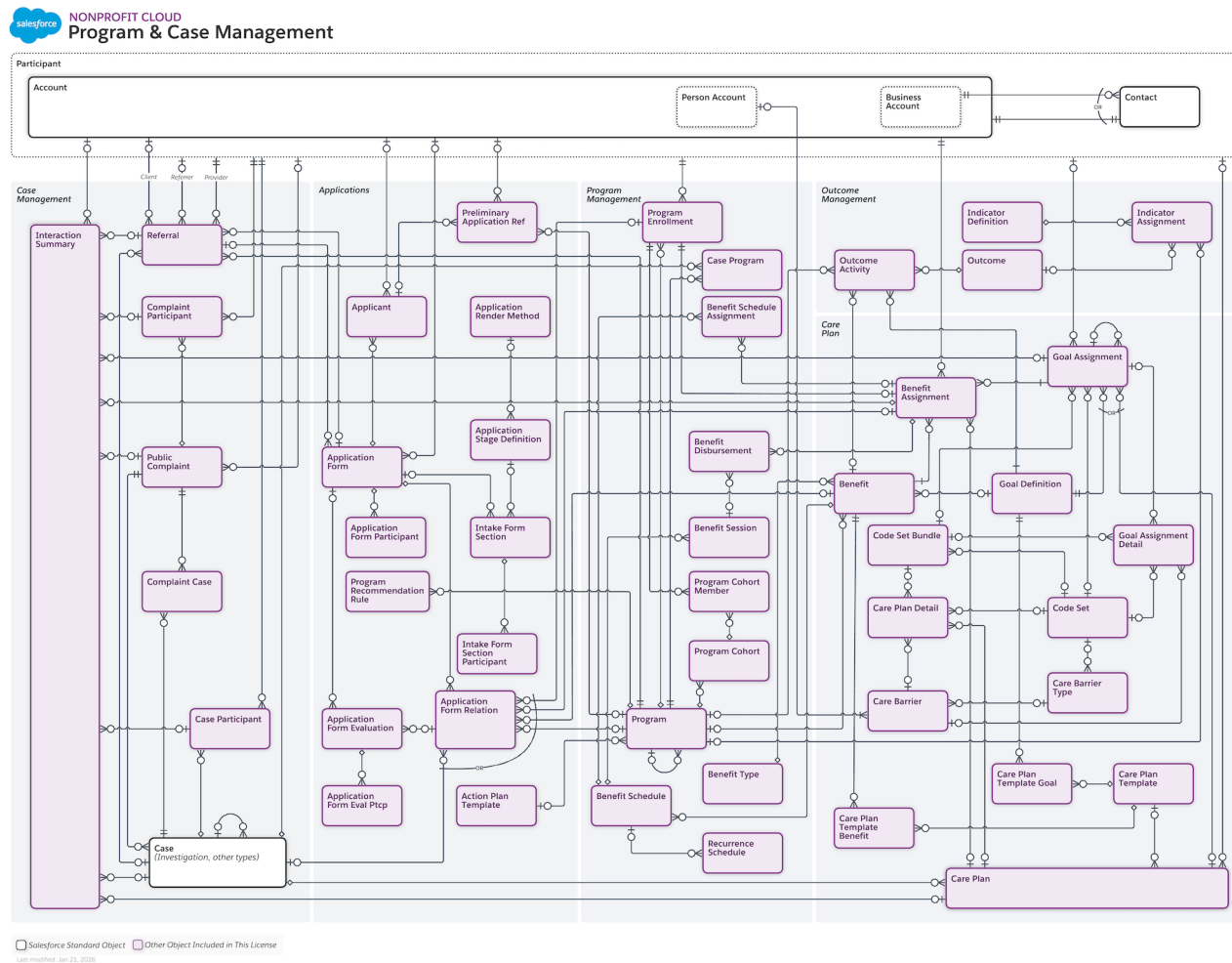
- Case Management Data Model
- Fundraising Data Model
- Grantmaking and Budget Management Data Model
- Group Membership and Households Data Model
- Outcome Management Data Model
- Program Management Data Model
- Provider Management Data Model
- Volunteer Management Data Model

Learn about the objects and relationships within Nonprofit Cloud

Case Management Data Model

Learn about the objects and relationships within the Case Management data model.

The Case Management data model provides a set of objects and fields that you can use to store and manage information about cases and care plans.

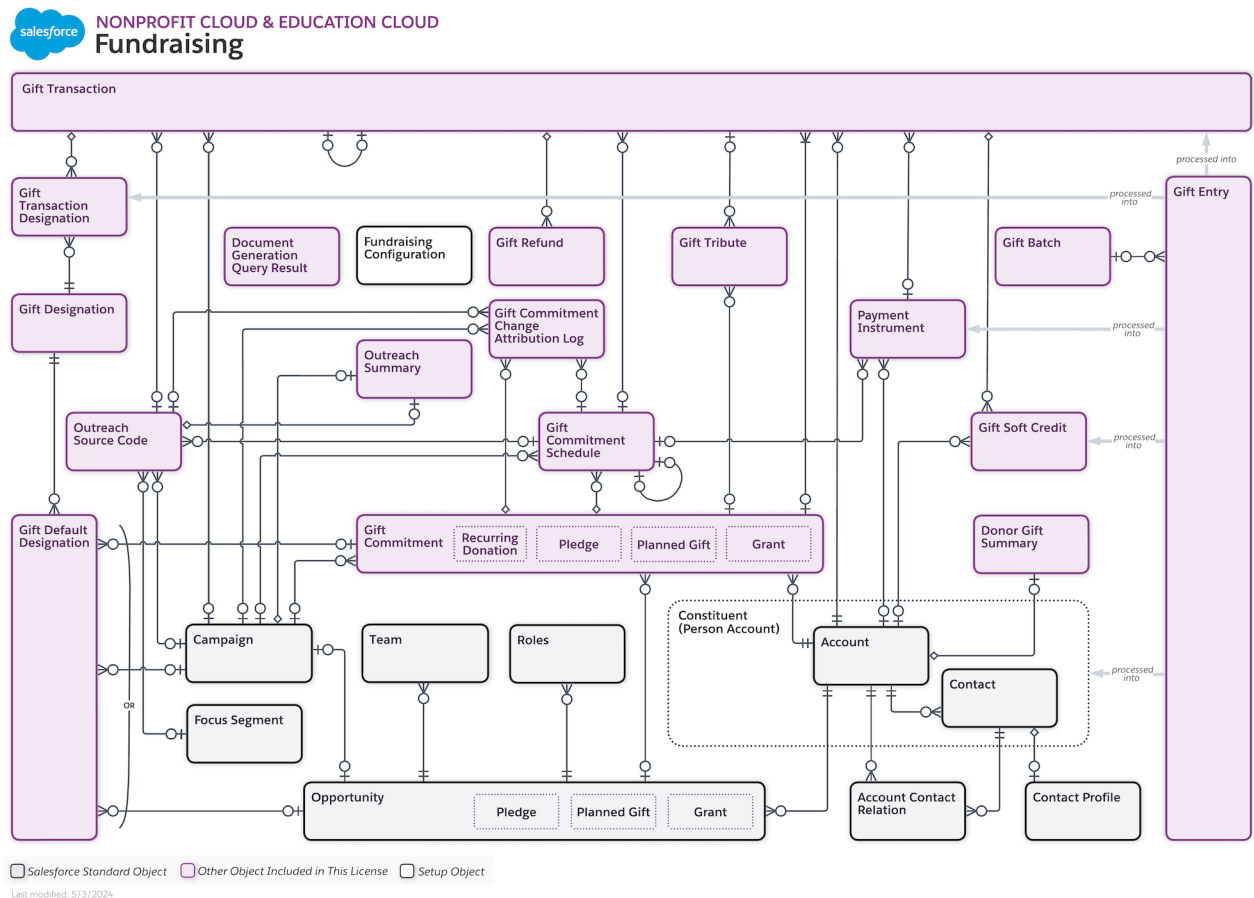


To view a larger version, right-click or Ctrl-click the image and select **Open Image in New Tab**.

Fundraising Data Model

Learn about the objects and relationships within the Fundraising data model.

The Fundraising data model provides a set of objects and fields that you can use to store and manage information about constituents, campaigns, and donations.



To view a larger version, right-click or Ctrl+click the image and select **Open Image in New Tab**.

Grantmaking and Budget Management Data Model

Learn about the objects and relationships within the Grantmaking and Budget Management data model.

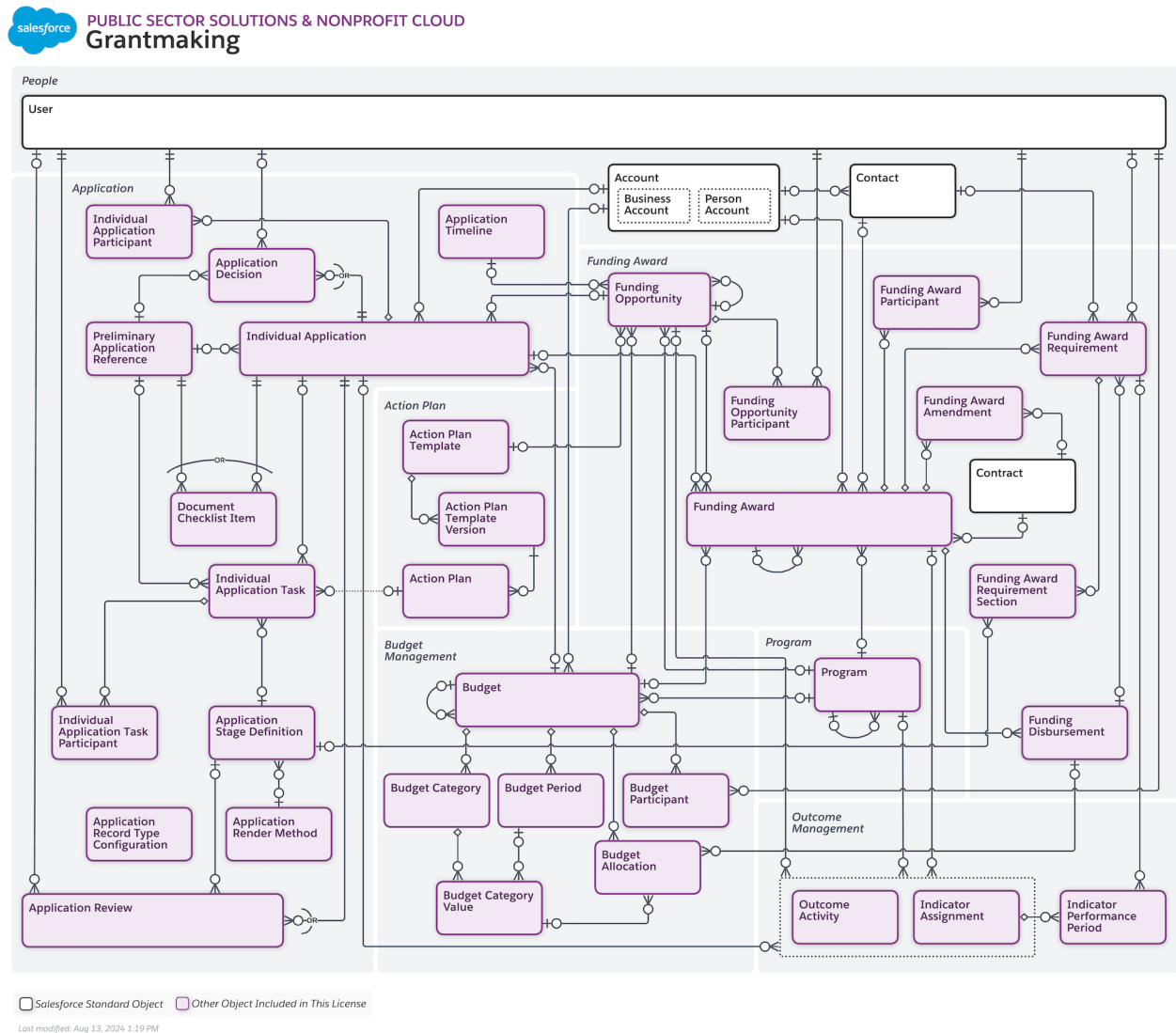
The Grantmaking and Budget Management data model provides a set of objects and fields that you can use to store and manage information about grants you award and the budgets associated with them.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions in Nonprofit Cloud for Grantmaking

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions in Public Sector Solutions



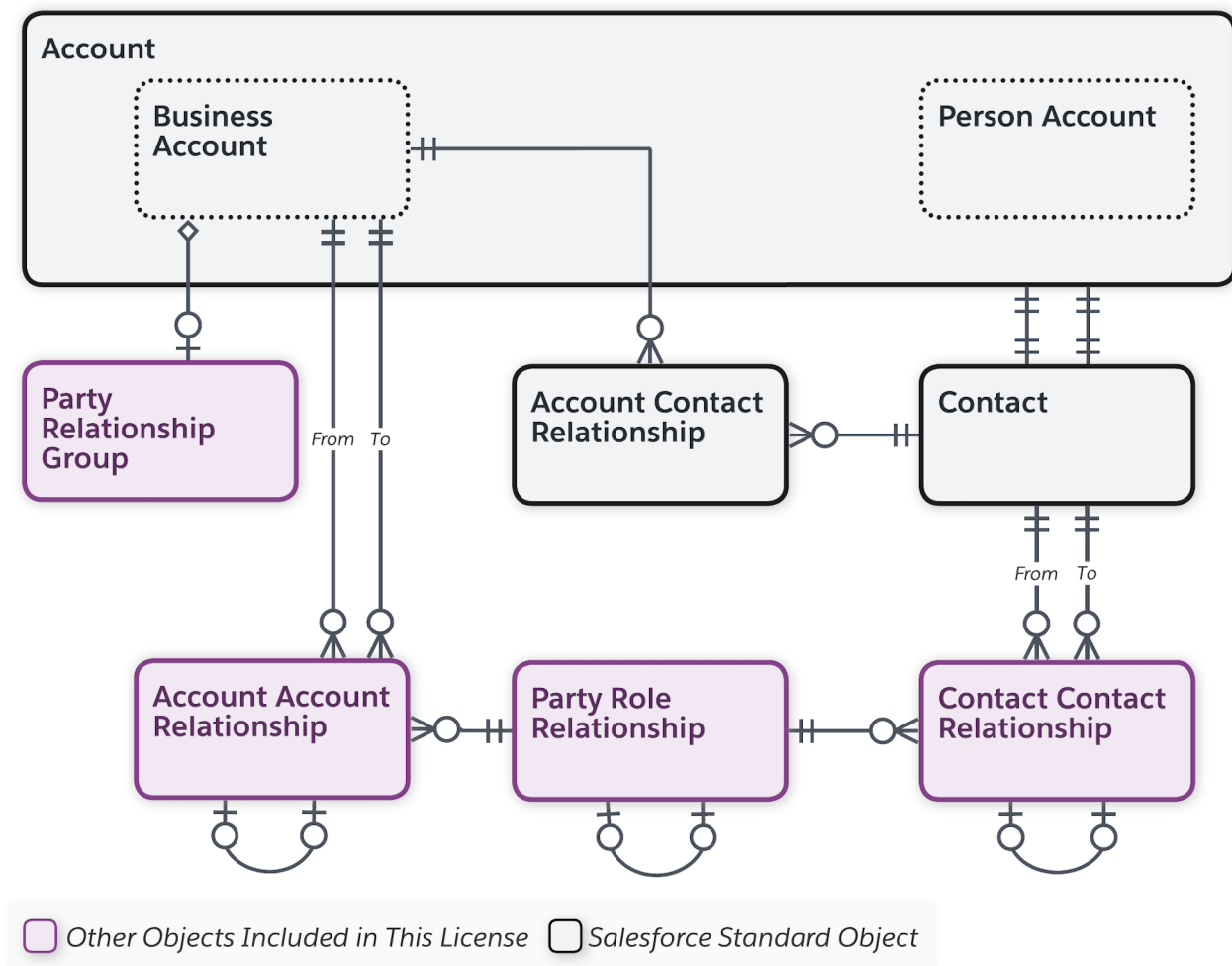
For more details and a larger image, visit the [Data Model Gallery](#).

Group Membership and Households Data Model

Learn about the objects and relationships used for group memberships, also known as party relationship groups.

EDITIONS

Available in: Lightning Experience. [View product and edition availability.](#)



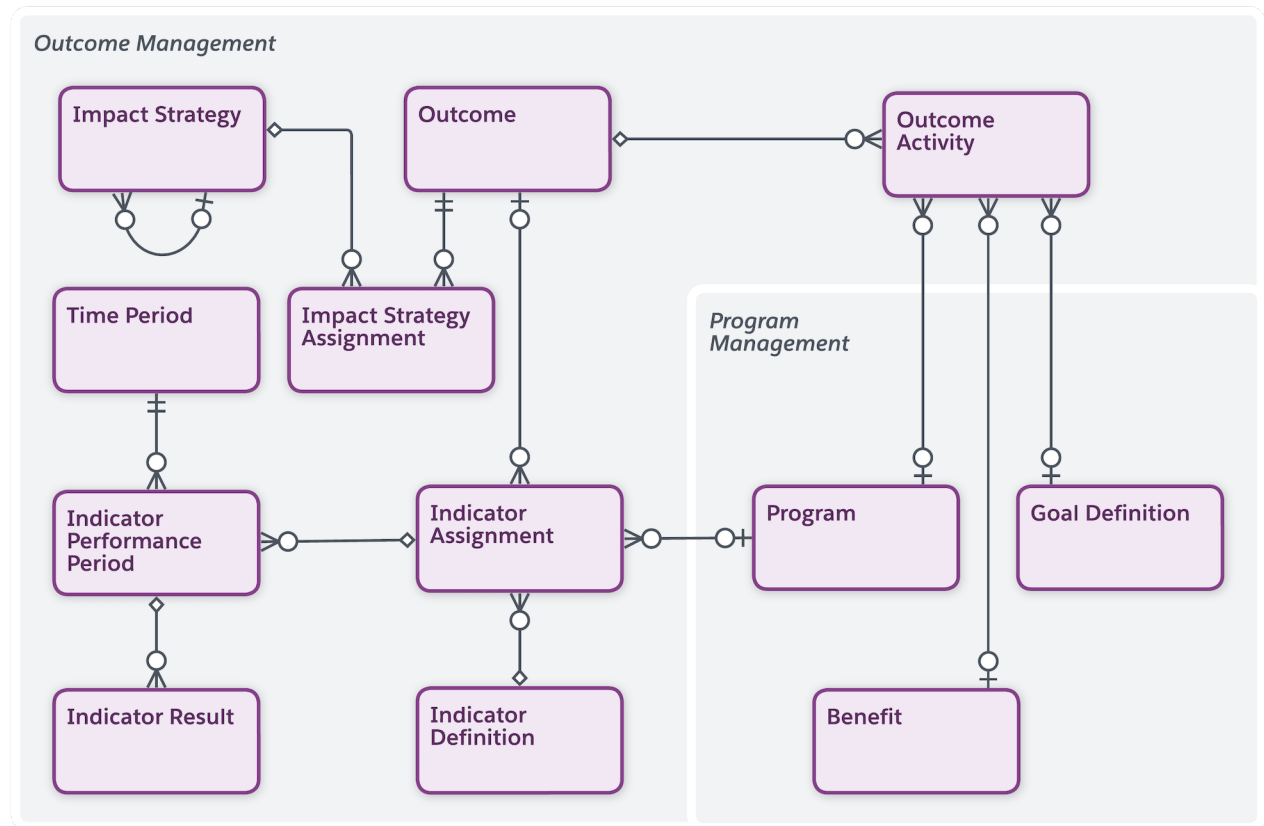
To view a larger version, right-click or Ctrl+click the image and select **Open Image in New Tab**.

Outcome Management Data Model

Learn about the objects and relationships in the Outcome Management data model.

EDITIONS

Available in: Lightning Experience. [View product and edition availability.](#)

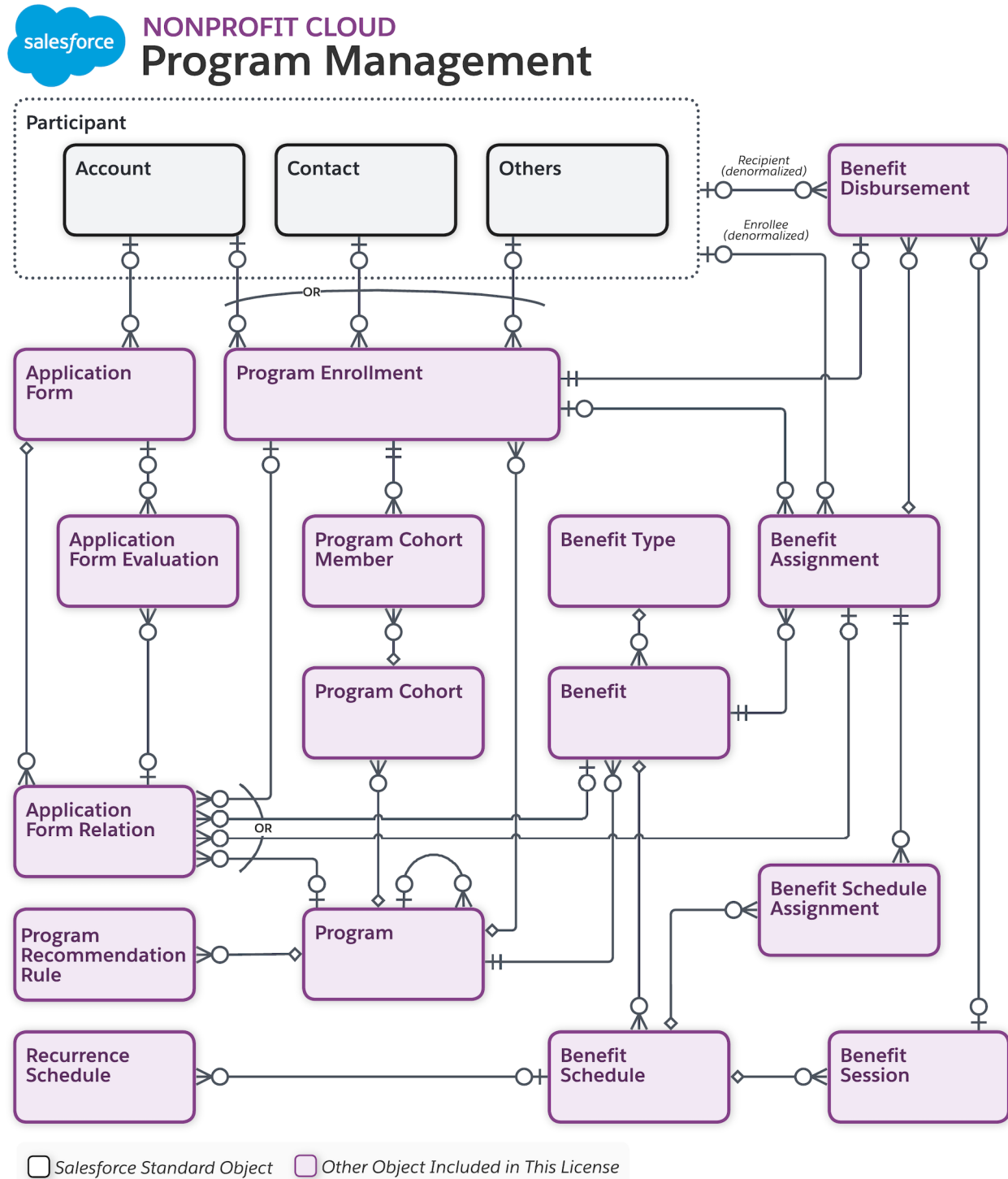


To view a larger version, right-click or Ctrl+click the image and select **Open Image in New Tab**.

Program Management Data Model

Learn about the objects and relationships within the Program Management data model.

The Program Management data model provides a set of objects and fields that you can use to store and manage information about programs and benefits.



Last modified: Jan 23, 2026

To view a larger version, right-click or Ctrl+click the image and select **Open Image in New Tab**.

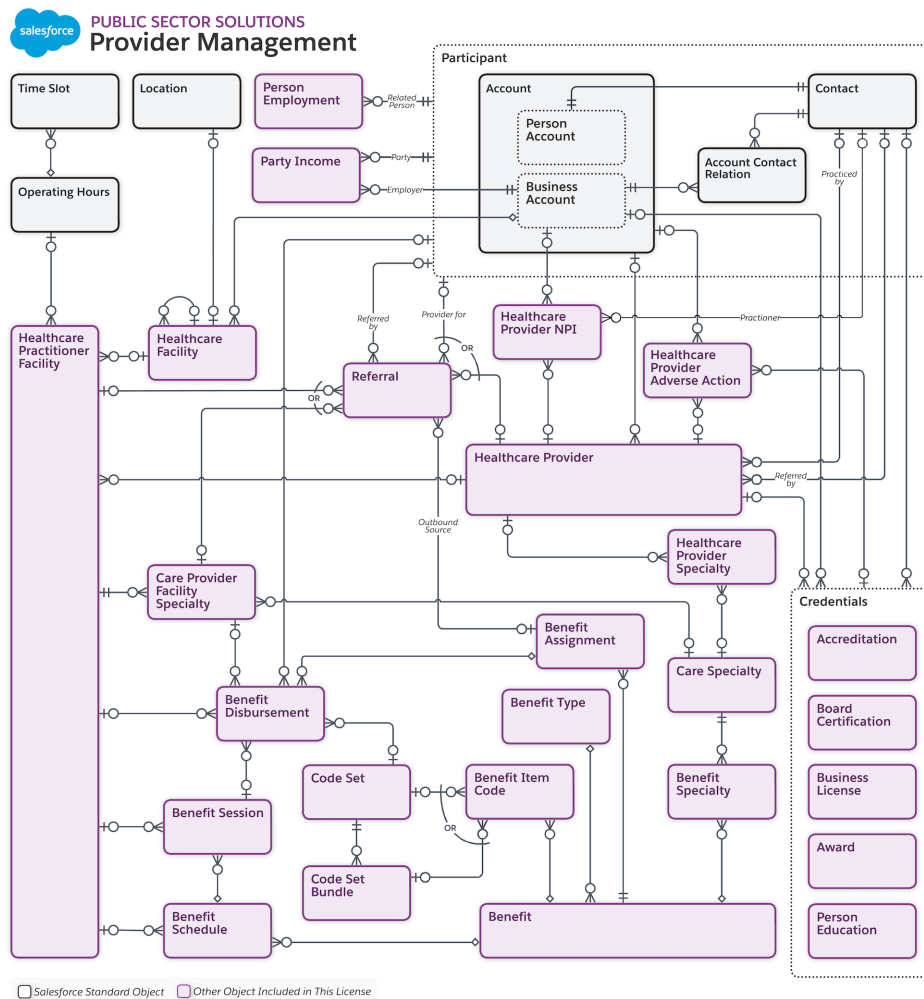
Provider Management Data Model

Learn about the objects and relationships used for provider management in Public Sector Solutions.

EDITIONS

Available in: Lightning Experience

Available in:
Enterprise, Performance, Unlimited,
 and **Developer** Editions with Public
 Sector Solutions



For more details and a larger image, visit the [Data Model Gallery](#).

Volunteer Management Data Model

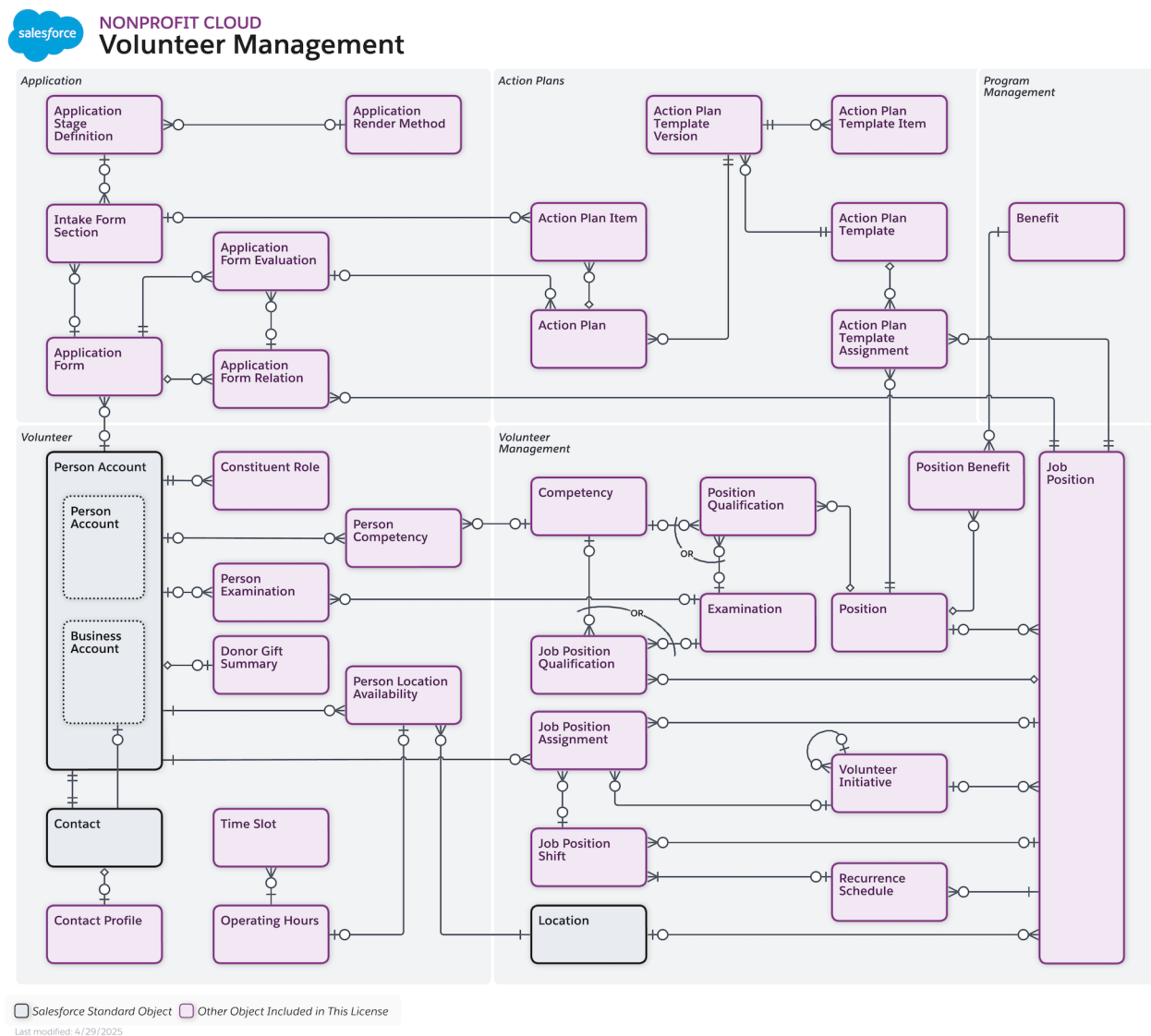
Learn about the objects and relationships within the Volunteer Management data model.

The Volunteer Management data model provides a set of objects and fields that you can use to manage volunteer initiatives, track volunteer hours, and report on volunteer metrics.

EDITIONS

Available in: Lightning Experience

Available in: **Unlimited** and **Developer** Editions.



For more details and a larger image, visit the [Data Model Gallery](#).

CHAPTER 3 Fundraising

In this chapter ...

- Fundraising Standard Objects
- Fundraising Fields on Other Objects
- Fundraising Business APIs
- Fundraising Invocable Actions
- Fundraising Metadata API Types
- Fundraising Tooling API Objects

This guide provides information about the objects and APIs that Fundraising uses.

EDITIONS

Available in: Lightning Experience

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

Fundraising Standard Objects

Fundraising data model provides objects and fields to manage gifts and donors for your nonprofit or education organization.

EDITIONS

Available in: Lightning Experience

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

[DocGenerationQueryResult](#)

Represents information, including a report, template, and process lookup, for a document generation job. This object is available in API version 61.0 and later.

[DonorGiftConcept](#)

The initial idea or proposal for a gift, including the donor's intent and preliminary purpose. This object is available in API version 64.0 and later.

[DonorGiftConceptOpportunity](#)

The junction between a Donor Gift Concept and an Opportunity. This object is available in API version 66.0 and later.

[DonorGiftSummary](#)

Represents gift summaries for accounts and contacts. This object is available in API version 59.0 and later.

[GiftActuarialEntry](#)

Represents the foundational data for calculating the future value of a planned gift, including life expectancy and discount rates. This object is available in API version 65.0 and later.

[GiftStewardship](#)

Represents stewardship of a gift by a contact or an organization that isn't a donor. This object is available in API version 65.0 and later.

[GiftStewardshipActivity](#)

Represents an activity carried out as part of gift stewardship. This object is available in API version 65.0 and later.

[GiftAgreement](#)

The agreement to accept a gift. This object is available in API version 64.0 and later.

[GiftBatch](#)

Represents the details and status of the batch of gifts. This object is available in API version 59.0 and later.

[GiftCommitment](#)

Represents the commitment made by a donor. This object is available in API version 59.0 and later.

[GiftCmtChangeAttrLog](#)

Represents the history of changes to a Gift Commitment over time with attribution to the source campaign or source code attributed to that change. This object is available in API version 60.0 and later.

[GiftCommitmentSchedule](#)

Represents the schedule for fulfilling the commitment. This object is available in API version 59.0 and later.

[GiftDefaultDesignation](#)

Represents the default designation for gifts that originate from an opportunity, campaign, or commitment. This object is available in API version 59.0 and later.

[GiftDefaultSoftCredit](#)

Represents the default allocation for soft credits on gift commitment transactions that are created by a recurrence engine and credited to constituents who influenced the commitment. This object is available in API version 62.0 and later.

[GiftDesignation](#)

Represents a designation that can be assigned to a gift transaction. This object is available in API version 59.0 and later.

[GiftEntry](#)

Represents gifts created individually or in a batch before they're processed and logged in their target records. After processing, these records serve as an audit trail for gift transactions. This object is available in API version 59.0 and later.

[GiftRefund](#)

Represents a refund of a gift. This object is available in API version 59.0 and later.

[GiftSoftCredit](#)

Represents the soft credit attributed to a person or organization for the gift transaction. This object is available in API version 59.0 and later.

[GiftTransaction](#)

Represents a completed transaction from a gift. This object is available in API version 59.0 and later.

[GiftTransactionDesignation](#)

Represents a junction between a gift transaction and a gift designation. This object is available in API version 59.0 and later.

[GiftTribute](#)

Represents the details and status of the gift tribute. This object is available in API version 59.0 and later.

[GiftValueForecast](#)

The past, current, and projected monetary value of a gift. This object is available in API version 64.0 and later.

[OutreachSourceCode](#)

Represents information about a source code that's associated with an outreach campaign. This object is available in API version 59.0 and later.

[OutreachSummary](#)

Represents a summary of results of the outreach campaign. This object is available in API version 59.0 and later.

[PartyCategory](#)

The criteria for categorizing contacts and accounts based on specific classification information for a specified time period. This object is available in API version 64.0 and later.

[PartyPhilanthropicAssessment](#)

Represents a formalized assessment of wealth when a rating takes place, such as a third-party wealth assessment, a property valuation, a financial asset assessment, or an internal assessment. This object is available in API version 63.0 and later.

[PartyPhilanthropicIndicator](#)

Represents an unconfirmed or soft indication that highlights a person's wealth or growth potential. This object is available in API version 63.0 and later.

[PartyPhilanthropicMilestone](#)

Represents philanthropic activities and financial status for a period of time. This object is available in API version 63.0 and later.

[PartyPhilanthropicOccurrence](#)

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

[PartyPhilanthropicRsrchPrfl](#)

Captures information associated with a contact or an organization in a many-to-one relationship. Serves as a pivot point for research on the person or organization. This object is available in API version 64.0 and later.

[PaymentInstrument](#)

Represents the details related to the Payment Instrument used to complete the transaction. This object is available in API version 60.0 and later.

[PlannedGift](#)

A complex gift such as an annuity, bequest, or trust. This object is available in API version 64.0 and later.

[PlannedGiftAnnuityRate](#)

The rate used to calculate payments for a charitable gift annuity. This object is available in API version 64.0 and later.

[PlannedGiftPerformance](#)

The performance of a planned gift over time, including returns, expenses, and net value. This object is available in API version 64.0 and later.

DocGenerationQueryResult

Represents information, including a report, template, and process lookup, for a document generation job. This object is available in API version 61.0 and later.

Supported Calls

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

Special Access Rules

This object is available only if the FundraisingAccess license is enabled and the DocGen User permission set and the Fundraising User system permission are assigned to users.

Fields

Field	Details
<code>DocumentGenerationProcessId</code>	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The process associated with the document creation. This field is a relationship field. Relationship Name DocumentGenerationProcess Relationship Type Lookup Refers To DocumentGenerationProcess
<code>DocumentTemplateId</code>	Type reference Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The template associated with the document creation. This field is a relationship field. Relationship Name DocumentTemplate Relationship Type Lookup Refers To DocumentTemplate
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the batch query job.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description ID of the owner of this object. This field is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
ReportFolderId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The report folder associated with the document generation query result. This is a relationship field and is available from API version 62.0 and later. Relationship Name ReportFolder

Field	Details
	Refers To Folder
RunDateTime	Type dateTime Properties Create, Defaulted on create, Filter, Sort, Update Description The date and time when the query and job was run.

Associated Objects

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

[DocGenerationQueryResultChangeEvent](#)

Change events are available for the object.

[DocGenerationQueryResultFeed](#)

Feed tracking is available for the object.

[DocGenerationQueryResultHistory](#)

History is available for tracked fields of the object.

[DocGenerationQueryResultOwnerSharingRule](#)

Sharing rules are available for the object.

[DocGenerationQueryResultShare](#)

Sharing is available for the object.

DonorGiftConcept

The initial idea or proposal for a gift, including the donor's intent and preliminary purpose. This object is available in API version 64.0 and later.

Supported Calls

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

Special Access Rules

This object is available only if the Fundraising Access license is enabled and the Fundraising User system permission is assigned to users.

Fields

Field	Details
CaseId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The case associated with the gift concept record. This field is a relationship field. Relationship Name Case Refers To Case
ConceptPriority	Type double Properties Create, Filter, Nillable, Sort, Update Description The level of a proposed gift's importance to the donor or institution relative to other proposed gifts.
ContactId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description A contact for the gift concept. This field is a relationship field. Relationship Name Contact Refers To Contact
Description	Type textarea Properties Create, Nillable, Update Description A description of the gift concept.

Field	Details
DonorCommitmentLikelihood	Type percent Properties Create, Filter, Nillable, Sort, Update Description An estimate of the likelihood the donor commits to the gift concept.
DonorId	Type reference Properties Create, Filter, Group, Sort, Update Description The donor associated with the gift concept. This field is a relationship field. Relationship Name Donor Refers To Account
DonorPriorityRank	Type double Properties Create, Filter, Nillable, Sort, Update Description The donor's rank of a gift concept among other potential gifts the donor is considering.
EstimatedGiftValue	Type currency Properties Create, Filter, Nillable, Sort, Update Description An estimate of a proposed gift's potential value, based on preliminary discussions with the donor.
ExpectedEndDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description

Field	Details
ExpectedStartDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The expected end date for formalizing the gift concept.
GiftAgreementId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description A gift agreement record associated with the gift concept, used to track its progression from concept to commitment. This field is a relationship field. Relationship Name GiftAgreement Refers To GiftAgreement
InstitutionPriorityRank	Type double Properties Create, Filter, Nillable, Sort, Update Description Your institution's rank of a gift concept's importance to its fundraising strategy.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description
Name	Type string

Field	Details
	Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description The ID of the gift concept record.
OpportunityId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description Opportunity records associated with the gift concept, used to track its progression from concept to commitment. This field is a relationship field. Relationship Name Opportunity Refers To Opportunity
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description This field is a polymorphic relationship field. Relationship Name Owner Refers To Group, User
SequenceNumber	Type double Properties Create, Filter, Nillable, Sort, Update Description A gift concept's position in a sequence of proposals for the donor.
Status	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The status of the gift concept. Possible values are: • Concept Approved • In Discussion • In Review • Pending Approval • Planning
Title	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The title of the gift concept.
Type	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The type of the gift concept. Possible values are: • Capital Campaign Concept • In Development • Major Gift Concept • Other Gift Concept • Planned Gift Concept • Program and Support Gift Concept • Specialized Gift Concept

Associated Objects

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

DonorGiftConceptChangeEvent

Change events are available for the object.

DonorGiftConceptFeed

Feed tracking is available for the object.

DonorGiftConceptHistory

History is available for tracked fields of the object.

DonorGiftConceptOwnerSharingRule

Sharing rules are available for the object.

DonorGiftConceptShare

Sharing is available for the object.

DonorGiftConceptOpportunity

The junction between a Donor Gift Concept and an Opportunity. This object is available in API version 66.0 and later.

Supported Calls

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

Fields

Field	Details
DonorGiftConceptId	Type reference Properties Create, Filter, Group, Sort, Update Description The donor gift concept associated with this donor gift concept opportunity. This field is a relationship field. Relationship Name DonorGiftConcept Relationship Type Master-detail Refers To DonorGiftConcept (the master object)
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	Type dateTime

Field	Details
	Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description The name of the donor gift concept opportunity.
OpportunityAmount	Type currency Properties Filter, Nillable, Sort Description The estimated total gift amount of the associated opportunity. Read-only field that is derived from the opportunity amount.
OpportunityCloseDate	Type date Properties Filter, Group, Nillable, Sort Description The date when the associated opportunity is expected to close. Read-only field that is derived from the opportunity close date.
OpportunityId	Type reference Properties Create, Filter, Group, Sort, Update Description The opportunity associated with the donor gift concept. This field is a relationship field and unique within your organization. Relationship Name Opportunity Refers To Opportunity

Field	Details
OpportunityStageName	Type picklist Properties Filter, Group, Nillable, Sort Description The stage of the associated opportunity. Read-only field that is derived from the opportunity stage name. Possible values are: • Closed Lost • Closed Won • Id. Decision Makers • Needs Analysis • Negotiation/Review • Perception Analysis • Proposal/Price Quote • Prospecting • Qualification • Value Proposition

Associated Objects

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

[DonorGiftConceptOpportunityChangeEvent](#) on page 737

Change events are available for the object.

[DonorGiftConceptOpportunityFeed](#) on page 739

Feed tracking is available for the object.

[DonorGiftConceptOpportunityHistory](#) on page 736

History is available for tracked fields of the object.

DonorGiftSummary

Represents gift summaries for accounts and contacts. This object is available in API version 59.0 and later.



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

Supported Calls

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

Special Access Rules

This object is available only if the Fundraising Access license is enabled and the Fundraising User system permission is assigned to users.

Fields

Field	Details
AverageGiftAmount	Type currency Properties Filter, Sort Description The average value of the gifts the donor directly contributed. This value of this field is calculated using a formula: $(TotalGiftTransactionAmount / GiftCount)$.
BestGiftYear	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The year in which the donor gave the largest value of gifts. Data Processing Engine finds the year in which the donor gave the largest sum of paid gift transaction amounts. You can schedule this calculation to run on a regular basis.
BookedPledges	Type currency Properties Create, Filter, Nillable, Sort, Update Description The total value of a donor's pledges that are fully accounted for. Data Processing Engine calculates this value by adding the amounts of the donor's pledges with <code>FormalCommitmentType = Written</code>. You can schedule this calculation to run on a regular basis. Available in API version 62.0 and later.
CompositeRfmScore	Type int Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The score that represents the composite threshold of gift recency, gift frequency, and gift monetary value. Data Processing Engine calculates this value according to how you configure RFM Scoring. You can schedule this calculation to run on a regular basis. Available in API version 61.0 and later.
CurrentRecurringStartDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date of the donor's first recurring gift transaction for their active recurring gift. Data Processing Engine finds the date of the donor's first paid transaction associated with a related recurring gift commitment that isn't closed. You can schedule this calculation to run on a regular basis.
CurrentYearGiftCount	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The number of gifts that the donor directly contributed this year. Data Processing Engine calculates this value by counting the paid gift transactions this calendar year. You can schedule this calculation to run on a regular basis.
CurrentYearSoftCreditCount	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The total number of gift soft credit records attributed to the donor this year. Available in API version 63.0 and later.
CurrentYearSoftCreditsAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The total value of gift soft credits earned by the donor this year. Available in API version 63.0 and later.

Field	Details
DaysSinceLastGift	Type int Properties Filter, Group, Nillable, Sort Description The number of days since the donor gave a direct contribution. This value of this field is calculated using a formula: IF (ISBLANK (TEXT (LastGiftDate)) , NULL, TODAY () - LastGiftDate).
DonorId	Type reference Properties Create, Filter, Group, Sort Description The person, household, or organization account associated with the donor gift summary. This field is a relationship field. Relationship Name Donor Relationship Type Master-Detail Refers To Account
FirstGiftAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The value of the first gift the donor directly contributed. Data Processing Engine calculates this value by finding the amount of the donor's first paid gift transaction. You can schedule this calculation to run on a regular basis.
FirstGiftCampaignId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The first campaign to which the donor contributed. Data Processing Engine calculates this value by finding the campaign of the donor's first paid gift transaction related to a campaign. You can schedule this calculation to run on a regular basis.

Field	Details
	This field is a relationship field. Relationship Name FirstGiftCampaign Relationship Type Lookup Refers To Campaign
FirstGiftDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date of the donor's first direct contribution. Data Processing Engine calculates this value by finding the date of the donor's first paid gift transaction. You can schedule this calculation to run on a regular basis.
FirstRecurringStartDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date of the donor's first recurring gift transaction. Data Processing Engine calculates this value by finding the date of the donor's first paid gift transaction related to a recurring gift commitment. You can schedule this calculation to run on a regular basis.
FirstSoftCreditAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The value of the first gift the donor influenced but didn't directly contribute. Data Processing Engine calculates this value by finding the soft credit amount of the first paid gift transaction for which the donor receives soft credit. You can schedule this calculation to run on a regular basis.
FirstSoftCreditDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The date of the first gift the donor influenced but didn't directly contribute. Data Processing Engine calculates this value by finding the date of the first paid gift transaction for which the donor receives soft credit. You can schedule this calculation to run on a regular basis.
FirstVolunJobPstnAsgntDt	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date of the contact's first volunteer shift. Data Processing Engine finds the first job position assignment that's related to a volunteer initiative and calculates the value. You can schedule this calculation to run regularly.
FrequencyScore	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The score that represents the giving frequency of the donor. Data Processing Engine calculates this value according to how you configure RFM Scoring. You can schedule this calculation to run on a regular basis. Available in API version 61.0 and later.
GiftCount	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The total number of gifts the donor directly contributed. Data Processing Engine calculates this value by counting all of the donor's paid gift transactions. You can schedule this calculation to run on a regular basis.
GiftsLastYearAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The total value of gifts that the donor directly contributed last year. Data Processing Engine calculates this value by adding the amounts of paid gift transactions from the last calendar year. You can schedule this calculation to run on a regular basis.

Field	Details
GiftsThisYearAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The total value of gifts that the donor directly contributed this year. Data Processing Engine calculates this value by adding the amounts of the donor's paid gift transactions from this calendar year. You can schedule this calculation to run on a regular basis.
GiftsTwoYearsAgoAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The value of gifts the donor directly contributed two years ago. Data Processing Engine calculates this value by adding the amounts of the donor's paid gift transactions from two calendar years ago. You can schedule this calculation to run on a regular basis.
GivingLevel	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The range within which the donor's total contributions fall for the current year. Possible values are: • \$25,000,000+ • \$10,000,000–\$24,999,999 • \$5,000,000–\$9,999,999 • \$1,000,000–\$4,999,999 • \$250,000–\$999,999 • \$100,000–\$249,999 • \$50,000–\$99,999 • \$25,000–\$49,999 • \$10,000–\$24,999 • \$5,000–\$9,999 • \$2,500–\$4,999 • \$1,000–\$2,499 • \$500–\$999 • \$100–\$499 • Under \$100

Field	Details
HighestGiftAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The largest single gift that the donor directly contributed. Data Processing Engine calculates this value by finding the amount of the donor's largest paid gift transaction. You can schedule this calculation to run on a regular basis.
HighestGiftYearAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The amount the donor gave in the year they directly contributed the largest value. Data Processing Engine calculates this value by finding the total amount of all paid gift transactions in the year when the donor gave the largest amount. You can schedule this calculation to run on a regular basis.
HighestSoftCreditAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The value of the largest single gift the donor influenced but didn't directly contribute. Data Processing Engine calculates this value by finding the largest gift transaction for which the donor receives soft credit. You can schedule this calculation to run on a regular basis.
HighestSoftCreditDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date of the largest single gift the donor influenced but didn't directly contribute. Data Processing Engine calculates this value by finding the date of the largest gift transaction for which the donor receives soft credit. You can schedule this calculation to run on a regular basis.
LastGiftAmount	Type currency Properties Create, Filter, Nillable, Sort, Update

Field	Details
	Description The value of the donor's most recent directly contributed gift. Data Processing Engine calculates this value by finding the amount of the donor's most recent paid gift transaction. You can schedule this calculation to run on a regular basis.
LastGiftDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date of the donor's most recent directly contributed gift. Data Processing Engine calculates this value by finding the date of the donor's most recent paid gift transaction. You can schedule this calculation to run on a regular basis.
LastRecurringPaymentDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date when the donor last made a payment toward a recurring gift. Data Processing Engine calculates this value by finding the date of the donor's most recent paid gift transaction related to a recurring gift commitment. You can schedule this calculation to run on a regular basis.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastSoftCreditAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The value of the most recent gift the donor influenced but didn't directly contribute. Data Processing Engine calculates this value by finding the amount of the most recent paid gift transaction for which the donor received soft credit. You can schedule this calculation to run on a regular basis.

Field	Details
LastSoftCreditDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date of the most recent gift the donor influenced but didn't directly contribute. Data Processing Engine calculates this value by finding the date of the most recent paid gift transaction for which the donor received soft credit. You can schedule this calculation to run on a regular basis.
LastTwoYearGiftCount	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The total number of gifts the donor directly contributed two calendar years ago. Data Processing Engine calculates this value by counting the donor's paid gift transactions with a transaction date from two calendar years ago. You can schedule this calculation to run on a regular basis.
LastTwoYearSoftCreditCount	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The total number of gift soft credit records attributed to the donor two years ago. Available in API version 63.0 and later.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate is not null, the user accessed this record or list view.
LastVolunJobPstnAsgmtDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The date of the contact's last volunteer shift. Data Processing Engine calculates this value by finding the most recent job position assignment that is related to a volunteer initiative. You can schedule this calculation to run on a regular basis.
LastYearGiftCount	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The total number of gifts that the donor directly contributed last calendar year. Data Processing Engine calculates this value by counting the number of the donor's paid gift transactions with a transaction date in the last calendar year. You can schedule this calculation to run on a regular basis.
LastYearSoftCreditCount	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The total number of gift soft credits attributed to the donor last year. Available in API version 63.0 and later.
LastYearSoftCreditsAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The total value of soft credits earned by the donor last year. Available in API version 63.0 and later.
LowestGiftAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The smallest single gift the donor directly contributed. Data Processing Engine calculates this value by finding the amount of the smallest paid gift transaction of all of the donor's paid gift transactions. You can schedule this calculation to run on a regular basis.
MonetaryScore	Type int

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update Description The score that represents the monetary value of the donor's gifts. Data Processing Engine calculates this value according to how you configure RFM Scoring. You can schedule this calculation to run on a regular basis. Available in API version 61.0 and later.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description The auto-numbered name that uniquely identifies the donor gift summary.
RecencyScore	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The score that represents the giving recency of a donor. Data Processing Engine calculates this value according to how you configure RFM Scoring. You can schedule this calculation to run on a regular basis. Available in API version 61.0 and later.
SecondGiftDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date of the second gift the donor directly contributed. Data Processing Engine calculates this value by finding the date of the donor's second paid gift transaction. You can schedule this calculation to run on a regular basis.
SoftCreditCount	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The number of gifts the donor influenced and didn't directly contribute. Data Processing Engine calculates this value by counting paid gift transactions for which the donor receives soft credit. You can schedule this calculation to run on a regular basis.

Field	Details
TotalBookableRevenue	Type currency Properties Create, Filter, Nillable, Sort, Update Description Data Processing Engine calculates this value by subtracting any transactions associated with booked pledges from the value of all transactions and booked pledges. You can schedule this calculation to run on a regular basis. Available in API version 62.0 and later.
TotalGiftsAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The value of all gifts the donor directly contributed. Data Processing Engine calculates this value by adding the amounts of the donor's paid gift transactions. You can schedule this calculation to run on a regular basis.
TotalHardSoftCredits	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The number of gifts the donor directly contributed and influenced. Data Processing Engine calculates this value by counting the donor's paid transactions and paid transactions for which the donor receives soft credit.. You can schedule this calculation to run on a regular basis.
TotalHardSoftCreditsAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The value of all gifts the donor directly contributed and influenced. Data Processing Engine calculates this value by adding the amounts of the donor's paid transactions and paid transactions for which the donor receives soft credit.. You can schedule this calculation to run on a regular basis.
TotalPaidRcrInstallments	Type int

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update Description The number of recurring installments that the donor directly contributed. Data Processing Engine calculates this value by counting the donor's paid gift transactions associated with recurring gift commitments. You can schedule this calculation to run on a regular basis.
TotalPaidRcrInstlAmt	Type currency Properties Create, Filter, Nillable, Sort, Update Description The value of all of the recurring installments that the donor directly contributed. Data Processing Engine calculates this value by adding the amounts of the donor's paid gift transactions associated with recurring gift commitments. You can schedule this calculation to run on a regular basis.
TotalVolunJobPstnAsgnCnt	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The number of times a contact has volunteered, which is the number of job position assignments related to volunteer initiatives. The Data Processing Engine adds the assignments and calculates the value. You can schedule this calculation to run regularly.
TotalVolunteerHours	Type double Properties Create, Filter, Nillable, Sort, Update Description The total hours a contact volunteered. The Data Processing Engine adds the hours from job position assignments related to volunteer initiatives and calculates the value. You can schedule this calculation to run regularly.
TotalSoftCreditsAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The total value of all soft credits the donor has earned. Available in API version 63.0 and later.

GiftActuarialEntry

Represents the foundational data for calculating the future value of a planned gift, including life expectancy and discount rates. This object is available in API version 65.0 and later.

Supported Calls

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

Special Access Rules

Fields

Field	Details
ActuarialMethod	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the actuarial method of the actuarial entry. Possible values are: • Commutation Factors • Discounted Rates • Expectancy • Not Applicable • Present Value
AdjustmentFactor	Type double Properties Create, Filter, Nillable, Sort, Update Description The factor used to adjust annuities based on the payment frequency of the actuarial entry.
AgeInYears	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The age in years of the person related to the actuarial entry.

Field	Details
AnnuityFactor	Type double Properties Create, Filter, Nillable, Sort, Update Description The factor used to calculate the annuities of the actuarial entry.
CommutationFactor	Type double Properties Create, Filter, Nillable, Sort, Update Description The commutation factor used to calculate the annuities and current values of the actuarial entry.
DiscountFactor	Type double Properties Create, Filter, Nillable, Sort, Update Description The factor used to calculate the applicable discount for the actuarial entry.
DurationInYears	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The time in years for which the actuarial entry applies.
EndDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date after which the actuarial entry isn't in effect.
Expectancy	Type double Properties Create, Filter, Nillable, Sort, Update

Field	Details
	Description The life expectancy based on the actuarial model of the actuarial entry.
IncomeInterest	Type double Properties Create, Filter, Nillable, Sort, Update Description The interest gained on the income of the person related to the actuarial entry.
InterestRate	Type percent Properties Create, Filter, Nillable, Sort, Update Description The interest rate percentage of the actuarial entry.
IsActive	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the actuarial entry is active (true) or not (false). The default value is <code>false</code> .
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate isn't null, the user accessed this record or list view.

Field	Details
MonthsToAnnualPayout	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The number of months before the annual payout of the actuarial entry.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description The name of the actuarial entry.
OlderAgeInYears	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The older age in years among two individuals.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description ID of the owner of this object. This field is a polymorphic relationship field. Relationship Name Owner Refers To Group, User
PaymentFrequency	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The payment frequency of the actuarial entry.

Field	Details
PayoutRate	Type double Properties Create, Filter, Nillable, Sort, Update Description The payout rate of the actuarial entry.
RemainderFactor	Type double Properties Create, Filter, Nillable, Sort, Update Description The factor used to calculate the remainder of the actuarial entry.
Source	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The source of the actuarial entry.
StartDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date from which the actuarial entry takes effect.
Title	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The title of the actuarial entry.
ValuationFactor	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The name of the valuation factor for the actuarial entry.

Field	Details
Version	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The version of the actuarial entry.
YoungerAgeInYears	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The younger age in years among two individuals.

Associated Objects

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

[GiftActuarialEntryChangeEvent](#) on page 737

Change events are available for the object.

[GiftActuarialEntryFeed](#) on page 739

Feed tracking is available for the object.

[GiftActuarialEntryHistory](#) on page 736

History is available for tracked fields of the object.

[GiftActuarialEntryOwnerSharingRule](#) on page 734

Sharing rules are available for the object.

[GiftActuarialEntryShare](#) on page 733

Sharing is available for the object.

GiftStewardship

Represents stewardship of a gift by a contact or an organization that isn't a donor. This object is available in API version 65.0 and later.

Supported Calls

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

Special Access Rules

Fields

Field	Details
AccountId	Type reference Properties Create, Filter, Group, Sort, Update Description ID of a person, household, or organization involved in the stewardship of the gift. This field is a relationship field. Relationship Name Account Refers To Account
ContactId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description ID of the contact for the stewardship of the gift. This field is a relationship field. Relationship Name Contact Refers To Contact
DonorPreferences	Type multipicklist Properties Create, Filter, Nillable, Update Description The donor's preferences for channels for communicating about the gift. Possible values are: • Annual Giving Summary • Anonymous Recognition • Custom Stewardship Plan • Named Recognition • Newsletter

Field	Details
	- Physical Recognition Item - Quarterly Impact Report
EndDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The end date of stewardship activities for the gift.
GiftAgreementId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description ID of the agreement associated with the stewardship of the gift. This field is a relationship field. Relationship Name GiftAgreement Refers To GiftAgreement
GiftId	Type reference Properties Create, Filter, Group, Sort, Update Description ID of the gift under stewardship. This field is a polymorphic relationship field. Relationship Name Gift Refers To GiftCommitment, GiftTransaction, PlannedGift
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.

Field	Details
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate isn't null, the user accessed this record or list view.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description The ID of the gift stewardship record.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description ID of the owner of this object. ID of the creator of this object. This field is a polymorphic relationship field. Relationship Name Owner Refers To Group, User
StartDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The start date of stewardship activities for the gift.
Title	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The title of the gift stewardship record.

Associated Objects

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

GiftStewardshipChangeEvent on page 737

Change events are available for the object.

GiftStewardshipFeed on page 739

Feed tracking is available for the object.

GiftStewardshipHistory on page 736

History is available for tracked fields of the object.

GiftStewardshipOwnerSharingRule on page 734

Sharing rules are available for the object.

GiftStewardshipShare on page 733

Sharing is available for the object.

GiftStewardshipActivity

Represents an activity carried out as part of gift stewardship. This object is available in API version 65.0 and later.

Supported Calls

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

Fields

Field	Details
ActivityDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date of the stewardship activity.
ActivityDescription	Type textarea Properties Create, Filter, Nillable, Sort, Update Description A description of the stewardship activity.
ActivityType	Type picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update Description The type of stewardship activity.
AssignedToId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description ID of the team member responsible for the stewardship activity. This field is a relationship field. Relationship Name AssignedTo Refers To User
GiftStewardshipId	Type reference Properties Create, Filter, Group, Sort, Update Description The ID of the gift stewardship associated with the activity. This field is a relationship field. Relationship Name GiftStewardship Refers To GiftStewardship
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort

Field	Details
	Description The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate isn't null, the user accessed this record or list view.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description The ID of the gift stewardship activity record.
Notes	Type textarea Properties Create, Nillable, Update Description Notes on the stewardship activity and its outcomes.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description ID of the owner of this object. ID of the creator of this object. This field is a polymorphic relationship field. Relationship Name Owner Refers To Group, User
Status	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The status of the stewardship activity.

Associated Objects

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

GiftStewardshipActivityChangeEvent on page 737

Change events are available for the object.

GiftStewardshipActivityFeed on page 739

Feed tracking is available for the object.

GiftStewardshipActivityHistory on page 736

History is available for tracked fields of the object.

GiftStewardshipActivityOwnerSharingRule on page 734

Sharing rules are available for the object.

GiftStewardshipActivityShare on page 733

Sharing is available for the object.

GiftAgreement

The agreement to accept a gift. This object is available in API version 64.0 and later.

Supported Calls

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

Special Access Rules

This object is available only if the Fundraising Access license is enabled and the Fundraising User system permission is assigned to users.

Fields

Field	Details
AccountId	Type reference Properties Create, Filter, Group, Sort, Update Description A person, household, or organization associated with the gift agreement. This field is a relationship field. Relationship Name Account Refers To Account
CaseId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The case associated with the gift agreement. This field is a relationship field. Relationship Name Case Refers To Case
ComplianceStatus	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The status of compliance review for the gift. Possible values are: • Compliant • In Review • Noncompliant • Not Yet Submitted • Requires Modification
ContactId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description A contact for the gift agreement. This field is a relationship field. Relationship Name Contact Refers To Contact
ContractId	Type reference Properties Create, Filter, Group, Sort Description The contract associated with the gift agreement. This field is a relationship field.

Field	Details
	Relationship Name Contract
	Relationship Type Master-detail
	Refers To Contract (the master object)
GiftAgreementTitle	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The title of the gift agreement.
GiftType	Type picklist
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The type of gift. Possible values are: - Capital Campaign - In Development - Major Gift - Other Gift Concept - Planned Gift - Program and Support Gift Concept - Specialized Gift
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description
LastViewedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description

Field	Details
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description The ID of the gift agreement record.
TotalGiftValue	Type currency Properties Create, Filter, Nillable, Sort, Update Description The total monetary value of the gift as stated in the gift agreement.

Associated Objects

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

[GiftAgreementChangeEvent](#)

Change events are available for the object.

[GiftAgreementFeed](#)

Feed tracking is available for the object.

[GiftAgreementHistory](#)

History is available for tracked fields of the object.

[GiftAgreementOwnerSharingRule](#)

Sharing rules are available for the object.

[GiftAgreementShare](#)

Sharing is available for the object.

GiftBatch

Represents the details and status of the batch of gifts. 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 only if the Fundraising Access license is enabled and the Fundraising User system permission is assigned to users.

Fields

Field	Details
DefaultGiftFieldValues	Type textarea Properties Create, Nillable, Update Description The default values used for new Gift Entry Grid rows in a gift batch. This field is available from API version 65.0 and later.
Description	Type textarea Properties Create, Filter, Group, Nillable, Sort, Update Description The description of the gift batch.
DoesTotalGiftValueMatch	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the total and estimated amount of gifts or total and estimated count of gifts in the gift batch match (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.
EstimatedGiftCount	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The expected number of gifts in the gift batch.
ExpectedValueofGiftsinBatch	Type double Properties Create, Filter, Nillable, Sort, Update Description When a single currency is accepted, this field shows the expected total value in the default currency of the gifts in the gift batch. When multiple currencies are accepted, this field is currency agnostic and is used to validate Estimated and Actual Batch values.

Field	Details
FailedGiftCount	Type int Properties Filter, Group, Nillable, Sort Description The number of gifts that failed to process.
LastProcessedDateTime	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The last date and time when the gift batch was processed.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate isn't null, the user accessed this record or list view.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description The autogenerated name of the gift batch.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	Description ID of the owner of this object. ID of the creator of this object. This field is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
ProcessedGiftCount	Type int Properties Filter, Group, Nillable, Sort Description The number of gifts that have been processed.
ScreenTemplateName	Type picklist Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Specifies the name of the screen template that's used for the gift batch. Possible values are: • Default The default value is Default.
Status	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the status of the gift batch. Possible values are: • Failed • In Progress • Partially Processed • Processed • Unprocessed The default value is Unprocessed.

Field	Details
StatusReason	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The reason for a gift batch status.
TotalBatchAmount	Type double Properties Filter, Nillable, Sort Description When a single currency is accepted, this field shows the total value in the default currency of the gifts in the gift batch. When multiple currencies are accepted, this field is currency agnostic and is used to validate Estimated and Actual Batch values.
TotalGiftCount	Type int Properties Filter, Group, Nillable, Sort Description The total number of gifts in the gift batch.

Associated Objects

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

[GiftBatchChangeEvent](#)

Change events are available for the object.

[GiftBatchFeed](#)

Feed tracking is available for the object.

[GiftBatchHistory](#)

History is available for tracked fields of the object.

[GiftBatchOwnerSharingRule](#)

Sharing rules are available for the object.

[GiftBatchShare](#)

Sharing is available for the object.

GiftCommitment

Represents the commitment made by a donor. 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 only if the Fundraising Access license is enabled and the Fundraising User system permission is assigned to users.

Fields

Field	Details
CampaignId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The campaign associated with this commitment. This field is a relationship field. Relationship Name Campaign Relationship Type Lookup Refers To Campaign
CurrentGiftCmtScheduleId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The current, active schedule of the commitment. This field is a relationship field. Relationship Name CurrentGiftCmtSchedule Relationship Type Lookup Refers To GiftCommitmentSchedule
Description	Type textarea

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update Description The description about the gift commitment.
DonorId	Type reference Properties Create, Filter, Group, Sort, Update Description The person, household, or organization account associated with this commitment. This field is a relationship field. Relationship Name Donor Relationship Type Lookup Refers To Account
DonorGiftConceptId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The gift concept associated with the gift commitment. This field is a relationship field. Relationship Name DonorGiftConcept Relationship Type Lookup Refers To DonorGiftConcept
EffectiveStartDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date from when the commitment is in effect.

Field	Details
EffectiveTransactionInterval	Type int Properties Filter, Group, Nillable, Sort Description The transaction interval that's applicable based on the currently active schedule.
EffectiveTransactionPeriod	Type string Properties Filter, Group, Nillable, Sort Description The transaction period that's applicable based on the currently active schedule.
ExpectedAssetMaturityDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The expected maturity date of all the committed assets for a commitment.
ExpectedAssetTransferDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The expected date of transferring all the committed assets for a commitment.
ExpectedEndDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date when the total amount of the commitment is expected to be fully paid.
ExpectedTotalCmtAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The total donation amount that's expected for this commitment.

Field	Details
FormalCommitmentType	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the formality type of the commitment. Possible values are: • Verbal • Written The default value is Verbal.
FulfillmentType	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies whether the commitment fulfillment depends on one or more conditions or is unconditional. Possible values are: • Conditional • Unconditional The default value is Unconditional.
GiftAgreementId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The gift agreement associated with the gift commitment. This field is a relationship field. Relationship Name GiftAgreement Relationship Type Lookup Refers To GiftAgreement
GiftVehicle	Type picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the vehicle that's used to fulfill a gift commitment. Possible values are: • Bequest • Charitable Gift Annuity • Donor Advised Fund • Life Insurance • Other • Pooled Income Fund • Trust
GiftVehicleType	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the type of gift vehicle that fulfills the gift commitment. Possible values are: • Charitable Lead Trust • Charitable Remainder Trust • Deferred Gift Annuity • Flexible Gift Annuity • Immediate Gift Annuity • Other
IsAssetTransferExpected	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the donor intends to transfer non-monetary assets or not. The default value is <code>false</code>.
LastPaidTransactionDate	Type date Properties Filter, Group, Nillable, Sort

Field	Details
	Description The date of the last paid transaction for the commitment.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate isn't null, the user accessed this record or list view indirectly.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the gift commitment.
NextTransactionAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The expected amount of the next gift transaction in the commitment schedule. This is calculated automatically based on the currently active schedule.
NextTransactionDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date of the next gift transaction in the commitment schedule. This is calculated automatically based on the currently active schedule.

Field	Details
OpportunityId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The opportunity associated with this commitment. This field is a relationship field. Relationship Name Opportunity Relationship Type Lookup Refers To Opportunity
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description ID of the owner of this object. This field is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
PartyPhilanthropicRsrchPrflId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The research profile related to the gift commitment. This field is a relationship field. Relationship Name PartyPhilanthropicRsrchPrfl Relationship Type Lookup

Field	Details
	Refers To PartyPhilanthropicRsrchPrfl
PlannedGiftId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The planned gift associated with the gift commitment. This field is a relationship field. Relationship Name PlannedGift Relationship Type Lookup Refers To PlannedGift
RecurrenceType	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the type of recurrence of a commitment. Possible values are: - Fixed Length - Open Ended The default value is Open Ended.
ScheduleType	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the schedule and type of the commitment. Possible values are: - Custom - Recurring The default value is Recurring.

Field	Details
Status	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update Description Specifies the status of the commitment. Possible values are: • Active • Closed • Draft • Failing • Lapsed • Paused The default value is <code>Draft</code>.
TotCommitmentScheduleAmt	Type currency Properties Filter, Nillable, Sort Description The total expected donation amount that's calculated across all schedules in this commitment. This field is a calculated field.
TotExpcAssetMaturityVal	Type currency Properties Create, Filter, Nillable, Sort, Update Description The expected maturity value of all the committed assets for a commitment.
TotExpcAssetTransferVal	Type currency Properties Create, Filter, Nillable, Sort, Update Description The total expected value of all the committed assets when they're transferred for a commitment.
TotalAssetPresentValue	Type currency

Field	Details
	Properties Create, Filter, Nillable, Sort, Update Description The total current value of all the committed assets for a commitment.
TotalCurrentMonth	Type currency Properties Create, Filter, Nillable, Sort, Update Description The total value of all gift commitments made for the current month. This field is available from API version 62.0 and later.
TotalCurrentQuarter	Type currency Properties Create, Filter, Nillable, Sort, Update Description The total value of all gift commitments made for the current quarter. This field is available from API version 62.0 and later.
TotalCurrentYear	Type currency Properties Create, Filter, Nillable, Sort, Update Description The total value of all gift commitments made for the current year. This field is available from API version 62.0 and later.
TotalNextYear	Type currency Properties Create, Filter, Nillable, Sort, Update Description The total value of all gift commitments made for the next year. This field is available from API version 62.0 and later.
TotalPaidTransactionAmount	Type currency Properties Filter, Nillable, Sort

Field	Details
	Description The total amount of paid gift transactions for the commitment.
TransactionPaymentCount	Type int
	Properties Filter, Group, Nillable, Sort
	Description The number of paid gift transactions for the commitment.
WrittenOffAmount	Type currency
	Properties Filter, Nillable, Sort
	Description The total amount of written-off gift transactions for this commitment.

Associated Objects

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

[GiftCommitmentChangeEvent](#) (API Version 62.0)

Change events are available for the object.

[GiftCommitmentFeed](#)

Feed tracking is available for the object.

[GiftCommitmentHistory](#)

History is available for tracked fields of the object.

[GiftCommitmentOwnerSharingRule](#) (API Version 64.0)

Sharing rules are available for the object.

[GiftCommitmentShare](#)

Sharing is available for the object.

GiftCmtChangeAttrLog

Represents the history of changes to a Gift Commitment over time with attribution to the source campaign or source code attributed to that change. This object is available in API version 60.0 and later.

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

Supported Calls

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

Special Access Rules

This object is available only if the Fundraising Access license is enabled and the Fundraising User system permission is assigned to users.

Fields

Field	Details
CampaignId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The campaign associated with this commitment. This field is a relationship field. Relationship Name Campaign Relationship Type Lookup Refers To Campaign
ChangePerDayAmount	Type currency Properties Create, Filter, Sort, Update Description The change in amount of the commitment converted to amount per day.
ChangeStatus	Type picklist Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update Description The status of the change to the commitment. Possible values are: - Downgrade - Neutral

Field	Details
	• Pause • Resume • Upgrade The default value is Upgrade.
ChangeType	Type picklist Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update Description Specifies the type of change to the commitment. It's value is populated based on the current schedule and the schedule before it. Possible values are: • Amount- When the amount changes, comparing the actual amount on the schedule. • Frequency- When the Transaction Interval or Transaction Period changes. • Frequency and Amount- When both the interval and the amount changes. Applies when the first commitment is scheduled, the current schedule is paused or when a paused schedule is resumed. The default value is Frequency.
EffectiveDate	Type date Properties Create, Filter, Group, Sort, Update Description The effective date for the commitment change.
GiftCommitmentId	Type reference Properties Create, Filter, Group, Sort Description The commitment associated with this gift commitment schedule. This field is a relationship field. Relationship Name GiftCommitment Relationship Type Master-Detail Refers To GiftCommitment

Field	Details
GiftCommitmentScheduleId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The gift commitment schedule associated with the gift transaction. This field is a relationship field. Relationship Name GiftCommitmentSchedule Relationship Type Lookup Refers To GiftCommitmentSchedule
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate isn't null, the user accessed this record or list view.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description The name of the gift commitment schedule.
OutreachSourceCodeId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The outreach source code associated with this gift commitment attribution change log. This field is a relationship field.
	Relationship Name OutreachSourceCode
	Relationship Type Lookup
	Refers To OutreachSourceCode

Associated Objects

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

[GiftCmtChangeAttrLogFeed](#)

Feed tracking is available for the object.

[GiftCmtChangeAttrLogHistory](#)

History is available for tracked fields of the object.

GiftCommitmentSchedule

Represents the schedule for fulfilling the commitment. This object is available in API version 59.0 and later.

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

Supported Calls

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

Special Access Rules

This object is available only if the Fundraising Access license is enabled and the Fundraising User system permission is assigned to users.

Fields

Field	Details
CampaignId	Type reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update Description The campaign associated with this gift commitment schedule. All gift transactions associated with this gift commitment schedule are associated with this campaign. This field is a relationship field. Relationship Name Campaign Relationship Type Lookup Refers To Campaign
CampaignName	Type string Properties Filter, Group, Nillable, Sort Description The name of the campaign associated with the gift commitment schedule.
CommitmentUpdateReason	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The reason the gift commitment schedule changed. Possible values are: • Payment Method Declined • Financial Hardship
EndDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The end date of the new schedule for this gift commitment.
GiftCommitmentId	Type reference Properties Create, Filter, Group, Sort

Field	Details
	Description The commitment associated with this gift commitment schedule. A value is always required in this field to save the record. This field is a relationship field. Relationship Name GiftCommitment Relationship Type Master-Detail Refers To GiftCommitment
GiftCommitmentName	Type string Properties Filter, Group, Nillable, Sort Description The name of the related gift commitment.
GiftCommitmentSchdBefEditId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The schedule that's associated with the current gift commitment schedule before it was edited This field is a relationship field. Relationship Name GiftCommitmentSchdBefEdit Relationship Type Lookup Refers To GiftCommitmentSchedule
GiftCommitmentStatus	Type picklist Properties Defaulted on create, Filter, Group, Nillable, Sort Description The status of the gift commitment that's fulfilled by the schedule. Possible values are: • Active

Field	Details
	• Closed • Draft • Failing • Lapsed • Paused The default value is Draft.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate isn't null, the user accessed this record or list view.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description The name of the gift commitment schedule.
OutreachSourceCodeId	Type lookup Properties Create, Filter, Group, Nillable, Sort, Update Description The outreach source code associated with the gift transaction. This field is a relationship field. This field is available from API version 60.0 and later. Relationship Name OutreachSourceCode Relationship Type Lookup

Field	Details
	Refers To OutreachSourceCode
PaymentInstrumentId	Type lookup Properties Create, Filter, Group, Nillable, Sort, Update Description The Payment Instrument used to complete the transaction. This field is available from API version 60.0 and later. This field is a relationship field. Relationship Name PaymentInstrument Relationship Type Lookup Refers To PaymentInstrument
PaymentMethod	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The payment method for the transactions associated with this gift commitment schedule. All transactions associated with the commitment schedule default to this gift payment method. Possible values are: • ACH • Asset • Cash • Check • Credit Card • Cryptocurrency • In-Kind • PayPal • Stock • Unknown • Venmo

Field	Details
ProcessorReference	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The reference of the payment processor associated with the payment instrument. This field is available from API version 60.0 and later.
StartDate	Type date Properties Create, Filter, Group, Sort, Update Description The start date of the new schedule for this gift commitment. A value is always required in this field to save the record.
TotalScheduleAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The expected total amount of all gift transactions associated with the gift commitment schedule.
TransactionAmount	Type currency Properties Create, Filter, Sort, Update Description The gift amount of each transaction associated with the gift commitment schedule. A value is always required in this field to save the record.
TransactionDay	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The day of the month to create gift transaction in the future for a monthly or yearly transaction period. If you select the day as 29 or 30, the gift transaction will be created on the last day for months that don't have that many days. Possible values are the numbers 1 through 30 or the value <code>LastDay</code>. The default value is 1.

Field	Details
	Always required when the Transaction Period is Monthly.
TransactionInterval	Type int Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update Description The interval of running the gift commitment schedule. The transaction period and interval define how the schedule is run. For example, if the transaction period is monthly and the transaction interval is 3, the schedule is run after every three months.
TransactionPeriod	Type picklist Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update Description The period for which the gift commitment schedule is run. The transaction period and frequency define how the schedule is run. For example, if the transaction period is monthly and the transaction frequency is 3, the schedule is run after every three months. A value is always required in this field to save the record. Possible values are: • Custom • Daily • Monthly • Weekly • Yearly The default value is <code>Monthly</code>.
Type	Type picklist Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update Description Specifies the type of gift commitment schedule. A value is always required in this field to save the record. Possible values are: • Create Transactions • Pause Transactions The default value is <code>Create Transactions</code>.

Associated Objects

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

GiftCommitmentScheduleChangeEvent (API Version 62.0)

Change events are available for the object.

GiftCommitmentScheduleFeed

Feed tracking is available for the object.

GiftCommitmentScheduleHistory

History is available for tracked fields of the object.

GiftCommitmentScheduleOwnerSharingRule (API Version 64.0)

Sharing rules are available for the object.

GiftCommitmentScheduleShare (API Version 64.0)

Sharing is available for the object.

GiftDefaultDesignation

Represents the default designation for gifts that originate from an opportunity, campaign, or commitment. 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 only if the Fundraising Access license is enabled and the Fundraising User system permission is assigned to users.

Fields

Field	Details
AllocatedPercentage	Type percent Properties Create, Filter, Sort, Update Description The percentage of the gift that's allocated to this designation.
GiftDesignationId	Type reference Properties Create, Filter, Group, Sort, Update

Field	Details
	Description The gift designation associated with this gift default designation. A value is always required in this field to save the record. This field is a relationship field. Relationship Name GiftDesignation Relationship Type Lookup Refers To GiftDesignation
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate isn't null, the user accessed this record or list view.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description The auto-numbered name that uniquely identifies this gift default designation.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description ID of the owner of this object. ID of the creator of this object. This field is a polymorphic relationship field.

Field	Details
	Relationship Name Owner
	Relationship Type Lookup
	Refers To Group, User
ParentRecordId	Type reference
	Properties Create, Filter, Group, True, Sort, Update
	Description The parent record of this gift default designation. A value is always required in this field to save the record. This field is a polymorphic relationship field.
	Relationship Name ParentRecord
	Relationship Type Lookup
	Refers To Campaign, GiftCommitment, Opportunity

Associated Objects

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

GiftDefaultDesignationChangeEvent (API Version 64.0)

Change events are available for the object.

GiftDefaultDesignationFeed

Feed tracking is available for the object.

GiftDefaultDesignationHistory

History is available for tracked fields of the object.

GiftDefaultDesignationOwnerSharingRule (API Version 64.0)

Sharing rules are available for the object.

GiftDefaultDesignationShare

Sharing is available for the object.

GiftDefaultSoftCredit

Represents the default allocation for soft credits on gift commitment transactions that are created by a recurrence engine and credited to constituents who influenced the commitment. This object is available in API version 62.0 and later.

Supported Calls

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

Special Access Rules

This object is available only if the Fundraising Access license is enabled and the Fundraising User system permission is assigned to users.

Fields

Field	Details
<code>LastReferencedDate</code>	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
<code>LastViewedDate</code>	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.
<code>Name</code>	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description The unique, auto-numbered name of the gift default soft credit.
<code>OwnerId</code>	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description ID of the owner of this object. This field is a polymorphic relationship field.

Field	Details
	Relationship Name Owner
	Refers To Group, User
ParentRecordId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The parent opportunity, or gift commitment record that's related to this default soft credit. This field is a polymorphic relationship field.
	Relationship Name ParentRecord
	Refers To GiftCommitment, Opportunity
PartialAmount	Type currency
	Properties Create, Filter, Nillable, Sort, Update
	Description The amount of the gift transaction that's allocated as a soft credit to the specified recipient.
PartialPercent	Type percent
	Properties Create, Filter, Nillable, Sort, Update
	Description The percentage of the gift transaction that's allocated as a soft credit to the specified recipient.
RecipientId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The person or organization account that's associated with the soft credit. This field is a relationship field.
	Relationship Name Recipient

Field	Details
	Refers To Account
Role	Type picklist Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The soft credit role of the account or contact. Possible values are: • Honoree • Household Member • Influencer • Matched Donor • Other • Soft Credit • Solicitor • Third Party Donor The default value is Soft Credit.

Associated Objects

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

GiftDefaultSoftCreditChangeEvent (API Version 64.0)

Change events are available for the object.

GiftDefaultSoftCreditFeed (API Version 64.0)

Feed tracking is available for the object.

GiftDefaultSoftCreditHistory

History is available for tracked fields of the object.

GiftDefaultSoftCreditOwnerSharingRule

Sharing rules are available for the object.

GiftDefaultSoftCreditShare

Sharing is available for the object.

GiftDesignation

Represents a designation that can be assigned to a gift transaction. 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 only if the Fundraising Access license is enabled and the Fundraising User system permission is assigned to users.

Fields

Field	Details
AverageTransactionAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The average value of all paid gift transactions related to the related gift designation. Data Processing Engine calculates this value by dividing the gift designation's total transaction amount by its total transaction count. You can schedule this calculation to run on a regular basis.
CurrentYearTransactionCount	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The count of the current year's paid transactions related to the related gift designation. Data Processing Engine calculates this value by counting the gift designation's paid gift transactions with a transaction date in this calendar year. You can schedule this calculation to run on a regular basis.
CurrentYearTrxnAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The value of the current year's paid transactions related to the related gift designation. Data Processing Engine calculates this value by adding the amounts of the gift designation's paid gift transactions with a transaction date this calendar year. You can schedule this calculation to run on a regular basis.
Description	Type textarea

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update Description The description of the gift designation.
FirstPaidTransactionDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date of the first paid gift transaction related to the related gift designation. Data Processing Engine calculates this value by finding the date of the first paid gift transaction related to the gift designation. You can schedule this calculation to run on a regular basis.
HighestTransactionAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The highest transaction value associated with the related gift designation. Data Processing Engine calculates this value by finding the amount of the largest paid gift transaction related to the gift designation. You can schedule this calculation to run on a regular basis.
IsActive	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates if the gift designation is active (<code>true</code>) or not (<code>false</code>). The default value is <code>true</code>.
IsDefault	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the unrestricted gift amount is to be allocated to this designation as default (<code>true</code>) or not (<code>false</code>). There can only be a single designation with this set to <code>true</code> at a time. The default value is <code>false</code>.

Field	Details
LastPaidTransactionDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date of the most recent paid gift transaction related to the related gift designation. Data Processing Engine calculates this value by finding the date of the most recent related paid gift transaction related to the gift designation. You can schedule this calculation to run on a regular basis.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastTwoYearTrxnAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The value of the gift transactions completed two calendar years ago related to the related gift designation. Data Processing Engine calculates this value by adding the amounts of all paid gift transactions related to the gift designation with a transaction date from two calendar years ago. You can schedule this calculation to run on a regular basis.
LastTwoYearTrxnCount	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The count of gift transactions made two calendar years ago that are related to the related gift designation. Data Processing Engine calculates this value by counting all paid gift transactions related to the gift designation with a transaction date from two calendar years ago. You can schedule this calculation to run on a regular basis.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort

Field	Details
	Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view.
<code>LastYearTransactionCount</code>	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The count of gift transactions related to the related gift designation and made last calendar year. Data Processing Engine calculates this value by counting all paid gift transactions related to the gift designation with a transaction date in the last calendar year. You can schedule this calculation to run on a regular basis.
<code>LastYearTrxnAmount</code>	Type currency Properties Create, Filter, Nillable, Sort, Update Description The value of gift transactions related to the related gift designation and completed last calendar year. Data Processing Engine calculates this value by adding the amounts of all paid gift transactions related to the gift designation with a transaction date from the last calendar year. You can schedule this calculation to run on a regular basis.
<code>LowestTransactionAmount</code>	Type currency Properties Create, Filter, Nillable, Sort, Update Description The value of the smallest paid transaction related to the related gift transaction. Data Processing Engine calculates this value by finding the smallest paid gift transaction amount related to the related gift designation. You can schedule this calculation to run on a regular basis.
<code>Name</code>	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the gift designation.
<code>OwnerId</code>	Type reference

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update Description ID of the owner of this object. This field is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
TotalTransactionAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The total value of all gift transactions related to the related gift designation. Data Processing Engine calculates this value by adding the total amounts of all paid gift transactions related to the gift designation. You can schedule this calculation to run on a regular basis.
TotalTransactionCount	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The count of all paid transactions related to the related gift designation. Data Processing Engine calculates this value counting the paid gift transactions related to the gift designation. You can schedule this calculation to run on a regular basis.

Associated Objects

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

GiftDesignationChangeEvent (API Version 64.0)

Change events are available for the object.

GiftDesignationFeed

Feed tracking is available for the object.

GiftDesignationHistory

History is available for tracked fields of the object.

GiftDesignationOwnerSharingRule (API Version 64.0)

Sharing rules are available for the object.

GiftDesignationShare

Sharing is available for the object.

GiftEntry

Represents gifts created individually or in a batch before they're processed and logged in their target records. After processing, these records serve as an audit trail for gift transactions. This object is available in API version 59.0 and later.

Supported Calls

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

Special Access Rules

This object is available only if the Fundraising Access license is enabled and the Fundraising User system permission is assigned to users.

Fields

Field	Details
CampaignId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The campaign that's associated with the gift entry. This field is a relationship field. Relationship Name Campaign Relationship Type Lookup Refers To Campaign
CheckDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date on the check that is used as the payment method for the gift.

Field	Details
City	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The city where the donor resides.
Country	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The country where the donor resides.
CurrencyIsoCode	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Identifies the currency used for the gift transaction. Valid value is: • USD—U.S. Dollar The default value is USD. Available in API version 61.0 and later.
DonorCoverAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The fee amount that a donor pays in addition to the gift amount.
DonorId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The person, household, or organization account associated with the gift. This field is a relationship field. Relationship Name Donor

Field	Details
	Relationship Type Lookup Refers To Account
EffectiveStartDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date from when the commitment is in effect. Available in API version 61.0 and later.
Email	Type email Properties Create, Filter, Group, Nillable, Sort, Update Description The email of the donor.
ExpectedEndDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date when the total amount of the commitment is expected to be paid. Available in API version 61.0 and later.
ExpiryMonth	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The month of the credit card expiration date. This field is available from API version 60.0 and later.
ExpiryYear	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The year of the credit card expiration date. This field is available from API version 60.0 and later.

Field	Details
FirstName	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The first name of the donor.
GiftAmount	Type currency Properties Create, Filter, Sort, Update Description The amount of the gift.
GiftBatchId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The parent gift batch that's associated with the gift entry. This field is a relationship field. Relationship Name GiftBatch Relationship Type Lookup Refers To GiftBatch
GiftCommitmentId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The gift commitment that's associated with the gift entry. This field is a relationship field. Relationship Name GiftCommitment Relationship Type Lookup Refers To GiftCommitment

Field	Details
GiftDesignation1Amount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The amount to be allocated to designation 1.
GiftDesignation1Id	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The name of the designation 1 to which the gift amount is to be allocated. This field is a relationship field. Relationship Name GiftDesignation1 Relationship Type Lookup Refers To GiftDesignation
GiftDesignation1Percent	Type percent Properties Create, Filter, Nillable, Sort, Update Description The percentage of gift amount to be allocated to designation 1 if the direct amount isn't being allocated.
GiftDesignation2Amount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The amount to be allocated to designation 2.
GiftDesignation2Id	Type reference Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The name of the designation 2 to which the gift amount is to be allocated. This field is a relationship field. Relationship Name GiftDesignation2 Relationship Type Lookup Refers To GiftDesignation
GiftDesignation2Percent	Type percent Properties Create, Filter, Nillable, Sort, Update Description The percentage of gift amount to be allocated to designation 2 if the direct amount isn't being allocated.
GiftDesignation3Amount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The amount to be allocated to designation 3.
GiftDesignation3Id	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The name of the designation 3 to which the gift amount is to be allocated. This field is a relationship field. Relationship Name GiftDesignation3 Relationship Type Lookup Refers To GiftDesignation
GiftDesignation3Percent	Type percent

Field	Details
	Properties Create, Filter, Nillable, Sort, Update Description The percentage of gift amount to be allocated to designation 3 if the direct amount isn't being allocated.
GiftProcessingResult	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The processing result of the gift entry record.
GiftDesignationInformation	Type textarea Properties Create, Nillable, Update Description Details about the gift designation such as the designation name, amount, or percentage of the gift that's allocated to the designation. Available in API version 66.0 and later.
GiftProcessingStatus	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the processing status of the gift entry. Possible values are: • Failure • New • Success The default value is New.
GiftReceivedDate	Type date Properties Create, Filter, Group, Sort, Update Description The date when the gift is received.

Field	Details
GiftTransactionId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The gift transaction that's associated with the gift entry. This field is a relationship field. Relationship Name GiftTransaction Relationship Type Lookup Refers To GiftTransaction
GiftType	Type picklist Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update Description Specifies the type of gift that's associated with the gift entry. Possible values are: • Individual • Organizational The default value is <code>Individual</code>.
HomePhone	Type phone Properties Create, Filter, Group, Nillable, Sort, Update Description The home phone number of the donor.
IsNewRecurringGift	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the gift is a new recurring gift commitment (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>. Available in API version 61.0 and later.

Field	Details
IsSetAsDefault	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the values in the gift entry are used as default values in other gift entries of the gift batch or not. The default value is <code>false</code>.
Last4	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The last 4 digits of the credit card or bank account. This field is available from API version 60.0 and later.
LastName	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The last name of the donor.
LastProcessedDateTime	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The date and time when the gift entry was last processed.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	Type dateTime

Field	Details
	Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> isn't null, the user accessed this record or list view.
MobilePhone	Type phone Properties Create, Filter, Group, Nillable, Sort, Update Description The mobile number of the donor.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description The name of the gift entry record.
OrganizationName	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The name of the donating organization that's associated with the gift entry.
OutreachSourceCodeId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The outreach source code that's associated with the campaign for the gift entry record. This field is a relationship field. Relationship Name OutreachSourceCode Relationship Type Lookup Refers To OutreachSourceCode

Field	Details
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description ID of the owner of this object. ID of the creator of this object. This field is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
PaymentIdentifier	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The identifier of the payment method for the gift, such as check number, transaction order number, merchant order number.
PaymentMethod	Type picklist Properties Create, Filter, Group, Sort, Update Description Specifies the payment method used for this gift. Possible values are: • ACH • Asset • Cash • Check • Credit Card • Cryptocurrency • In-Kind • PayPal • Stock • Unknown • Venmo

Field	Details
PostalCode	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The postal code from the donor's address.
Salutation	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the honorific abbreviation, word, or phrase to be used in front of the donor's name in greetings, such as Dr. or Mrs. Possible values are: • Dr . • Mr . • Mrs . • Ms . • Mx . • Prof .
SoftCreditInformation	Type textarea Properties Create, Nillable, Update Description The information about the soft credit, such as the name of the soft creditor, role, and amount or percentage of soft credit allocated to the soft creditor.
State	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The name of the state or province where the donor resides.
Street	Type string Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The street details from the donor's address.
TotalTransactionFeeAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The total transaction fees charged by the payment processor for the gift. For example, application fees, processing fees.
TransactionDay	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the day of the month to create gift transaction in the future for a monthly transaction period. If you select the day as 29 or 30, the gift transaction will be created on the last day for months that don't have that many days. Valid values are: numerals 1–30 and LastDay (of the month) The default value is 1. Available in API version 61.0 and later.
TransactionInterval	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The interval of running the gift commitment schedule. The transaction period and interval define how the schedule is run. For example, if the transaction period is monthly and transaction interval is 3, the schedule is run after every three months. Available in API version 61.0 and later.
TransactionPeriod	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The period for which the gift commitment schedule is run. The transaction period and frequency define how the schedule is run. For example, if the transaction period is monthly and transaction frequency is 3, the schedule is run after every three months. Valid values are: Custom

Field	Details
	• <code>Daily</code> • <code>Monthly</code> • <code>Weekly</code> • <code>Yearly</code> The default value is <code>Monthly</code>. Available in API version 61.0 and later.

Associated Objects

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

GiftEntryChangeEvent

Change events are available for the object.

GiftEntryFeed

Feed tracking is available for the object.

GiftEntryHistory

History is available for tracked fields of the object.

GiftEntryOwnerSharingRule

Sharing rules are available for the object.

GiftEntryShare

Sharing is available for the object.

GiftRefund

Represents a refund of a gift. This object is available in API version 59.0 and later.



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

Supported Calls

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

Special Access Rules

This object is available only if the Fundraising Access license is enabled and the Fundraising User system permission is assigned to users.

Fields

Field	Details
Amount	Type currency Properties Create, Filter, Sort, Update Description The amount of the refund.
Date	Type date Properties Create, Filter, Group, Sort, Update Description The date the transaction was refunded.
GatewayTransactionFee	Type currency Properties Create, Filter, Nillable, Sort, Update Description The transaction fee charged by the payment gateway. This field is available from API version 60.0 and later.
GiftTransactionId	Type reference Properties Create, Filter, Group, Sort Description The gift transaction associated with this refund. This field is a relationship field. Relationship Name GiftTransaction Relationship Type Master-Detail Refers To GiftTransaction
LastGatewayErrorMessage	Type string

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update Description The most recent error message that's received by the gateway. This field is available from API version 60.0 and later.
LastGatewayProcessedDate	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The date and time of the last processing attempt by the gateway. This field is available from API version 60.0 and later.
LastGatewayResponseCode	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The most recent response code that's received by the gateway. This field is available from API version 60.0 and later.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate isn't null, the user accessed this record or list view.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort

Field	Details
	Description The unique, auto-numbered name of the gift refund.
ProcessorTransactionFee	Type currency
	Properties Create, Filter, Nillable, Sort, Update
	Description The transaction fee charged by the payment processor. This field is available from API version 60.0 and later.
Reason	Type picklist
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The reason for the refund. Possible values are: • Donor Request • Incorrect Amount
Status	Type picklist
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Specifies the status of the refund. Possible values are: • Completed • Failed • Initiated

Associated Objects

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

[GiftRefundChangeEvent](#) (API Version 62.0)

Change events are available for the object.

[GiftRefundFeed](#)

Feed tracking is available for the object.

GiftRefundHistory

History is available for tracked fields of the object.

GiftRefundOwnerSharingRule (API Version 64.0)

Sharing rules are available for the object.

GiftRefundShare (API Version 64.0)

Sharing is available for the object.

GiftSoftCredit

Represents the soft credit attributed to a person or organization for the gift transaction. This object is available in API version 59.0 and later.



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

Supported Calls

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

Special Access Rules

This object is available only if the Fundraising Access license is enabled and the Fundraising User system permission is assigned to users.

Fields

Field	Details
GiftTransactionId	Type reference Properties Create, Filter, Group, Sort Description The gift transaction associated with this soft credit. This field is a relationship field. Relationship Name GiftTransaction Relationship Type Master-Detail Refers To GiftTransaction
LastReferencedDate	Type dateTime

Field	Details
	Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate isn't null, the user accessed this record or list view
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description The unique, auto-numbered name of the gift soft credit.
PartialAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The amount of the soft credit when it isn't the full transaction amount.
PartialPercent	Type percent Properties Create, Filter, Nillable, Sort, Update Description The percentage of the full transaction amount for this soft credit when it isn't the full transaction amount.  Note: Soft Credit percent values don't need to total to 100% when there are multiple soft credit records.
PartyPhilanthropicRsrchPrflId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The research profile associated with the gift. This field is a relationship field. Relationship Name PartyPhilanthropicRsrchPrfl Relationship Type Lookup Refers To PartyPhilanthropicRsrchPrfl
RecipientId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The person account that's associated with the soft credit. This field is a relationship field. Relationship Name Recipient Relationship Type Lookup Refers To Account
Role	Type picklist Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The soft credit role of the account or contact. Possible values are: • Honoree • Household Member • Influencer • Matched Donor • Other • Soft Credit • Solicitor • Third Party Donor

Field	Details
	The default value is <code>Soft Credit</code> .
<code>SoftCreditAmount</code>	Type currency Properties Filter, Nillable, Sort Description The calculated amount of the soft credit.

Associated Objects

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

[GiftSoftCreditChangeEvent \(API Version 62.0\)](#)

Change events are available for the object.

[GiftSoftCreditFeed](#)

Feed tracking is available for the object.

[GiftSoftCreditHistory](#)

History is available for tracked fields of the object.

[GiftSoftCreditOwnerSharingRule](#)

Sharing rules are available for the object.

[GiftSoftCreditShare \(API Version 64.0\)](#)

Sharing is available for the object.

GiftTransaction

Represents a completed transaction from a gift. 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 only if the Fundraising Access license is enabled and the Fundraising User system permission is assigned to users.

Fields

Field	Details
AcknowledgementDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date when the gift transaction was acknowledged.
AcknowledgementStatus	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update Description Specifies the status of the acknowledgement that's sent for the gift transaction. Possible values are: • Don't Send • Sent • To Be Sent The default value is To Be Sent.
CampaignId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The campaign associated with the gift transaction. This field is a relationship field. Relationship Name Campaign Relationship Type Lookup Refers To Campaign
CheckDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The date on the check.
CurrencyIsoCode	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Identifies the currency used for the gift transaction. Valid value is: • USD—U.S. Dollar The default value is USD. Available in API version 61.0 and later.
CurrentAmount	Type currency Properties Filter, Nillable, Sort Description This field is a calculated field.
Description	Type textarea Properties Create, Filter, Group, Nillable, Sort, Update Description The description of the gift transaction.
DonorCoverAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The amount the donor added to their gift to cover fees. Available in API version 61.0 and later.
DonorGiftConceptId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The gift concept associated with the gift.

Field	Details
	This field is a relationship field. Relationship Name DonorGiftConcept Relationship Type Lookup Refers To DonorGiftConcept
DonorId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The person, household, or organization account associated with the gift transaction. This field is a relationship field. Relationship Name Donor Relationship Type Lookup Refers To Account
GatewayReference	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description Reference of the transaction that the gateway assigned. This field is available from API version 60.0 and later.
GatewayTransactionFee	Type currency Properties Create, Filter, Nillable, Sort, Update Description The transaction fee charged by the payment gateway. This field is available from API version 60.0 and later.
GiftAgreementId	Type reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update Description The gift agreement associated with the gift transaction. This field is a relationship field. Relationship Name GiftAgreement Relationship Type Lookup Refers To GiftAgreement
GiftCommitmentId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The gift commitment associated with the gift transaction. This field is a relationship field. Relationship Name GiftCommitment Relationship Type Lookup Refers To GiftCommitment
GiftCommitmentScheduleId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The gift commitment schedule associated with the gift transaction. This field is a relationship field. Relationship Name GiftCommitmentSchedule Relationship Type Lookup Refers To GiftCommitmentSchedule

Field	Details
GiftType	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the type of gift that's associated with the gift transaction. Possible values are: • Individual • Organizational The default value is Individual.
IsFullyRefunded	Type boolean Properties Defaulted on create, Filter, Group, Sort Description Set to <code>true</code> when Status equals <code>Fully Refunded</code>. You can query and filter on this field, but you cannot directly set the value.
IsPaid	Type boolean Properties Defaulted on create, Filter, Group, Sort Description Set to <code>true</code> when Status equals <code>Paid</code> and Current Amount equals 0. You can query and filter on this field, but you cannot directly set the value.
IsPartiallyRefunded	Type boolean Properties Defaulted on create, Filter, Group, Sort Description Set to <code>true</code> when Status equals <code>Paid</code> and Current Amount is greater than 0. You can query and filter on this field, but you cannot directly set the value.
IsWrittenOff	Type boolean Properties Defaulted on create, Filter, Group, Sort

Field	Details
	Description Set to true when Status equals <code>Written-Off</code>. You can query and filter on this field, but you cannot directly set the value.
<code>LastGatewayErrorMessage</code>	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The most recent error message that's received by the gateway. This field is available from API version 60.0 and later.
<code>LastGatewayProcessedDate</code>	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The date and time of the last processing attempt by the gateway. This field is available from API version 60.0 and later.
<code>LastGatewayResponseCode</code>	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The most recent response code that's received by the gateway. This field is available from API version 60.0 and later.
<code>LastReferencedDate</code>	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
<code>LastViewedDate</code>	Type dateTime Properties Filter, Nillable, Sort

Field	Details
	Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> isn't null, the user accessed this record or list view.
MatchingEmployerTransactionId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The gift transaction made by the employer that matches the gift transaction. This field is a relationship field. Relationship Name MatchingEmployerTransaction Relationship Type Lookup Refers To GiftTransaction
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the gift transaction.
NonTaxDeductibleAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The portion of the gift transaction amount that can't be claimed as a tax deduction by the donor. Available in API version 61.0 and later.
OriginalAmount	Type currency Properties Create, Filter, Sort, Update Description The original amount of gift transaction that includes donor cover and excludes the transaction fees. A value is always required in this field to save the record.

Field	Details
OutreachSourceCodeId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The outreach source code associated with the gift transaction. This field is a relationship field. Relationship Name OutreachSourceCode Relationship Type Lookup Refers To OutreachSourceCode
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description ID of the owner of this object. This field is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
PartyPhilanthropicRsrchPrflId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The research profile associated with the gift. This field is a relationship field. Relationship Name PartyPhilanthropicRsrchPrfl Relationship Type Lookup

Field	Details
	Refers To PartyPhilanthropicRsrchPrfl
PaymentIdentifier	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The reference number associated with the payment method for the gift, such as check number, transaction order number, merchant order number.
PaymentInstrumentId	Type lookup Properties Create, Filter, Group, Nillable, Sort, Update Description The Payment Instrument used to complete the transaction. This field is available from API version 60.0 and later. This field is a relationship field. Relationship Name PaymentInstrument Relationship Type Lookup Refers To PaymentInstrument
PaymentMethod	Type picklist Properties Create, Filter, Group, Sort, Update Description Specifies the payment method used to complete the gift transaction. A value is always required in this field to save the record. Possible values are: • ACH • Asset • Cash • Check • Credit Card • Cryptocurrency • In-Kind

Field	Details
	• PayPal • Stock • Unknown • Venmo
ProcessorReference	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The reference of the payment processor associated with the payment instrument. This field is available from API version 60.0 and later.
ProcessorTransactionFee	Type currency Properties Create, Filter, Nillable, Sort, Update Description The transaction fee charged by the payment processor. This field is available from API version 60.0 and later.
RefundedAmount	Type currency Properties Defaulted on create, Filter, Nillable, Sort Description The amount of the original gift transaction that was refunded. This field is a calculated field.
Status	Type picklist Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Specifies the status of the gift transaction. A value is always required in this field to save the record. Possible values are: • Canceled • Failed • Fully Refunded • Paid

Field	Details
	• Pending • Unpaid • Written-Off The default value is Unpaid.
TaxReceiptStatus	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update Description Specifies the status of the tax receipt for the gift transaction. This field is available from API version 62.0 and later. Possible values are: • Don't Send • Sent • To Be Sent The default value is To Be Sent.
TotalTransactionFee	Type currency Properties Filter, Nillable, Sort Description The total amount of fees charged by the payment gateway and processor for this transaction. This field is available from API version 60.0 and later. This field is a calculated field.
TransactionDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date when the donor completed the gift transaction. This field is required if the gift transaction status is set to Paid or Fully Refunded.
TransactionDueDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The expected date of the scheduled gift transaction. This field is required if the gift transaction is related to a gift commitment.

Associated Objects

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

GiftTransactionChangeEvent (API Version 62.0)

Change events are available for the object.

GiftTransactionFeed

Feed tracking is available for the object.

GiftTransactionHistory

History is available for tracked fields of the object.

GiftTransactionOwnerSharingRule

Sharing rules are available for the object.

GiftTransactionShare

Sharing is available for the object.

GiftTransactionDesignation

Represents a junction between a gift transaction and a gift designation. This object is available in API version 59.0 and later.

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

Supported Calls

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

Special Access Rules

This object is available only if the Fundraising Access license is enabled and the Fundraising User system permission is assigned to users.

Fields

Field	Details
Amount	Type currency

Field	Details
	Properties Create, Filter, Nillable, Sort, Update Description The amount of the transaction allocated to the designation.
GiftDesignationId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The gift designation associated with this transaction designation. A value is always required in this field to save the record. This field is a relationship field. Relationship Name GiftDesignation Relationship Type Lookup Refers To GiftDesignation
GiftTransactionId	Type reference Properties Create, Filter, Group, Sort Description The transaction associated with this transaction designation. A value is always required in this field to save the record. This field is a relationship field. Relationship Name GiftTransaction Relationship Type Master-Detail Refers To GiftTransaction
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort

Field	Details
	Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate is not null, the user accessed this record or list view.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description The auto-numbered name that uniquely identifies this transaction designation.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description ID of the owner of this object. This field is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
Percent	Type percent Properties Create, Filter, Nillable, Sort, Update Description The percentage of the transaction amount allocated to the designation.

Associated Objects

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

GiftTransactionDesignationChangeEvent (API Version 62.0)

Change events are available for the object.

GiftTransactionDesignationFeed

Feed tracking is available for the object.

GiftTransactionDesignationHistory

History is available for tracked fields of the object.

GiftTransactionDesignationOwnerSharingRule (API Version 64.0)

Sharing rules are available for the object.

GiftTransactionDesignationShare

Sharing is available for the object.

GiftTribute

Represents the details and status of the gift tribute. 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 only if the Fundraising Access license is enabled and the Fundraising User system permission is assigned to users.

Fields

Field	Details
GiftCommitmentId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The gift commitment associated with this tribute. This field is a relationship field. Relationship Name GiftCommitment Relationship Type Lookup

Field	Details
	Refers To GiftCommitment
GiftTransactionId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The gift transaction associated with this tribute. This field is a relationship field. Relationship Name GiftTransaction Relationship Type Lookup Refers To GiftTransaction
HonoreeContactId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The contact (person account) associated with the tribute gift transaction. This field is a relationship field. Relationship Name HonoreeContact Relationship Type Lookup Refers To Account
HonoreeInformation	Type textarea Properties Create, Nillable, Update Description The additional details of the tribute recipient.
HonoreeName	Type string

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update Description The name of the person being honored by the tribute gift transaction.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate isn't null, the user accessed this record or list view.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description The unique, auto-numbered name of the gift tribute.
NotificationChannel	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies how to notify the tribute notification contact should be notified. Possible values are: - Email - Mail
NotificationContactId	Type reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update Description The contact (person account) who should be notified of the tribute gift transaction. This field is a relationship field. Relationship Name NotificationContact Relationship Type Lookup Refers To Account
NotificationContactName	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The name of the person who should be notified of the tribute gift transaction.
NotificationDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date when the recipient was notified about the tribute.
NotificationEmail	Type email Properties Create, Filter, Group, Nillable, Sort, Update Description The email that's used to notify a person about the tribute gift transaction.
NotificationInfo	Type textarea Properties Create, Nillable, Update Description The information about the person who should be notified of the tribute gift transaction.

Field	Details
NotificationMessage	Type textarea Properties Create, Nillable, Update Description The notification message that's sent for the tribute gift transaction.
NotificationStatus	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the status of the notification sent to the tribute recipient. Possible values are: • Don't Send • Sent • To Be Sent
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description This field is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
TributeType	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the type of tribute when a gift is given on behalf of someone else. Possible values are: • Honor • Memorial

Associated Objects

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

GiftTributeChangeEvent (API Version 64.0)

Change events are available for the object.

GiftTributeFeed

Feed tracking is available for the object.

GiftTributeHistory

History is available for tracked fields of the object.

GiftTributeOwnerSharingRule (API Version 64.0)

Sharing rules are available for the object.

GiftTributeShare

Sharing is available for the object.

GiftValueForecast

The past, current, and projected monetary value of a gift. This object is available in API version 64.0 and later.

Supported Calls

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

Special Access Rules

This object is available only if the Fundraising Access license is enabled and the Fundraising User system permission is assigned to users.

Fields

Field	Details
ActuarialFactor	Type double Properties Create, Filter, Nillable, Sort, Update Description A factor based on actuarial assumptions that's used to calculate the gift's future value.
CurrentValue	Type currency Properties Create, Filter, Nillable, Sort, Update Description The gift's current value.

Field	Details
GiftId	Type reference Properties Create, Filter, Group, Sort, Update Description The gift associated with the gift value forecast. This field is a polymorphic relationship field. Relationship Name Gift Refers To GiftCommitment, PlannedGift
InitialValue	Type currency Properties Create, Filter, Nillable, Sort, Update Description The gift's initial value.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description
LastUpdatedDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date when the gift's value was last updated.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description
MaturityDate	Type date

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update Description The date when the gift's expected to mature.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description The ID of the gift value forecast record.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description This field is a polymorphic relationship field. Relationship Name Owner Refers To Group, User
ProjectedValue	Type currency Properties Create, Filter, Nillable, Sort, Update Description The gift's projected value at maturity.
StartDate	Type date Properties Create, Filter, Group, Sort, Update Description The start date for tracking the gift's value.

Associated Objects

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

GiftValueForecastChangeEvent

Change events are available for the object.

GiftValueForecastFeed

Feed tracking is available for the object.

GiftValueForecastHistory

History is available for tracked fields of the object.

GiftValueForecastOwnerSharingRule

Sharing rules are available for the object.

GiftValueForecastShare

Sharing is available for the object.

OutreachSourceCode

Represents information about a source code that's associated with an outreach campaign. 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 only if the Fundraising Access license is enabled and the Fundraising User system permission is assigned to users

Fields

Field	Details
AudienceCount	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The number of person accounts, contacts, and businesses in this audience.
AudienceInformation	Type textarea Properties Create, Filter, Group, Nillable, Sort, Update Description Detailed information about the audience for the outreach source code. This field is available from API version 62.0 and later.

Field	Details
CampaignId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The parent campaign associated with this source code. This field is a relationship field. Relationship Name Campaign Relationship Type Lookup Refers To Campaign
CurrencyIsoCode	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Identifies the currency used for the gift transaction. Valid value is: • USD—U.S. Dollar The default value is USD. Available in API version 61.0 and later.
Description	Type textarea Properties Create, Filter, Group, Nillable, Sort, Update Description The description of the source code.
FocusSegmentId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description Lists individuals who are segmented for this source code. This field is available with a Data Cloud license. This field is a relationship field.

Field	Details
	Relationship Name MarketSegment Relationship Type Lookup Refers To MarketSegment
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate isn't null, the user accessed this record or list view.
MessageChannel	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The channel used for the message from which the donation originated. This field is available from API version 60.0 and later. Possible values are: • Digital Paid • Direct Mail • Email • Organic Web • Physical • SMS • Share Partner • Social Organic • Social Paid

Field	Details
	• Telemarketing
MessageChannelPlatform	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The outreach message channel platform from which the donation originated. This field is available from API version 60.0 and later.
MessageChannelPlatformAccount	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The platform account used to send the outreach message. This field is available from API version 60.0 and later.
MessageContent	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The outreach message content. This field is available from API version 60.0 and later.
MessageContentTitle	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The outreach message title. This field is available from API version 60.0 and later.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the source code.
OwnerId	Type reference

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update Description ID of the owner of this object. ID of the creator of this object. This field is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
SentDate	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The date and time that the outreach was sent. Available in API version 61.0 and later.
SourceCode	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The unique source code. This field is unique within your organization.
SourceCodeBaseUrl	Type url Properties Create, Filter, Group, Nillable, Sort, Update Description The base URL for the outreach source code. This field is available from API version 60.0 and later.
SourceCodeUrl	Type url Properties Create, Filter, Group, Nillable, Sort, Update Description The URL with UTM codes that's generated for the outreach source code. This field is available from API version 60.0 and later.

Field	Details
Status	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update Description The status of the source code. Possible values are: • Active • Archived • Inactive The default value is <code>Active</code>.
UsageType	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the usage of the outreach source code. Possible values are: • Fundraising The default value is <code>Fundraising</code>.

Associated Objects

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

[OutreachSourceCodeChangeEvent](#) (API Version 62.0)

Change events are available for the object.

[OutreachSourceCodeFeed](#)

Feed tracking is available for the object.

[OutreachSourceCodeHistory](#)

History is available for tracked fields of the object.

[OutreachSourceCodeOwnerSharingRule](#)

Sharing rules are available for the object.

[OutreachSourceCodeShare](#)

Sharing is available for the object.

OutreachSummary

Represents a summary of results of the outreach campaign. This object is available in API version 59.0 and later.

Supported Calls

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

Special Access Rules

This object is available only if the Fundraising Access license is enabled and the Fundraising User system permission is assigned to users.

Fields

Field	Details
AverageGiftAmount	Type currency Properties Filter, Sort Description The average amount of all gifts in response to the related outreach source code or campaign. Data Processing Engine calculates this value by dividing the total gift transaction amount by the gift count. You can schedule this calculation to run on a regular basis.
AverageOnetimeGiftAmount	Type currency Properties Filter, Sort Description The average amount of all one-time, non-recurring gifts in response to the related outreach source code or campaign. Data Processing Engine calculates this value by dividing the total one-time gift amount by the one-time donor count. You can schedule this calculation to run on a regular basis.
AverageRecurringGiftAmount	Type currency Properties Filter, Sort Description The average amount of all recurring gifts in response to the related outreach source code or campaign. Data Processing Engine calculates this value by dividing the total recurring gift amount by the recurring donor count. You can schedule this calculation to run on a regular basis.
CampaignId	Type reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update Description The campaign associated with this outreach gift summary. You can associate one campaign with an outreach summary. This field is a relationship field. Relationship Name Campaign Relationship Type Lookup Refers To Campaign
DonorCount	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The number of unique donors in response to the related outreach source code or campaign. Data Processing Engine calculates this value by counting the unique donors with paid transactions. You can schedule this calculation to run on a regular basis.
GiftCount	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The number of gifts in response to the related outreach source code or campaign. Data Processing Engine calculates this value by counting the paid gift transactions related to the campaign or source code. You can schedule this calculation to run on a regular basis.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	Type dateTime

Field	Details
	Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description The auto-numbered name that uniquely identifies the outreach summary.
OnetimeDonorCount	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The number of contacts who gave a one-time, non-recurring donation in response to the related outreach source code or campaign. Data Processing Engine calculates this value by counting the unique donors with related gift transactions that are paid and not associated with a gift commitment. You can schedule this calculation to run on a regular basis.
OutreachSourceCodeId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The outreach source code associated with this outreach gift summary. You can associate one outreach source code with an outreach summary. This field is a relationship field. Relationship Name OutreachSourceCode Relationship Type Lookup Refers To OutreachSourceCode
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	Description ID of the owner of this object. This field is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
RecurringDonorCount	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The number of contacts who gave a recurring donation in response to the related outreach source code or campaign. Data Processing Engine calculates this value by counting the unique donors for gift transactions that are paid and related to recurring gift commitments. You can schedule this calculation to run on a regular basis.
ResponseRate	Type percent Properties Create, Filter, Nillable, Sort, Update Description The percentage of responses received from donors to the related outreach source code or campaign. Data Processing Engine calculates this value by dividing the donor count by the audience count. You can schedule this calculation to run on a regular basis.
TotalGiftTransactionAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The total value of all paid gifts in response to the related outreach source code or campaign. Data Processing Engine calculates this value by adding the amounts of all paid gift transactions. You can schedule this calculation to run on a regular basis.
TotalOnetimeGiftAmount	Type currency Properties Create, Filter, Nillable, Sort, Update

Field	Details
	Description The total value of all one-time gifts in response to the related outreach source code or campaign. Data Processing Engine calculates this value by adding the total amounts of all related paid gift transactions that aren't related to a gift commitment. You can schedule this calculation to run on a regular basis.
TotalRecurringGiftAmount	Type currency
	Properties Create, Filter, Nillable, Sort, Update
	Description The total value of all recurring gifts in response to the related outreach source code or campaign. Data Processing Engine calculates this value by adding the total amounts of all paid gift transactions that are related to recurring gift commitments. You can schedule this calculation to run on a regular basis.

Associated Objects

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

OutreachSummaryFeed

Feed tracking is available for the object.

OutreachSummaryHistory

History is available for tracked fields of the object.

OutreachSummaryShare

Sharing is available for the object.

PartyCategory

The criteria for categorizing contacts and accounts based on specific classification information for a specified time period. This object is available in API version 64.0 and later.

Supported Calls

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

Special Access Rules

This object is available only if the Fundraising Access license is enabled and the Fundraising User system permission is assigned to users.

Fields

Field	Details
AccountId	Type reference Properties Create, Filter, Group, Sort, Update Description The account ID related to the classification record. This field is a relationship field. Relationship Name Account Refers To Account
Classification	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The classification associated with the contact or account. Possible values are: • High Net Worth Prospect • Influencer Prospect • LYBUNT • Lapsed Donor • Legacy Prospect • Lifetime Stewardship • SYBUNT • Top 100 • Top 25 • Undergrad or Grad Prospect
ContactId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The contact ID related to the classification record. This field is a relationship field.

Field	Details
	Relationship Name Contact
	Refers To Contact
EndDate	Type date
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The end date of the classification.
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description
LastViewedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description
Name	Type string
	Properties Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description The ID of the classification record.
OwnerId	Type reference
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description This field is a polymorphic relationship field.
	Relationship Name Owner
	Refers To Group, User

Field	Details
StartDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The start date of the classification.
Status	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the status of the classification record. Possible values are: • Active • Archived • Error • Inactive • Pending • Superseded

Associated Objects

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

[PartyCategoryHistory](#) on page 736

History is available for tracked fields of the object.

[PartyCategoryOwnerSharingRule](#) on page 734

Sharing rules are available for the object.

[PartyCategoryShare](#) on page 733

Sharing is available for the object.

PartyPhilanthropicAssessment

Represents a formalized assessment of wealth when a rating takes place, such as a third-party wealth assessment, a property valuation, a financial asset assessment, or an internal assessment. This object is available in API version 63.0 and later.

Supported Calls

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

Fields

Field	Details
AccountId	Type reference Properties Create, Filter, Group, Sort, Update Description The account associated with the assessment. This field is a relationship field. Relationship Name Account Refers To Account
AssessmentOrganizationId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The organization performing the assessment. This field is a relationship field. Relationship Name AssessmentOrganization Refers To Account
AssessmentType	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The type of assessment, such as executive summary, donor brief, or third-party assessment. Possible values are: • Donor Brief • Executive Summary • Third Party Assessment
AssetLiquidationValue	Type currency

Field	Details
	Properties Create, Filter, Nillable, Sort, Update Description The value of the party's assets that can be liquidated within a specified time period.
AttributedUserId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The person the research is attributed to. This field is a relationship field. Relationship Name AttributedUser Refers To User
BusinessOwnershipValue	Type currency Properties Create, Filter, Nillable, Sort, Update Description The value of private businesses owned by the party.
CaseId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The case that delivers the research. This field is a relationship field. Relationship Name Case Relationship Type Lookup Refers To Case
ContactId	Type reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update Description The contact associated with the assessment. This field is a relationship field. Relationship Name Contact Refers To Contact
Date	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date of the assessment.
ExtendedSummary	Type textarea Properties Create, Nillable, Update Description A detailed summary of the assessment.
GivingLevel	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The party's giving level. Possible values are: • \$1,000,000–\$4,999,999 • \$1,000–\$2,499 • \$10,000,000–\$24,999,999 • \$10,000–\$24,999 • \$100,000–\$249,999 • \$100–\$499 • \$2,500–\$4,999 • \$25,000,000+ • \$25,000–\$49,999

Field	Details
	• \$250,000–\$999,999 • \$5,000,000–\$9,999,999 • \$5,000–\$9,999 • \$50,000–\$99,999 • \$500–\$999 • Under \$100
GraduationCohort	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The party's graduation cohort, if the party is a person. Possible values are: • 0–5 Years Since Graduation • 11–20 Years Since Graduation • 21–30 Years Since Graduation • 31–40 Years Since Graduation • 41–50 Years Since Graduation • 50+ Years Since Graduation • 6–10 Years Since Graduation
GraduationStatus	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The party's graduation status, if the party is a person. Possible values are: • Associate Degree • Certificate or Award • Multiple Degrees • Non-Graduate • Other • Postgraduate Degree • Secondary Diploma • Undergraduate Degree

Field	Details
Income	Type currency Properties Create, Filter, Nillable, Sort, Update Description The party's annual income.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view. If this value is null, the user might have only accessed this record or list view (<code>LastReferencedDate</code>) but not viewed it.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description An auto-generated string or number assigned to the assessment.
OtherAssetsValue	Type currency Properties Create, Filter, Nillable, Sort, Update Description The value of the party's assets not covered by other measures of net worth.
OtherNonprofitGiftAmount	Type currency Properties Create, Filter, Nillable, Sort, Update

Field	Details
	Description The monetary value of the party's donations to other nonprofits.
OtherNonprofitGiftCount	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The number of the party's donations to other nonprofits.
OverallRating	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The overall rating determined by the assessment. Possible values are: • High • Low • Medium
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The user who owns this record. This field is a polymorphic relationship field. Relationship Name Owner Refers To Group, User
PartyPhilanthropicRsrchPrflId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The research profile associated with the research. This field is a relationship field.

Field	Details
	Relationship Name PartyPhilanthropicRsrchPrfl Relationship Type Lookup Refers To PartyPhilanthropicRsrchPrfl
RealEstateValue	Type currency Properties Create, Filter, Nillable, Sort, Update Description The value of real estate owned by the party.
ResearchEndDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The end date of the research, used to measure the research period and assess the efficiency of the research.
ResearchHours	Type double Properties Create, Filter, Nillable, Sort, Update Description The total hours spent on research for the assessment, used to track resource allocation and time spent on researching each prospect.
ResearchSharedDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date the completed research is shared with the relationship officer, used to ensure transparency and track the flow of information in prospect engagement.
ResearchStartDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The start date of the research, used to create a timeline for the research process and track the duration of the research phase.
ResponsiblePersonId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The relationship officer assigned to the party. This field is a relationship field. Relationship Name ResponsiblePerson Refers To User
RetirementSavingsAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The party's retirement savings.
ShortSummary	Type textarea Properties Create, Filter, Nillable, Sort, Update Description A short summary of the assessment.
StockValue	Type currency Properties Create, Filter, Nillable, Sort, Update Description The value of public stock owned by the party.
StrengthsAndOpportunities	Type textarea Properties Create, Nillable, Update

Field	Details
	Description The strengths and opportunities identified in the assessment.
WeaknessesAndDrawbacks	Type textarea Properties Create, Nillable, Update Description The weaknesses and drawbacks identified in the assessment.
WealthAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The party's total wealth.

Associated Objects

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

[PartyPhilanthropicAssessmentHistory](#) on page 736

History is available for tracked fields of the object.

[PartyPhilanthropicAssessmentOwnerSharingRule](#) on page 734

Sharing rules are available for the object.

[PartyPhilanthropicAssessmentShare](#) on page 733

Sharing is available for the object.

PartyPhilanthropicIndicator

Represents an unconfirmed or soft indication that highlights a person's wealth or growth potential. This object is available in API version 63.0 and later.

Supported Calls

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

Fields

Field	Details
AccountId	Type reference Properties Create, Filter, Group, Sort, Update Description The account associated with the indicator. This field is a relationship field. Relationship Name Account Refers To Account
AttributedUserId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The person the research is attributed to. This field is a relationship field. Relationship Name AttributedUser Refers To User
CaseId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The case that delivers the research. This field is a relationship field. Relationship Name Case Relationship Type Lookup Refers To Case

Field	Details
ContactId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The contact associated with the indicator. This field is a relationship field. Relationship Name Contact Refers To Contact
DateCollected	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date the information about the indicator was collected.
EstimatedValue	Type currency Properties Create, Filter, Nillable, Sort, Update Description The estimated monetary value of the indicator.
Indicator	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The indicator, such as donation history, net worth, volunteer hours, or inheritance. Possible values are: • Donation History • Inheritance • Net Worth • Volunteer Hours
IndicatorType	Type picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update Description The type of indicator, such as engagement, wealth, philanthropy, communication, volunteerism, or media mention. Possible values are: • Communication • Engagement • Media Mention • Philanthropy • Volunteerism • Wealth
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view. If this value is null, the user might have only accessed this record or list view (LastReferencedDate) but not viewed it.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description An auto-generated string or number assigned to the party philanthropic indicator.
OtherSource	Type string Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description An indicator source that isn't a Salesforce object.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The user who owns this record. This field is a polymorphic relationship field. Relationship Name Owner Refers To Group, User
ParticipantId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The person involved in collecting the research. This field is a relationship field. Relationship Name Participant Refers To Contact
PartyPhilanthropicOccurrenceId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The prospect research event associated with the indicator. This field is a relationship field. Relationship Name PartyPhilanthropicOccurrence Refers To PartyPhilanthropicOccurrence
PartyPhilanthropicRsrchPrflId	Type reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update Description The research profile associated with the indicator. This field is a relationship field. Relationship Name PartyPhilanthropicRsrchPrfl Relationship Type Lookup Refers To PartyPhilanthropicRsrchPrfl
RelatedOrganizationId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The organization involved in collecting the research. This field is a relationship field. Relationship Name RelatedOrganization Refers To Account
ResearchEndDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The end date of the research, used to measure the research period and assess the efficiency of the research.
ResearchHours	Type double Properties Create, Filter, Nillable, Sort, Update Description The total hours spent researching the indicator, used to track resource allocation and time spent on researching each prospect.

Field	Details
ResearchSharedDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date when the completed research is shared with the relationship officer, used to ensure transparency and track the flow of information in prospect engagement.
ResearchStartDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The start date of the research, used to create a timeline for the research process and track the duration of the research phase.
SourceId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The business milestone, life event, or interaction summary associated with the indicator. This field is a polymorphic relationship field. Relationship Name Source Refers To BusinessMilestone, InteractionSummary, PersonLifeEvent
SourceType	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The type of source, such as external interaction, internal data, third-party data, or public records. Possible values are: • External Interaction • Internal Data • Public Records • Third-Party Data

Field	Details
Status	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The status of the prospect research indicator, if it hasn't been verified as a party philanthropic occurrence. Possible values are: • Promoted
Summary	Type textarea Properties Create, Nillable, Update Description A summary of the indicator.

Associated Objects

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

PartyPhilanthropicIndicatorHistory on page 736

History is available for tracked fields of the object.

PartyPhilanthropicIndicatorOwnerSharingRule on page 734

Sharing rules are available for the object.

PartyPhilanthropicIndicatorShare on page 733

Sharing is available for the object.

PartyPhilanthropicMilestone

Represents philanthropic activities and financial status for a period of time. This object is available in API version 63.0 and later.

Supported Calls

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

Fields

Field	Details
AccountId	Type reference Properties Create, Filter, Group, Sort, Update Description The account associated with the milestone. This field is a relationship field. Relationship Name Account Refers To Account
AssetLiquidationValue	Type currency Properties Create, Filter, Nillable, Sort, Update Description The value of the party's assets that can be liquidated within a specified time period.
BusinessOwnershipValue	Type currency Properties Create, Filter, Nillable, Sort, Update Description FIXME: Add the description here. [Writers: - The following description was added by the developer when they created this field. - It may nor may not be correct, complete, or up to date. - It is visible to customers in Setup > Object Manager in the UI. If you need to change what is visible there, ask the developer to change it.] The value of private businesses owned by the party.
ContactId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The contact associated with the milestone. This field is a relationship field. Relationship Name Contact

Field	Details
	Refers To Contact
Date	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date of the milestone.
ExtendedSummary	Type textarea Properties Create, Nillable, Update Description A detailed summary of the milestone.
GivingLevel	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The party's giving level. Possible values are: • \$1,000,000–\$4,999,999 • \$1,000–\$2,499 • \$10,000,000–\$24,999,999 • \$10,000–\$24,999 • \$100,000–\$249,999 • \$100–\$499 • \$2,500–\$4,999 • \$25,000,000+ • \$25,000–\$49,999 • \$250,000–\$999,999 • \$5,000,000–\$9,999,999 • \$5,000–\$9,999 • \$50,000–\$99,999 • \$500–\$999 • Under \$100

Field	Details
GraduationCohort	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The person's graduation cohort. Possible values are: • 0-5 Years Since Graduation • 11-20 Years Since Graduation • 21-30 Years Since Graduation • 31-40 Years Since Graduation • 41-50 Years Since Graduation • 50+ Years Since Graduation • 6-10 Years Since Graduation
GraduationStatus	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The person's graduation status. Possible values are: • Associate Degree • Certificate or Award • Multiple Degrees • Non-Graduate • Other • Postgraduate Degree • Secondary Diploma • Undergraduate Degree
Income	Type currency Properties Create, Filter, Nillable, Sort, Update Description The party's annual income.

Field	Details
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view. If this value is null, the user might have only accessed this record or list view (LastReferencedDate) but not viewed it.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description An auto-generated string or number assigned to the milestone.
OtherAssetsValue	Type currency Properties Create, Filter, Nillable, Sort, Update Description The value of the party's assets not covered by other measures of net worth.
OtherNonprofitGiftAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The monetary value of the party's donations to other nonprofits.
OtherNonprofitGiftCount	Type int Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The number of the party's donations to other nonprofits.
OverallRating	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The overall rating of the milestone. Possible values are: - High - Low - Medium
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The user who owns this record. This field is a polymorphic relationship field. Relationship Name Owner Refers To Group, User
PtyPhilanthropicAsmtCnt	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The number of party philanthropic assessments within the milestone period.
PtyPhilanthropicIndCnt	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The number of party philanthropic indicators within the milestone period.

Field	Details
PtyPhilanthropicOccrCnt	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The number of party philanthropic occurrences within the milestone period.
RealEstateValue	Type currency Properties Create, Filter, Nillable, Sort, Update Description The value of real estate owned by the party.
ResponsiblePersonId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The relationship officer assigned to the assessed party at the time the assessment milestone is generated. This field is a relationship field. Relationship Name ResponsiblePerson Refers To User
RetirementSavingsAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The party's retirement savings.
ShortSummary	Type textarea Properties Create, Filter, Nillable, Sort, Update Description A short summary of the milestone.

Field	Details
StockValue	Type currency Properties Create, Filter, Nillable, Sort, Update Description The value of public stock owned by the party.
StrengthsAndOpportunities	Type textarea Properties Create, Nillable, Update Description The strengths and opportunities identified in the milestone.
WeaknessesAndDrawbacks	Type textarea Properties Create, Nillable, Update Description The weaknesses and drawbacks identified in the milestone.
WealthAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The party's total wealth for the milestone.

Associated Objects

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

[PartyPhilanthropicMilestoneHistory](#) on page 736

History is available for tracked fields of the object.

[PartyPhilanthropicMilestoneOwnerSharingRule](#) on page 734

Sharing rules are available for the object.

[PartyPhilanthropicMilestoneShare](#) on page 733

Sharing is available for the object.

PartyPhilanthropicOccurrence

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

Supported Calls

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

Fields

Field	Details
AccountId	Type reference Properties Create, Filter, Group, Sort, Update Description The account associated with the occurrence. This field is a relationship field. Relationship Name Account Refers To Account
AttributedUserId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The user the research is attributed to. This field is a relationship field. Relationship Name AttributedUser Refers To User
CaseId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The case that delivers the research.

Field	Details
	This field is a relationship field. Relationship Name Case Relationship Type Lookup Refers To Case
ContactId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The contact associated with the occurrence. This field is a relationship field. Relationship Name Contact Refers To Contact
DateCollected	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date the information about the occurrence was collected.
EstimatedValue	Type currency Properties Create, Filter, Nillable, Sort, Update Description The estimated monetary value of the occurrence.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.

Field	Details
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view. If this value is null, the user might have only accessed this record or list view (<code>LastReferencedDate</code>) but not viewed it.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description An auto-generated string or number assigned to the party philanthropic occurrence.
OccurrenceType	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The type of occurrence, such as donation history, net worth, volunteer hours, or inheritance. Possible values are: • Donation History • Inheritance • Net Worth • Volunteer Hours
OtherSource	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description An occurrence source that isn't a Salesforce record.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The user who owns this record.

Field	Details
	This field is a polymorphic relationship field. Relationship Name Owner Refers To Group, User
ParticipantId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The participant contact involved in collecting the research. This field is a relationship field. Relationship Name Participant Refers To Contact
PartyPhilanthropicAssessmentId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The party philanthropic assessment associated with the occurrence. This field is a relationship field. Relationship Name PartyPhilanthropicAssessment Refers To PartyPhilanthropicAssessment
PartyPhilanthropicRsrchPrflId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The research profile associated with the occurrence. This field is a relationship field. Relationship Name PartyPhilanthropicRsrchPrfl Relationship Type Lookup

Field	Details
	Refers To PartyPhilanthropicRsrchPrfl
RelatedOrganizationId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The account of the organization that provided the occurrence. This field is a relationship field. Relationship Name RelatedOrganization Refers To Account
ResearchEndDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The end date of the research, used to measure the duration of the research period and assess the efficiency of the research.
ResearchHours	Type double Properties Create, Filter, Nillable, Sort, Update Description The total hours spent researching the occurrence, used to track resource allocation and time spent on researching each prospect.
ResearchSharedDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date when the completed research is shared with the relationship officer, used to ensure transparency and track the flow of information in prospect engagement.
ResearchStartDate	Type date

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update Description The start date of the research, used to create a timeline for the research process and track the duration of the research phase.
ResearchType	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The classification of research for the occurrence. Possible values are: • Communication • Engagement • Media Mention • Philanthropy • Volunteerism • Wealth
SourceId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The business milestone, life event, or interaction summary associated wiith the occurrence. This field is a polymorphic relationship field. Relationship Name Source Refers To BusinessMilestone, InteractionSummary, PersonLifeEvent
SourceType	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The type of source, such as external interaction, internal data, third-party data, or public records. Possible values are:

Field	Details
	• External Interaction • Internal Data • Public Records • Third-Party Data
Summary	Type textarea Properties Create, Nillable, Update Description A description of the occurrence.
VerificationType	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies whether the occurrence is known or inferred. Possible values are: • Inferred • Known

Associated Objects

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

[PartyPhilanthropicOccurrenceHistory](#) on page 736

History is available for tracked fields of the object.

[PartyPhilanthropicOccurrenceOwnerSharingRule](#) on page 734

Sharing rules are available for the object.

[PartyPhilanthropicOccurrenceShare](#) on page 733

Sharing is available for the object.

PartyPhilanthropicRsrchPrfl

Captures information associated with a contact or an organization in a many-to-one relationship. Serves as a pivot point for research on the person or organization. This object is available in API version 64.0 and later.

Supported Calls

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

Special Access Rules

This object is available only if the Fundraising Access license is enabled and the Fundraising User system permission is assigned to users.

Fields

Field	Details
AccountId	Type reference Properties Create, Filter, Group, Sort, Update Description The account ID associated with the research profile. This field is a relationship field. Relationship Name Account Refers To Account
CaseId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The case associated with the research profile. This field is a relationship field. Relationship Name Case Refers To Case
ContactId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The contact ID associated with the research profile. This field is a relationship field.

Field	Details
	Relationship Name Contact
	Refers To Contact
DetailedSummary	Type textarea
	Properties Create, Nillable, Update
	Description A comprehensive summary of the research findings for the profile.
EndDate	Type date
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The end date of the research stage, used to measure the duration of the research period and assess the efficiency of the research.
HoursSpentOnResearch	Type double
	Properties Create, Filter, Nillable, Sort, Update
	Description The total hours spent on the stage, used for resource allocation and performance tracking.
IsResearchCompleted	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether the research profile is complete (true) or not (false). The default value is <code>false</code> .
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort
	Description

Field	Details
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description The ID of the research profile record.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description This field is a polymorphic relationship field. Relationship Name Owner Refers To Group, User
PctOfResearchCompleted	Type percent Properties Create, Filter, Nillable, Sort, Update Description The percentage of completion for the research profile stage.
ResearchProfilePhase	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The research stage of the research profile. Possible values are: • Cultivation Strategy Development • Disqualification

Field	Details
	• Identification • Initial Screening • Ongoing Monitoring • Planning • Prioritization • Qualification • Rating and Segmentation • Research Deep Dive • Robust Research Completed
ResearchProfileType	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The type of research profile. Possible values are: • Capital Campaign • Planned Giving
ResearcherAssignedId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The team member responsible for completing the research stage, ensuring accountability and tracking workload across researchers. This field is a relationship field. Relationship Name ResearcherAssigned Refers To User
ShortSummary	Type textarea Properties Create, Filter, Nillable, Sort, Update Description A brief summary of the research findings for the profile.

Field	Details
StartDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The start date of the research stage, used to track the duration of the stage and create a timeline for the research process.

Associated Objects

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

PartyPhilanthropicRsrchPrflHistory on page 736

History is available for tracked fields of the object.

PartyPhilanthropicRsrchPrflOwnerSharingRule on page 734

Sharing rules are available for the object.

PartyPhilanthropicRsrchPrflShare on page 733

Sharing is available for the object.

PaymentInstrument

Represents the details related to the Payment Instrument used to complete the transaction. 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

This object is available only if the Fundraising Access license is enabled and the Fundraising User system permission is assigned to users

Fields

Field	Details
AccountHolderName	Type string Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Name of the Payment Instrument Holder.
AccountId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The Account or PersonAccount that is using the payment instrument. This field is a relationship field. Relationship Name Account Relationship Type Lookup Refers To Account
BankAccountHolderType	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description Determines if the bank account holder is an individual or a company.
BankAccountNumber	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The bank account number used for payment.
BankAccountType	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description Type of the Bank Account.
BankCode	Type string

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update Description Code of bank associated with the bank account.
BankName	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description Name of bank associated with the bank account.
CardBrand	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The credit card brand, network, or issuer.
CurrencyIsoCode	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The currency ISO code. This field is hidden when multicurrency is off. Possible values are: • AUD—Australian Dollar • GBP—British Pound • USD—U.S. Dollar The default value is USD.
DigitalWalletProvider	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The provider of the digital wallet.
ExpiryMonth	Type string

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update Description Expire month if payment method is credit card.
ExpiryYear	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description Expire year if payment method is credit card.
GatewayName	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The name of the payment gateway.
GatewayReference	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description A reference number from the gateway for this payment instrument.
Last4	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description Last 4 digits of payment method.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type dateTime

Field	Details
	Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed this record.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description The unique, auto-numbered name of the payment instrument.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description This field is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
PaymentProcessorName	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The name of the payment processor.
ProcessorReference	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The reference of the payment processor associated with the payment instrument.
Type	Type picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Specifies the type of the payment instrument. Possible values are: • ACH • BACS Debit • BECS Debit • Bancontact • Credit Card • PayPal • SEPA Direct Debit • Venmo • iDEAL

Associated Objects

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

PaymentInstrumentFeed

Feed tracking is available for the object.

PaymentInstrumentHistory

History is available for tracked fields of the object.

PaymentInstrumentShare

Sharing is available for the object.

PlannedGift

A complex gift such as an annuity, bequest, or trust. This object is available in API version 64.0 and later.

Supported Calls

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

Special Access Rules

This object is available only if the Fundraising Access license is enabled and the Fundraising User system permission is assigned to users.

Fields

Field	Details
ActuarialFactor	Type double Properties Create, Filter, Nillable, Sort, Update Description A factor based on actuarial assumptions that's used to calculate the gift's future value.
AmountReceived	Type currency Properties Create, Filter, Nillable, Sort, Update Description The amount received since the planned gift record was created.
BequestRealizationDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The expected date when a bequest is likely to be realized.
CaseId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The case associated with the planned gift. This field is a relationship field. Relationship Name Case Refers To Case
ContactId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The contact for the planned gift.

Field	Details
	This field is a relationship field. Relationship Name Contact Refers To Contact
CurrentValue	Type currency Properties Create, Filter, Nillable, Sort, Update Description The planned gift's current value.
DateCommitted	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date when the gift was committed.
DateReceived	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date when the gift was received.
DeferralPeriod	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The time period, in years, after which payments start.
DeferredFutureValue	Type currency Properties Create, Filter, Nillable, Sort, Update Description The projected value of a deferred gift annuity at maturity.

Field	Details
DiscountRate	Type percent Properties Create, Filter, Nillable, Sort, Update Description The discount rate applied to project the future value of the gift.
DonorGiftConceptId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The gift concept associated with the planned gift. This field is a relationship field. Relationship Name DonorGiftConcept Refers To DonorGiftConcept
DonorId	Type reference Properties Create, Filter, Group, Sort, Update Description The donor of the planned gift. This field is a relationship field. Relationship Name Donor Refers To Account
Expectancy	Type double Properties Create, Filter, Nillable, Sort, Update Description The expected number of years to maturity, based on actuarial assumptions.
ExpectedAmount	Type currency

Field	Details
	Properties Create, Filter, Nillable, Sort, Update Description The expected value of the planned gift.
ExpectedEstateValue	Type currency Properties Create, Filter, Nillable, Sort, Update Description The total estimated value of a donor's estate.
ExpensesAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The total management expenses associated with the gift.
FaceValue	Type currency Properties Create, Filter, Nillable, Sort, Update Description The face value of the gift, if the gift is life insurance.
FirstPaymentDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date when the first payment is made, if the gift is a trust or an annuity.
FutureValue	Type currency Properties Create, Filter, Nillable, Sort, Update Description The gift's projected value at maturity.
GiftAgreementId	Type reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update Description The gift agreement associated with the planned gift. This field is a relationship field. Relationship Name GiftAgreement Refers To GiftAgreement
GiftType	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The type of planned gift. Possible values are: • Bequest • Bequest Specific Amount • Bequest Specific Percentage • Charitable Gift Annuity • Charitable Lead Annuity Trust • Charitable Remainder Annuity Trust • Charitable Remainder Trust • Charitable Remainder Unitrust • Deferred Gift Annuity • Donor Advised Fund • Immediate Gift Annuity • Life Insurance • Life Insurance Irrevocable Interest • Other Planned Gift • Personal Property • Pooled Income Fund • Real Estate • Securities
InvestmentReturnRate	Type percent

Field	Details
	Properties Create, Filter, Nillable, Sort, Update Description The return rate on investments related to the gift.
IsRevocable	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the gift is revocable (true) or not (false). The default value is <code>false</code> .
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description
LastValuationDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date when the planned gift value was last updated.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description
MarketValue	Type currency Properties Create, Filter, Nillable, Sort, Update Description The gift's current market value.
MaturityDate	Type date

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update Description The date when the gift is expected to mature or be realized.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description The ID of the planned gift record.
NetReturnRate	Type percent Properties Create, Filter, Nillable, Sort, Update Description The expected annual net return rate on the gift's investments.
NetValue	Type currency Properties Create, Filter, Nillable, Sort, Update Description The net value of the gift after expenses and payouts.
OpportunityId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The opportunity associated with the planned gift. This field is a relationship field. Relationship Name Opportunity Refers To Opportunity
OwnerId	Type reference

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update Description This field is a polymorphic relationship field. Relationship Name Owner Refers To Group, User
PayoutFrequency	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The payment frequency. Possible values are: • Annual • Custom • Monthly • One-Time • Quarterly • Semi-Annual
PayoutRate	Type percent Properties Create, Filter, Nillable, Sort, Update Description The rate at which payouts are made to beneficiaries.
PolicyNumber	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The policy number, if the gift is life insurance.
PremiumAmount	Type currency

Field	Details
	Properties Create, Filter, Nillable, Sort, Update Description The premium amount, if the gift is life insurance.
PresentValue	Type currency Properties Create, Filter, Nillable, Sort, Update Description A calculated value of future cash flows associated with an asset or planned gift.
PrincipalAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The principal amount of the gift.
PrincipalPercentage	Type percent Properties Create, Filter, Nillable, Sort, Update Description The percentage of the expected amount that's the principal amount of the gift.
ProbabilityFactor	Type percent Properties Create, Filter, Nillable, Sort, Update Description The probability of receiving the gift.
ResiduaryShare	Type percent Properties Create, Filter, Nillable, Sort, Update Description The percentage of the estate allocated to the institution for residuary bequests.
StartDate	Type date

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update Description The date when the gift agreement is initiated.
Status	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The status of the planned gift. Possible values are: • Active • Closed • In Probate • Inactive • Matured • Pending Approval • Realized • Under Agreement
Term	Type double Properties Create, Filter, Nillable, Sort, Update Description The term of a trust for calculating future and present value.
TermEndDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date when the gift matures or the trust term ends.
TermType	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The term type for the trust, such as fixed number of years, one life, or two lives. Possible values are: • Fixed Number of Years • Joint Life • Life of Beneficiary • Life of Donor • One Life Fixed Term • Single Life • Two Lives Fixed Term
TrustName	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The name of the trust, if the gift is categorized as a trust.
TrustType	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The type of trust. Possible values are: • Charitable Lead Annuity Trust • Charitable Lead Unitrust • Charitable Remainder Annuity Trust • Charitable Remainder Trust • Charitable Remainder Unitrust • Irrevocable Trust • Revocable Trust • Testamentary Trust
TrusteeFees	Type currency Properties Create, Filter, Nillable, Sort, Update

Field	Details
	Description Fees paid to the trustee.
UnitsHeld	Type double Properties Create, Filter, Nillable, Sort, Update Description The number of units that the donor holds in the pooled income fund.
UnitsValue	Type currency Properties Create, Filter, Nillable, Sort, Update Description The value of 1 unit in the pooled income fund.

Associated Objects

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

PlannedGiftChangeEvent

Change events are available for the object.

PlannedGiftFeed

Feed tracking is available for the object.

PlannedGiftHistory

History is available for tracked fields of the object.

PlannedGiftOwnerSharingRule

Sharing rules are available for the object.

PlannedGiftShare

Sharing is available for the object.

PlannedGiftAnnuityRate

The rate used to calculate payments for a charitable gift annuity. This object is available in API version 64.0 and later.

Supported Calls

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

Special Access Rules

This object is available only if the Fundraising Access license is enabled and the Fundraising User system permission is assigned to users.

Fields

Field	Details
EffectiveDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date the annuity rate becomes effective.
GiftType	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The gift type associated with the gift annuity. Determines the payout rate for the gift. Possible values are: • Bequest • Charitable Gift Annuity • Charitable Lead Annuity Trust • Charitable Remainder Annuity Trust • Charitable Remainder Trust • Deferred Gift Annuity • Donor Advised Fund • Life Insurance • Other Planned Gift • Personal Property • Pooled Income Fund • Real Estate • Securities
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description

Field	Details
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description
MaturityDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date when the annuity payments end.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description The ID of the gift annuity rate record.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description This field is a polymorphic relationship field. Relationship Name Owner Refers To Group, User
PlannedGiftId	Type reference Properties Create, Filter, Group, Sort, Update Description The planned gift associated with the gift annuity rate. This field is a relationship field. Relationship Name PlannedGift

Field	Details
	Refers To PlannedGift
Rate	Type percent Properties Create, Filter, Sort, Update Description The annuity rate used to calculate payments to the donor or beneficiary.
StartDate	Type date Properties Create, Filter, Group, Sort, Update Description The date when the annuity payments begin.

Associated Objects

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

[PlannedGiftAnnuityRateChangeEvent](#)

Change events are available for the object.

[PlannedGiftAnnuityRateFeed](#)

Feed tracking is available for the object.

[PlannedGiftAnnuityRateHistory](#)

History is available for tracked fields of the object.

[PlannedGiftAnnuityRateOwnerSharingRule](#)

Sharing rules are available for the object.

[PlannedGiftAnnuityRateShare](#)

Sharing is available for the object.

PlannedGiftPerformance

The performance of a planned gift over time, including returns, expenses, and net value. This object is available in API version 64.0 and later.

Supported Calls

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

Special Access Rules

This object is available only if the Fundraising Access license is enabled and the Fundraising User system permission is assigned to users.

Fields

Field	Details
Expenses	Type currency Properties Create, Filter, Nillable, Sort, Update Description The total management expense associated with the planned gift.
InvestmentReturnRate	Type percent Properties Create, Filter, Nillable, Sort, Update Description The investment return rate associated with the planned gift.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description The ID of the gift performance record.
NetValue	Type currency

Field	Details
	Properties Create, Filter, Nillable, Sort, Update Description The value of the planned gift after accounting for expenses and payouts.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description This field is a polymorphic relationship field. Relationship Name Owner Refers To Group, User
PayoutRate	Type percent Properties Create, Filter, Nillable, Sort, Update Description The rate at which payouts are made to beneficiaries of the planned gift.
PayoutStartDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The start date of payouts to beneficiaries from the planned gift.
PlannedGiftId	Type reference Properties Create, Filter, Group, Sort, Update Description The planned gift associated with the performance record. This field is a relationship field. Relationship Name PlannedGift Refers To PlannedGift

Field	Details
StartDate	Type date Properties Create, Filter, Group, Sort, Update Description The start date of performance tracking for the planned gift.

Associated Objects

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

[PlannedGiftPerformanceChangeEvent](#)

Change events are available for the object.

[PlannedGiftPerformanceFeed](#)

Feed tracking is available for the object.

[PlannedGiftPerformanceHistory](#)

History is available for tracked fields of the object.

[PlannedGiftPerformanceOwnerSharingRule](#)

Sharing rules are available for the object.

[PlannedGiftPerformanceShare](#)

Sharing is available for the object.

Fundraising Fields on Other Objects

Fundraising includes fields that are available on other Salesforce objects. These fields are available only in orgs with Nonprofit Cloud or Education Cloud when Fundraising is enabled.

[ContactPointAddress](#)

Represents a contact's billing or shipping address, which is associated with an individual or a person account. This object is available in API version 61.0 and later.

[ContactProfile](#)

Represents information about an individual, such as their ethnicity, citizenship, birth place, race, and so on. The Fundraising fields on this object are available in API version 59.0 and later.

[ListEmail](#)

Represents a list email sent from Salesforce, or sent from Account Engagement and synced to Salesforce. When the list email is sent, the recipients are generated by combining recipients in the ListEmailIndividualRecipients and ListEmailRecipientSource objects. Duplicate and other invalid recipients are removed. The result is the recipients are sent any given list email. ListEmail has a one-to-many relationship with ListEmailRecipientSource and ListEmailIndividualRecipient objects. This object is available in API version 61.0 and later.

ContactPointAddress

Represents a contact's billing or shipping address, which is associated with an individual or a person account. This object is available in API version 61.0 and later.



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

Supported Calls

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

Special Access Rules

This object is available only if the FundraisingAccess license is enabled and the Fundraising User system permission is assigned to users.

Fields

Field	Details
ActiveFromDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date when the contact's address became active.
ActiveToDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date when the contact's address is no longer active.
Address	Type address Properties Filter, Nillable Description The full address.
AddressType	Type picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update Description The type of address. Valid values are: - Billing - Shipping
BestTimeToContactEndTime	Type time Properties Create, Filter, Nillable, Sort, Update Description The latest time to contact the individual.
BestTimeToContactStartTime	Type time Properties Create, Filter, Nillable, Sort, Update Description The earliest time to contact the individual.
BestTimeToContactTimezone	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The timezone applied to the best time to contact the individual.
City	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The address city.
ContactPointPhoneId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The primary phone number associated with this address. This field is a relationship field. Relationship Name ContactPointPhone Relationship Type Lookup Refers To ContactPointPhone
Country	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The address country.
GeocodeAccuracy	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The level of accuracy of a location's geographical coordinates compared with its physical address. A geocoding service typically provides this value based on the address's latitude and longitude coordinates. Valid values are: • Address • Block • City • County • ExtendedZip • NearAddress • Neighborhood • State • Street • Unknown • Zip
IsDefault	Type boolean

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether a contact's address is the preferred method of communication (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.
IsPrimary	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether a contact's address is their primary address (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.
IsThirdPartyAddress	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the address is associated with a third party (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.
IsUndeliverable	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the address is undeliverable (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.
LastAddressStdDate	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The most recent date and time that the address was evaluated by the address standardization provider.
LastAddressStdStatus	Type string

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update Description The most recent status received from the address standardization provider.
LastChangeOfAddressDate	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The most recent date and time that the address was evaluated by the change of address provider.
LastChangeOfAddressStatus	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The status of the latest change of address request.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last referenced a record related to this record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (<code>LastReferencedDate</code>) and not viewed.
Latitude	Type double Properties Create, Filter, Nillable, Sort, Update Description Used with <code>Longitude</code> to specify the precise geolocation of the address. Acceptable values are numbers between -90 and 90 with up to 15 decimal places.

Field	Details
Longitude	Type double Properties Create, Filter, Nillable, Sort, Update Description Used with <code>Latitude</code> to specify the precise geolocation of the address. Acceptable values are numbers between –180 and 180 with up to 15 decimal places.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description Required. The name of the contact point address record.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The ID of the account's owner associated with this contact. This field is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
ParentId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The ID of the contact's parent record. Only an individual or account can be a contact's parent. This field is a polymorphic relationship field. Relationship Name Parent Relationship Type Master-detail

Field	Details
	Refers To Account, Individual (the master object)
PostalCode	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The address postal code.
PreferenceRank	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The preference rank when there are multiple contact point addresses.
SeasonalEndDay	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The day when the seasonal address of the contact is replaced by the default address. Valid values are: 1–31
SeasonalEndMonth	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The month when the seasonal address of the contact is replaced by the default address. Valid values are: 1–12
SeasonalStartDay	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The day when the seasonal address of the contact replaces the default address. Valid values are: 1–31

Field	Details
SeasonalStartMonth	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The month when the seasonal address of the contact replaces the default address. Valid values are: 1–12
State	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The address state.
Street	Type textarea Properties Create, Filter, Group, Nillable, Sort, Update Description The address street.
UsageType	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The usage type of this address. For instance, whether it's a work address or a home address. Valid values are: • Home • Inactive • Temporary • Work

ContactProfile

Represents information about an individual, such as their ethnicity, citizenship, birth place, race, and so on. The Fundraising fields on this object are available in API version 59.0 and later.

Supported Calls

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

Fields

Field	Details
AssetLiquidationValue	Type currency Properties Create, Filter, Nillable, Sort, Update Description The value of assets that can be liquidated within 90 days.
BusinessOwnershipValue	Type currency Properties Create, Filter, Nillable, Sort, Update Description The value of private businesses the contact owns.
Income	Type currency Properties Create, Filter, Nillable, Sort, Update Description The annual income amount of the contact.
Location	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The location where the contact currently resides.
OtherAssetsValue	Type currency Properties Create, Filter, Nillable, Sort, Update Description The value of the contact's assets that aren't covered by other ways of measuring net worth.

Field	Details
OtherNonprofitGiftAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The amount of donations the contact has given to other nonprofits.
OtherNonprofitGiftCount	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The number of donations the contact has given to other nonprofits.
RealEstateValue	Type currency Properties Create, Filter, Nillable, Sort, Update Description The value of real estate the contact owns.
RecurringDonorType	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the type of recurring donor. Possible values are: • Active • Former • Lapsed
RetirementSavingsAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The amount of the contact's retirement savings.
StockValue	Type currency

Field	Details
	Properties Create, Filter, Nillable, Sort, Update Description The value of public stock the contact owns.
Website	Type url Properties Create, Filter, Nillable, Sort, Update Description A website that's associated with the contact.

For more information, see [ContactProfile in Education Cloud](#).

ListEmail

Represents a list email sent from Salesforce, or sent from Account Engagement and synced to Salesforce. When the list email is sent, the recipients are generated by combining recipients in the ListEmailIndividualRecipients and ListEmailRecipientSource objects. Duplicate and other invalid recipients are removed. The result is the recipients are sent any given list email. ListEmail has a one-to-many relationship with ListEmailRecipientSource and ListEmailIndividualRecipient objects. This object is available in API version 61.0 and later.

Supported Calls

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

Special Access Rules

This object is available to Marketing Cloud users with the FundraisingAccess permission set on Marketing Cloud Growth Edition campaigns.

Fields

Field	Details
CampaignId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The ID of the related campaign. This field is a relationship field.

Field	Details
	Relationship Name Campaign
	Relationship Type Lookup
	Refers To Campaign
FromAddress	Type textarea
	Properties Create, Filter, Update
	Description Read-only except when the list email is in a draft state. Validated against user's addresses.
FromName	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Read-only except when the list email is in a draft state. Validated against user's addresses. This field is null for emails sent from Account Engagement.
HasAttachment	Type boolean
	Properties Defaulted on create, Filter, Group, Sort
	Description Read-only. Defaulted on create and update. Indicates if the list email has an attachment (<code>true</code>) or not (<code>false</code>). This field is null for emails sent from Account Engagement. The default value is <code>false</code> .
HtmlBody	Type textarea
	Properties Create, Nillable, Update
	Description The body of the list email. This field is null for emails sent from Account Engagement. List emails can contain up to 32,000 characters for the body. These limits include visible characters and other characters in the email, including markup.

Field	Details
IsOutreachSourceCodeEnabled	Type boolean Properties Defaulted on create, Filter, Group, Sort Description Indicates whether outreach source code can be added to this record (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>. This field is a calculated field.
IsTracked	Type boolean Properties Defaulted on create, Filter, Group, Sort Description Indicates if email tracking was on when the list email was sent (<code>true</code>) or not (<code>false</code>). This field is blank for emails sent from Account Engagement and synced to Salesforce. This field is null for emails sent from Account Engagement. The default value is <code>false</code>.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> isn't null, the user accessed this record or list view indirectly.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description Read-only except when the list email is in a draft state.

Field	Details
OutreachSourceCodeId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The outreach source code associated with the gift transaction. This field is a relationship field. Relationship Name OutreachSourceCode Relationship Type Lookup Refers To OutreachSourceCode
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The ID of the owner of this object. This field is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
ScheduledDate	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description Read-only. If null and <code>Status</code> is set to <code>Scheduled</code>, then defaults to created time.
Status	Type picklist Properties Create, Filter, Group, Restricted picklist, Sort, Update Description Read-only except when the list email is in a draft state.

Field	Details
	Changing the status to <code>Scheduled</code> causes the list email to be sent. Valid values are: • <code>Cancelled</code> • <code>Draft</code> • <code>LimitError</code> • <code>Running</code> • <code>Scheduled</code> • <code>Sent</code>
Subject	Type textarea Properties Create, Filter, Nillable, Update Description Read-only except when the list email is in a draft state. This field is null for emails sent from Account Engagement. List emails can contain up to 3,000 characters for the subject. These limits include visible characters and other characters in the email, including markup.
TextBody	Type textarea Properties Create, Nillable, Update Description Read-only except when the list email is in a draft state. This field is null for emails sent from Account Engagement.
TotalSent	Type int Properties Defaulted on create, Filter, Group, Nillable, Sort Description Read-only. The total number of list emails sent, including bounced, opted-out, and invalid To: addresses.

Associated Objects

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

ListEmailChangeEvent

Change events are available for the object.

ListEmailFeed

Feed tracking is available for the object.

ListEmailHistory

History is available for tracked fields of the object.

ListEmailOwnerSharingRule

Sharing rules are available for the object.

ListEmailShare

Sharing is available for the object.

Fundraising Business APIs

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

To use the Fundraising Business Process APIs:

- [Enable Fundraising](#) in your org.
- Enable donor matching method. See [Configure Fundraising Settings](#). See the [FundraisingConfig](#) object to know about the donor matching method details.
- Select a default gift designation. See [Gift Designation](#).
- Configure the duplicate and matching rules for the Account and Contact objects, Or set Duplicate Matching in Settings to **No Matching**. See [Customize Duplicate Management](#).

The Fundraising Business Process APIs help teams create strong integrations using industry-standard tools. Use the Salesforce composite Fundraising BP API to send a single complex payload instead of making multiple calls using multiple APIs to various objects.

Developer-friendly APIs don't require a detailed and complete understanding of the NPC data model, greatly simplifying integrations. These APIs offer scalability and flexibility through features like automatic record matching, batch processing, bulk operations, and dynamic data mapping. Five robust endpoints are currently available to:

- Create bulk gift transactions with related donor and designations
- Create bulk gift commitments with related donor, schedule, and default designations
- Modify the future recurring schedule on a gift commitment
- Apply payment update metadata to gift transactions and future gift commitment installments

The Fundraising Business Process APIs are available as a standard Salesforce Connect API REST endpoint as well as through Apex.

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

To use Business APIs on the Postman API platform, see the [Postman collection for Fundraising](#).

Resources

Learn more about the available Fundraising API resources.

Request Bodies

Learn more about the available Fundraising API request bodies.

Response Bodies

Learn more about the available Fundraising API response bodies.

Resources

Learn more about the available Fundraising API resources.

[Commitments \(POST\)](#)

Create recurring gift commitments and schedules, along with associated new or matched donor. Customize fields for donor accounts, gift commitments, and schedules.

[Commitments \(PATCH\)](#)

Modify the data for the schedule, campaign, outreach source code, donor, and payment instrument on an active gift commitment.

[Gift Transactions](#)

Get gift transactions associated with a gift commitment record.

[Gift Transaction Designations](#)

Get designations associated with a gift transaction, campaign, commitment, or opportunity.

[Gift Commitment Transactions](#)

Get a list of gift transactions associated with a gift commitment for a donor account.

[Gift Commitment Default Designations](#)

Get default designations associated with a gift commitment.

[Gift Campaign Default Designations](#)

Get default designations associated with a gift campaign.

[Gifts Transactions \(POST\)](#)

Create gift transactions with related new or matched donor, optional transaction designations, and payment-instrument metadata. This API supports custom fields for the donor account and gift transaction.

[Transactions Payment Updates \(POST\)](#)

Update the gateway and processor metadata for gift transactions. This API supports updating only the properties that are specified in the request body. If you include any other standard or custom fields in the request body beyond the specified properties, an error is shown.

[Commitments Payment Updates \(POST\)](#)

Update the metadata for your payment instruments for all active gift commitments.

Commitments (POST)

Create recurring gift commitments and schedules, along with associated new or matched donor. Customize fields for donor accounts, gift commitments, and schedules.

Resource

```
/connect/fundraising/commitments
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v66.0/connect/fundraising/commitments
```

Available version

60.0

HTTP methods

POST

Request body for POST

Note: You can pass the campaign, donor, and designation IDs in an `externalId` object containing `fieldName` and `fieldValue`.

JSON example

```
{
  "processingOptions": {
    "donorOptions": {
      "defaultUpdateLogic": "update_all"
    }
  },
  "commitments": [
    {
      "amount": 150.25,
      "type": "pledge",
      "currencyIsoCode": "USD",
      "transactionPeriod": "monthly",
      "transactionInterval": 3,
      "transactionDay": "5",
      "startDate": "2024-07-06",
      "endDate": "2024-07-06",
      "campaign": {
        "id": "701y0030d0zk6t06f4"
      },
      "outreachSourceCode": {
        "id": "0gx000d0d0d0FD",
        "sourceCode": "AnimalEmailCampaign2023"
      },
      "donor": {
        "donorType": "individual",
        "id": "0015500000W01ZxxAL",
        "organizationName": "mini cat town",
        "firstName": "Daniel",
        "lastName": "Chavez",
        "phone": "510-432-9876",
        "email": "d.chavez.com",
        "address": [
          {
            "street": "123 Main Street",
            "city": "Oakland",
            "state": "CA",
            "postalCode": "94610",
            "country": "US"
          }
        ],
        "accountCustomFields": [
          {
            "fieldName": "string",
            "fieldValue": "string"
          }
        ]
      },
      "paymentInstrument": {
```

```

    "type": "Credit Card",
    "accountHolderName": "Daniel Chavez",
    "expiryMonth": "10",
    "expiryYear": "2026",
    "last4": "4321",
    "cardBrand": "Diner's Club",
    "bankName": "chase",
    "digitalWalletProvider": "EwalletProvider",
    "bankAccountHolderType": "primary",
    "bankAccountType": "checking",
    "bankAccountNumber": "123456",
    "bankCode": "HBUK",
    "gatewayName": "Gateway",
    "processorName": "Centpro",
    "processorPaymentReference": "string",
    "gatewayReference": "string"
  },
  "designations": [
    {
      "designationId": "0gd0030f0303024",
      "percent": 10
    }
  ],
  "firstTransaction": {
    "amount": 150.25,
    "receivedDate": "2024-07-06",
    "donorCoverAmount": 0.25,
    "transactionStatus": "Unpaid",
    "gatewayTransactionFee": 0.75,
    "processorTransactionFee": 0.45,
    "processorReference": "cls-1247586928747",
    "gatewayReference": "102656693ac3ca6e0cdafbfe89ab99",
    "lastGatewayResponseCode": "invalid_cvc",
    "lastGatewayErrorMessage": "The card's security code is invalid. Check the
card's security code or use a different card.",
    "lastGatewayProcessedDateTime": "2023-07-06T21:57:51Z"
  },
  "giftCommitmentCustomFields": [
    {
      "fieldName": "string",
      "fieldValue": "string"
    }
  ],
  "giftCommitmentScheduleCustomFields": [
    {
      "fieldName": "string",
      "fieldValue": "string"
    }
  ],
  "giftTransactionCustomFields": [
    {
      "fieldName": "string",
      "fieldValue": "string"
    }
  ]
}

```

```
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
commitments	Create Commitment Request Input[]	Details of the request to create the commitment. Limited to 100 commitments in a single request.	Required	60.0
processing Options	Processing Options Details Input	Options for the donor matching process.	Optional	60.0

Response body for POST

[Create Commitment](#)

SEE ALSO:

[Nonprofit Cloud Developer Guide: Fundraising](#)

Commitments (PATCH)

Modify the data for the schedule, campaign, outreach source code, donor, and payment instrument on an active gift commitment.

Resource

```
/connect/fundraising/commitments/commitmentId
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v66.0/connect/fundraising/commitments/6gc0000AbCdZF9q
```

Available version

60.0

HTTP methods

PATCH

Request body for PATCH

 **Note:** You can pass the campaign, donor, and designation IDs in an `externalId` object containing `fieldName` and `fieldValue`.

JSON example

```
{
  "amount": 150.25,
  "type": "pledge",
  "transactionInterval": 3,
  "transactionDay": "5",
  "startDate": "2024-07-06",
}
```



```

"endDate": "2024-07-06",
"campaign": {
  "id": "701y0030d0zk6t06f4"
},
"outreachSourceCode": {
  "id": "0gx000d0d0d0FD",
  "sourceCode": "AnimalEmailCampaign2023"
},
"donor": {
  "donorType": "individual",
  "organizationName": "ABC Inc.",
  "firstName": "Daniel",
  "lastName": "Chavez",
  "phone": "510-434-8920",
  "email": "d.chavez@salesforce.com",
  "address": [
    {
      "street": "123 Main Street",
      "city": "Oakland",
      "state": "CA",
      "postalCode": "94610",
      "country": "US"
    }
  ],
  "accountCustomFields": [
    {
      "fieldName": "string",
      "fieldValue": "string"
    }
  ],
  "paymentInstrument": {
    "type": "Credit Card",
    "accountHolderName": "Daniel Chavez",
    "expiryMonth": "10",
    "expiryYear": "2026",
    "last4": "4321",
    "cardBrand": "Diner's Club",
    "bankName": "chase",
    "digitalWalletProvider": "EProvider",
    "bankAccountHolderType": "primary",
    "bankAccountType": "checking",
    "bankAccountNumber": "123456",
    "bankCode": "HBUK",
    "gatewayName": "Gateway",
    "processorName": "Centpro",
    "processorPaymentReference": "string",
    "gatewayReference": "string"
  },
  "giftCommitmentCustomFields": [
    {
      "fieldName": "string",
      "fieldValue": "string"
    }
  ],

```

```

    "giftCommitmentScheduleCustomFields": [
      {
        "fieldName": "string",
        "fieldValue": "string"
      }
    ]
  }
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
amount	Double	Gift amount of each transaction associated with the gift commitment schedule.	Required	60.0
campaign	Campaign Details	Campaign that's associated with the gift commitment.	Optional	60.0
currency IsoCode	String	Currency ISO code of the gift commitment.	Optional	60.0
donorId	Donor Details Input	Person, household, or organization account associated with the commitment.	Optional	60.0
endDate	String	End date of the new schedule for this gift commitment. The format is YYYY-MM-DD.	Optional	60.0
giftCommitment CustomFields	Custom Field Details[]	Custom fields of the gift commitment.	Optional	60.0
giftCommitment Schedule CustomFields	Custom Field Details[]	Custom fields of the gift commitment schedule.	Optional	60.0
outreach SourceCode	Outreach Source Code Details	Outreach source code that's associated with the campaign for the gift commitment.	Optional	60.0
payment Instrument	Payment Instrument Details	Payment instrument that's used to complete the transaction.	Required	60.0
startDate	String	Start date of the new schedule for this gift commitment. The format is YYYY-MM-DD.	Required	60.0
transaction Day	String	Specifies the day of the month to create gift transactions in the future for a monthly transaction period. If you select the day as 29 or 30, the gift transaction	Optional	60.0

Name	Type	Description	Required or Optional	Available Version
		is created on the last day for the months that don't have that many days.		
transactionInterval	Integer	Transaction interval that's applicable to an incoming transaction in the commitment.	Optional	60.0
transactionPeriod	String	Transaction period that's applicable to the incoming transaction in the commitment. When <code>type</code> is <code>pledge</code> , this property must be set to <code>Custom</code> . If <code>transactionPeriod</code> is not provided, the default is <code>Custom</code> .	Required	60.0
type	String	Type of transaction. Possible values are: - Pledge - Recurring The default value is the <code>Recurring</code> .	Optional	62.0

Response body for PATCH

[Update Commitment](#) on page 282

SEE ALSO:

[Nonprofit Cloud Developer Guide: Fundraising](#)

Gift Transactions

Get gift transactions associated with a gift commitment record.

Resource

```
/connect/fundraising/gift-commitments/{commitmentId}/gift-transactions
```

Resource examples

```
https://yourInstance.salesforce.com/services/data/v66.0/connect/fundraising/gift-commitments/6gpx000004HUIAA0/gift-transactions
```

```
https://yourInstance.salesforce.com/services/data/v66.0/connect/fundraising/gift-commitments/6gpx000004HUIAA0/gift-transactions?out=2&periodRet=Status=Canceled,Failed
```

```
https://yourInstance.salesforce.com/services/data/v66.0/connect/fundraising/gift-commitments/6gpx000004HUIAA0/gift-transactions?out=2&periodRet=StartDate=2023-02-17T13:05:23.00Z
```

Available version

59.0

HTTP methods

GET

Query parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
count	Integer	Number of gift transactions to be retrieved. You can get a maximum of 12 transactions in one request. By default, the API returns 12 transactions.	Optional	59.0
fromDate	String	Date (yyyy-MM-dd'T'HH:mm:ss.SSSX) from when you want to get the transactions. This field is not applicable if period is Recent.	Optional	59.0
period	String	Period for getting gift transactions. possible values are: • Future • Past • Recent The default period is Future.	Optional	59.0
status	String[]	Comma-separated list of gift-transactions statuses. Possible values are: • Canceled • Failed • Fully Refunded • Paid • Unpaid • Written-Off The default status is Unpaid.	Optional	59.0

Response body for GET

[Gift Transactions Output](#)

Gift Transaction Designations

Get designations associated with a gift transaction, campaign, commitment, or opportunity.



Note: When there are no designations associated with a gift transaction, campaign, commitment, or opportunity, the API returns the organization-wide default designations.

Resource

```
/connect/fundraising/transaction/${transactionId}/designations
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v66.0/connect/fundraising/transaction/6trRM000000007XVZQ/designations
```

Available version

59.0

HTTP methods

GET

Response body for GET[Gift Transaction Linked Designations Output](#)

Gift Commitment Transactions

Get a list of gift transactions associated with a gift commitment for a donor account.

Resource

```
/connect/fundraising/donor/${donorId}/commitments
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v66.0/connect/fundraising/donor/001xx000003GYOpAAQ/commitments
```

Available version

59.0

HTTP methods

GET

Response body for GET[Gift Commitment Transaction Matching Output](#)

Gift Commitment Default Designations

Get default designations associated with a gift commitment.

Resource

```
/connect/fundraising/commitment/${commitmentId}/default-designations
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v66.0/connect/fundraising/commitment/6trRM000000007XVZQ/default-designations
```

Available version

59.0

HTTP methods

GET

Response body for GET[Gift Commitment Default Designations Output](#)

Gift Campaign Default Designations

Get default designations associated with a gift campaign.

Resource

```
/connect/fundraising/campaign/${campaignId}/default-designations
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v66.0/connect/fundraising/campaign/701FM000000FhntYAC/default-designations
```

Available version

59.0

HTTP methods

GET

Response body for GET[Gift Campaign Default Designations Output](#)

Gifts Transactions (POST)

Create gift transactions with related new or matched donor, optional transaction designations, and payment-instrument metadata. This API supports custom fields for the donor account and gift transaction.

Resource

```
/connect/fundraising/gifts
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v66.0/connect/fundraising/gifts
```

Available version

60.0

HTTP methods

POST

Request body for POST

Note: You can pass the campaign, donor, and designation IDs in an `externalId` object containing `fieldName` and `fieldValue`.

JSON example

```
{
  "processingOptions": {
    "donorOptions": {
      "defaultUpdateLogic": "update_all"
    }
  },
  "gifts": [
    {
      "amount": 150.25,
      "currencyIsoCode": "USD",
      "receivedDate": "2024-07-06",
      "donorCoverAmount": 0.25,
      "transactionStatus": "Unpaid",
      "commitmentId": "00x324303243fsfd",
      "paymentIdentifier": "1234",
    }
  ]
}
```

```

    "gatewayTransactionFee": 0.75,
    "processorTransactionFee": 0.45,
    "processorReference": "cls-1247586928747",
    "gatewayReference": "102656693ac3ca6e0cdafbfe89ab99",
    "lastGatewayResponseCode": "invalid_cvc",
    "lastGatewayErrorMessage": "The card's security code is invalid. Check the
card's security code or use a different card.",
    "lastGatewayProcessedDateTime": "2023-07-06T21:57:51Z",
    "campaign": {
      "id": "701y0030d0zk6t06f4"
    },
    "outreachSourceCode": {
      "id": "0gx000d0d0d0FD",
      "sourceCode": "AnimalEmailCampaign2023"
    },
    "donor": {
      "donorType": "individual",
      "id": "0015500000W01ZiAAL",
      "firstName": "Daniel",
      "lastName": "Chavez",
      "phone": "510-432-1234",
      "email": "danielchavez@salesforce.com",
      "address": [
        {
          "street": "123 Main Street",
          "city": "Oakland",
          "state": "CA",
          "postalCode": "94610",
          "country": "US"
        }
      ],
      "accountCustomFields": [
        {
          "fieldName": "string",
          "fieldValue": "string"
        }
      ]
    },
    "paymentInstrument": {
      "type": "credit card",
      "accountHolderName": "Daniel Chavez",
      "expiryMonth": "10",
      "expiryYear": "2026",
      "last4": "4321",
      "cardBrand": "Diners club",
      "bankName": "chase",
      "digitalWalletProvider": "Diner's Club",
      "bankAccountHolderType": "primary",
      "bankAccountType": "checking",
      "bankAccountNumber": "123456",
      "bankCode": "HBUK",
      "gatewayName": "Gateway",
      "processorName": "centpro",
      "processorPaymentReference": "string",

```

```

    "gatewayReference": "string"
  },
  "designations": [
    {
      "designationId": "0gd0030f0303024",
      "percent": 10,
      "amount": 150.25
    }
  ],
  "giftTransactionCustomFields": [
    {
      "fieldName": "string",
      "fieldValue": "string"
    }
  ]
}
]
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
gifts	Create Gift Request Input[]	Details of the request to create the gift.	Required	60.0
processing Options	Processing Options Details Input	Options for the donor matching process.	Optional	60.0

Response body for POST

[Create Gift](#)

SEE ALSO:

[Nonprofit Cloud Developer Guide: Fundraising](#)

Transactions Payment Updates (POST)

Update the gateway and processor metadata for gift transactions. This API supports updating only the properties that are specified in the request body. If you include any other standard or custom fields in the request body beyond the specified properties, an error is shown.

Resource

```
/connect/fundraising/transactions/payment-updates
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v66.0/connect/fundraising/transactions/payment-updates
```

Available version

60.0

HTTP methods

POST

Request body for POST**Note:** You can pass the transaction ID in an `externalId` object containing `fieldName` and `fieldValue`..**JSON example**

```
{
  "updates": [
    {
      "giftTransactionId": "6TR550000WO1ZIFGE",
      "transactionStatus": "Unpaid",
      "processorReference": "string",
      "gatewayReference": "string",
      "lastGatewayResponseCode": "invalid_cvc",
      "lastGatewayErrorMessage": "The card's security code is invalid. Check the card's security code or use a different card.",
      "lastGatewayProcessedDateTime": "2023-07-06T21:57:51Z"
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
updates	Transaction Payment Update Request Input[]	Contains the details of the request to update the transaction payment.	Required	60.0

Response body for POST[Transaction Payment Updates](#) on page 280

SEE ALSO:

[Nonprofit Cloud Developer Guide: Fundraising](#)**Commitments Payment Updates (POST)**

Update the metadata for your payment instruments for all active gift commitments.

Resource`/connect/fundraising/commitments/payment-updates`**Resource example**`https://yourInstance.salesforce.com/services/data/v66.0/connect/fundraising/commitments/payment-updates`**Available version**

60.0

HTTP methods

POST

Request body for POST

 **Note:** You can pass the commitment ID in an `externalId` object containing `fieldName` and `fieldValue`.

JSON example

```
{
  "updates": [
    {
      "giftCommitmentId": "6TR550000W01ZIFGE",
      "paymentInstrument": {
        "type": "Venmo",
        "accountHolderName": "Daniel Chavez",
        "expiryMonth": "10",
        "expiryYear": "2026",
        "last4": "4321",
        "cardBrand": "visa",
        "bankName": "chase",
        "digitalWalletProvider": "Diner's Club",
        "bankAccountHolderType": "primary",
        "bankAccountType": "checking",
        "bankAccountNumber": "123456",
        "bankCode": "HBUK",
        "gatewayName": "Gateway",
        "processorName": "Centpro",
        "processorPaymentReference": "string",
        "gatewayReference": "string"
      }
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
updates	Commitment Payment Updates Request Input[]	Contains the request details to update the commitment payment.	Required	60.0

Response body for POST

[Commitment Payment Updates](#)

SEE ALSO:

[Nonprofit Cloud Developer Guide: Fundraising](#)

Request Bodies

Learn more about the available Fundraising API request bodies.

[Address Details](#)

Input representation of the donor's address details.

[Campaign Details Input](#)

Input representation of the campaign that's associated with the gift transaction.

[Commitment Payment Updates Input](#)

Input representation of the details of the payment update to the fundraising commitments.

[Commitment Payment Updates Request Input](#)

Input representation of the details of the gift commitment and payment instrument.

[Create Commitment Input](#)

Input representation of the request to create commitments.

[Create Commitment Request Input](#)

Input representation of the request to create a recurring gift commitment. This request body accepts an array of commitment requests. However, for the API version 60.0, up to 100 commitments is supported per request.<

[Create Gift Input](#)

Input representation of the request to create gifts, including donor details, amount, and payment method.

[Create Gift Request Input](#)

Input representation of the data required to create a new gift. This request body accepts both standard and custom fields for donor account and gift transaction. If a standard field does not appear in the request body, you can include it in the customFields section for the relevant object.

[Custom Field Details Input](#)

Input representation of the custom fields for the request to incorporate custom attributes into records.

[Designation Details Input](#)

Input representation of the designations that are associated with the request.

[Donor Details Input](#)

Input representation of the donor details that's associated with the gift transaction.

[Donor Options Details Input](#)

Input representation of the available donor processing options that includes targeted update logic for the donor-related components of the commitment transaction.

[Outreach Source Code Details Input](#)

Input representation of the outreach source code that's associated with the request.

[Payment Instrument Details Input](#)

Input representation of the payment instrument used for the request.

[Processing Options Details Input](#)

Input representation of the donor processing options.

[Transaction Details Input](#)

Input representation of the transaction details.

Transaction Payment Update Request Input

Input representation of the details of the gateway and processor metadata to update the transaction payment. If you include any other standard or custom fields in the request body beyond the specified properties, an error is shown.

Transaction Payment Updates Input

Input representation of the gateway and processor metadata to update the transaction payment. If you include any other standard or custom fields in the request body beyond the specified properties, an error is shown.

Update Commitment Input

Input representation of the request to update a commitment.

Address Details

Input representation of the donor's address details.

JSON example

```
{
  "street": "123 Main Street",
  "city": "Oakland",
  "state": "CA",
  "postalCode": "94610",
  "country": "US"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
city	String	City of the donor.	Required	60.0
country	String	Country of the donor.	Required	60.0
postalCode	String	Postal code of the donor.	Required	60.0
state	String	State of the donor.	Required	60.0
street	String	Street name of the donor.	Required	60.0

Campaign Details Input

Input representation of the campaign that's associated with the gift transaction.

JSON example

```
{
  "campaign": {
    "id": "701y0030d0zk6t06f4"
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
id	String	ID of the gift designation. This ID can also be passed as an <code>externalID</code> in the format given below:	Optional	60.0
<pre>{ "externalId": { "fieldName": "<EXTERNAL_ID_FIELD_NAME>", "fieldValue": "<EXTERNAL_ID_FIELD_VALUE>" }, </pre>				

Commitment Payment Updates Input

Input representation of the details of the payment update to the fundraising commitments.

JSON example

```
{
  "updates": [
    {
      "giftCommitmentId": "6TR550000WO1ZIFGE",
      "paymentInstrument": {
        "type": "Venmo",
        "accountHolderName": "Daniel Chavez",
        "expiryMonth": "10",
        "expiryYear": "2026",
        "last4": "4321",
        "cardBrand": "visa",
        "bankName": "chase",
        "digitalWalletProvider": "Diner's Club",
        "bankAccountHolderType": "primary",
        "bankAccountType": "checking",
        "bankAccountNumber": "123456",
        "bankCode": "HBUK",
        "gatewayName": "Gateway",
        "processorName": "Centpro",
        "processorPaymentReference": "string",
        "gatewayReference": "string"
      }
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
updates	Commitment Payment Updates Request Input[]	Contains the request details to update the commitment payment.	Required	60.0

Commitment Payment Updates Request Input

Input representation of the details of the gift commitment and payment instrument.

JSON example



Note: You can pass the campaign, donor, and designation IDs in an `externalId` object containing `fieldName` and `fieldValue`.

```
{
  "giftCommitmentId": "6TR5500000WO1ZIFGE",
  "paymentInstrument": {
    "type": "Venmo",
    "accountHolderName": "Daniel Chavez",
    "expiryMonth": "10",
    "expiryYear": "2026",
    "last4": "4321",
    "cardBrand": "visa",
    "bankName": "chase",
    "digitalWalletProvider": "Diner's Club",
    "bankAccountHolderType": "primary",
    "bankAccountType": "checking",
    "bankAccountNumber": "123456",
    "bankCode": "HBUK",
    "gatewayName": "Gateway",
    "processorName": "Centpro",
    "processorPaymentReference": "string",
    "gatewayReference": "string"
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
gift CommitmentId	String	ID of the gift commitment record for the payment update. This ID can also be passed as an <code>externalID</code> in the format given below:	Required	60.0
		<pre>{ "externalId": {</pre>		

Name	Type	Description	Required or Optional	Available Version
		<pre> "fieldName": "<EXTERNAL_ID_FIELD_NAME>", "fieldValue": "<EXTERNAL_ID_FIELD_VALUE>" },</pre>		
payment Instrument	Payment Instrument Details Input on page 253	Contains details about the payment instrument.	Required	60.0

Create Commitment Input

Input representation of the request to create commitments.

JSON example

```
{
  "processingOptions": {
    "donorOptions": {
      "defaultUpdateLogic": "update_all"
    }
  },
  "commitments": [
    {
      "amount": 150.25,
      "type": "pledge",
      "currencyIsoCode": "USD",
      "transactionPeriod": "monthly",
      "transactionInterval": 3,
      "transactionDay": "5",
      "startDate": "2024-07-06",
      "endDate": "2024-07-06",
      "campaign": {
        "id": "701y0030d0zk6t06f4"
      },
      "outreachSourceCode": {
        "id": "0gx000d0d0d0FD",
        "sourceCode": "AnimalEmailCampaign2023"
      },
      "donor": {
        "donorType": "individual",
        "id": "001550000WO1ZxxAL",
        "organizationName": "mini cat town",
        "firstName": "Daniel",
        "lastName": "Chavez",
        "phone": "510-432-9876",
        "email": "d.chavez.com",
```

```

    "address": [
      {
        "street": "123 Main Street",
        "city": "Oakland",
        "state": "CA",
        "postalCode": "94610",
        "country": "US"
      }
    ],
    "accountCustomFields": [
      {
        "fieldName": "string",
        "fieldValue": "string"
      }
    ]
  },
  "paymentInstrument": {
    "type": "Credit Card",
    "accountHolderName": "Daniel Chavez",
    "expiryMonth": "10",
    "expiryYear": "2026",
    "last4": "4321",
    "cardBrand": "Diner's Club",
    "bankName": "chase",
    "digitalWalletProvider": "EwalletProvider",
    "bankAccountHolderType": "primary",
    "bankAccountType": "checking",
    "bankAccountNumber": "123456",
    "bankCode": "HBUK",
    "gatewayName": "Gateway",
    "processorName": "Centpro",
    "processorPaymentReference": "string",
    "gatewayReference": "string"
  },
  "designations": [
    {
      "designationId": "Ogd0030f0303024",
      "percent": 10
    }
  ],
  "firstTransaction": {
    "amount": 150.25,
    "receivedDate": "2024-07-06",
    "donorCoverAmount": 0.25,
    "transactionStatus": "Unpaid",
    "gatewayTransactionFee": 0.75,
    "processorTransactionFee": 0.45,
    "processorReference": "cls-1247586928747",
    "gatewayReference": "102656693ac3ca6e0cdafbfe89ab99",
    "lastGatewayResponseCode": "invalid_cvc",
    "lastGatewayErrorMessage": "The card's security code is invalid. Check the card's security code or use a different card.",
    "lastGatewayProcessedDateTime": "2023-07-06T21:57:51Z"
  },

```



```
    "giftCommitmentCustomFields": [
      {
        "fieldName": "string",
        "fieldValue": "string"
      }
    ],
    "giftCommitmentScheduleCustomFields": [
      {
        "fieldName": "string",
        "fieldValue": "string"
      }
    ],
    "giftTransactionCustomFields": [
      {
        "fieldName": "string",
        "fieldValue": "string"
      }
    ]
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
commitments	Create Commitment Request Input[]	Details of the request to create the commitment. Limited to 100 commitments in a single request.	Required	60.0
processing Options	Processing Options Details Input	Options for the donor matching process.	Optional	60.0

Create Commitment Request Input

Input representation of the request to create a recurring gift commitment. This request body accepts an array of commitment requests. However, for the API version 60.0, up to 100 commitments is supported per request.<

To include the standard fields for the donor account , use the [Create Commitment Input](#) request body to specify the standard fields.

JSON example

 **Note:** You can pass the campaign, donor, and designation IDs in an `externalId` object containing `fieldName` and `fieldValue`.

```
{
  "commitments": [
    {
      "amount": 15,
      "type": "pledge",
      "currencyIsoCode": "USD",
      "transactionInterval": 1,
      "transactionDay": "1",
      "startDate": "2023-11-01",
      "endDate": "",

```

```

"outreachSourceCode": {
  "sourceCode": "AnimalEmailCampaign2023"
},
"donor": {
  "donorType": "individual",
  "id": "0015500000WO1ZixxL",
  "firstName": "Daniel",
  "lastName": "Chavez",
  "phone": "510-432-1234",
  "email": "d.chavez@salesforce.com",
  "address": [
    {
      "street": "123 Main Street",
      "city": "Tardis",
      "state": "NJ",
      "postalCode": "08638",
      "country": "US"
    }
  ],
  "accountCustomFields": [
    {
      "fieldName": "string",
      "fieldValue": "string"
    }
  ]
},
"paymentInstrument": {
  "type": "Credit Card",
  "accountHolderName": "Daniel Chavez",
  "expiryMonth": "10",
  "expiryYear": "2026",
  "last4": "4321",
  "cardBrand": "Diner's Club",
  "bankName": "chase",
  "digitalWalletProvider": "",
  "bankAccountHolderType": "primary",
  "bankAccountType": "checking",
  "bankAccountNumber": "123456",
  "bankCode": "HBUK",
  "gatewayName": "Gateway",
  "processorName": "Centpro",
  "processorPaymentReference": "string",
  "gatewayReference": "string"
},
"designations": [
  {
    "designationId": "0gd0030f0303xx4",
    "percent": 0
  }
],
"firstTransaction": {
  "amount": 15,
  "receivedDate": "2023-11-02",
  "donorCoverAmount": 0.25,

```

```

    "transactionStatus": "Paid",
    "gatewayTransactionFee": 0.75,
    "processorTransactionFee": 0.045,
    "processorReference": "cls-1247586928747",
    "gatewayReference": "102656693ac3ca6e0cdafbfe89ab99",
    "lastGatewayResponseCode": "",
    "lastGatewayErrorMessage": "",
    "lastGatewayProcessedDateTime": "2023-11-02T21:57:51Z"
  }
}
]
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
accountCustomFields	Custom Field Details Input[]	Standard and custom fields for the donor account.	Optional	60.0
amount	Double	Expected amount of the gift transaction in the commitment schedule.	Required	60.0
campaign	Campaign Details Input	Campaign that's associated with the commitment.	Optional	60.0
currency IsoCode	String	Currency ISO code for the commitment.	Optional	60.0
designations	Designation Details Input[]	Default gift designations that are associated with the commitment.	Optional	60.0
donor	Donor Details Input	Person, household, or organization account that's associated with the commitment.	Required	60.0
endDate	String	Date when the total amount of the commitment is expected to be paid. The default format is YYYY-MM-DD.	Required	60.0
first Transaction	Transaction Details Input	First transaction of the commitment. Note: When type is pledge, this property cannot be included.	Optional	60.0
giftCommitment CustomFields	Custom Field Details Input[]	Standard and custom fields of the gift commitment.	Optional	60.0
giftCommitment Schedule CustomFields	Custom Field Details Input[]	Standard and custom fields of the gift commitment schedule.	Optional	60.0
giftTransaction CustomFields	Custom Field Details Input[]	Custom fields for the gift transaction. The giftTransactionCustomFields property also	Optional	60.0

Name	Type	Description	Required or Optional	Available Version
		accepts the standard fields for the gift transaction.		
outreach SourceCode	Outreach Source Code Details Input	Outreach source code that's associated with the campaign for the gift commitment schedule.	Optional	60.0
payment Instrument	Payment Instrument Details Input	Payment instrument that's used to complete the transaction.	Required	60.0
payment Processor CommitmentId	String	Reference number of the commitment that was assigned by the processor.	Optional	60.0
startDate	String	Date from when the commitment is in effect. The default format is YYYY-MM-DD.	Required	60.0
transaction Day	String	Day of the month to create gift transaction in the future for a monthly transaction period. If you select the day as 29 or 30, the gift transaction is created on the last day for months that don't have that many days.	Optional	60.0
transaction Interval	Integer	Transaction interval that's applicable to the incoming transaction in the commitment.	Optional	60.0
transaction Period	String	Transaction period that's applicable to the incoming transaction in the commitment. When <code>type</code> is <code>pledge</code> , this property must be set to <code>Custom</code> . If <code>transactionPeriod</code> is not provided, the default is <code>Custom</code> .	Required	60.0
type	String	Type of transaction. Possible values are: • Pledge • Recurring The default value is the <code>Recurring</code> .	Optional	62.0

Create Gift Input

Input representation of the request to create gifts, including donor details, amount, and payment method.

JSON example

```
{
  "processingOptions": {
    "donorOptions": {
```

```

    "defaultUpdateLogic": "update_all"
  }
},
"gifts": [
  {
    "amount": 150.25,
    "currencyIsoCode": "USD",
    "receivedDate": "2024-07-06",
    "donorCoverAmount": 0.25,
    "transactionStatus": "Unpaid",
    "commitmentId": "00x324303243fsfd",
    "paymentIdentifier": "1234",
    "gatewayTransactionFee": 0.75,
    "processorTransactionFee": 0.45,
    "processorReference": "cls-1247586928747",
    "gatewayReference": "102656693ac3ca6e0cdafbfe89ab99",
    "lastGatewayResponseCode": "invalid_cvc",
    "lastGatewayErrorMessage": "The card's security code is invalid. Check the card's
security code or use a different card.",
    "lastGatewayProcessedDateTime": "2023-07-06T21:57:51Z",
    "campaign": {
      "id": "701y0030d0zk6t06f4"
    },
    "outreachSourceCode": {
      "id": "0gx000d0d0d0FD",
      "sourceCode": "AnimalEmailCampaign2023"
    },
    "donor": {
      "donorType": "individual",
      "id": "0015500000W01ZiAAL",
      "firstName": "Daniel",
      "lastName": "Chavez",
      "phone": "510-432-1234",
      "email": "danielchavez@salesforce.com",
      "address": [
        {
          "street": "123 Main Street",
          "city": "Oakland",
          "state": "CA",
          "postalCode": "94610",
          "country": "US"
        }
      ],
    },
    "accountCustomFields": [
      {
        "fieldName": "string",
        "fieldValue": "string"
      }
    ]
  },
  "paymentInstrument": {
    "type": "credit card",
    "accountHolderName": "Daniel Chavez",
    "expiryMonth": "10",

```

```
    "expiryYear": "2026",
    "last4": "4321",
    "cardBrand": "Diners club",
    "bankName": "chase",
    "digitalWalletProvider": "Diner's Club",
    "bankAccountHolderType": "primary",
    "bankAccountType": "checking",
    "bankAccountNumber": "123456",
    "bankCode": "HBUK",
    "gatewayName": "Gateway",
    "processorName": "centpro",
    "processorPaymentReference": "string",
    "gatewayReference": "string"
  },
  "designations": [
    {
      "designationId": "Ogd0030f0303024",
      "percent": 10,
      "amount": 150.25
    }
  ],
  "giftTransactionCustomFields": [
    {
      "fieldName": "string",
      "fieldValue": "string"
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
gifts	Create Gift Request Input[]	Details of the request to create the gift.	Required	60.0
processing Options	Processing Options Details Input	Options for the donor matching process.	Optional	60.0

Create Gift Request Input

Input representation of the data required to create a new gift. This request body accepts both standard and custom fields for donor account and gift transaction. If a standard field does not appear in the request body, you can include it in the customFields section for the relevant object.

JSON example

```
{
  "gifts": [
    {
      "amount": 150.25,
```

```

"currencyIsoCode": "USD",
"receivedDate": "2024-07-06",
"donorCoverAmount": 0.25,
"transactionStatus": "Unpaid",
"commitmentId": "00x324303243fsfd",
"paymentIdentifier": "1234",
"gatewayTransactionFee": 0.75,
"processorTransactionFee": 0.45,
"processorReference": "cls-1247586928747",
"gatewayReference": "102656693ac3ca6e0cdafbfe89ab99",
"lastGatewayResponseCode": "invalid_cvc",
"lastGatewayErrorMessage": "The card's security code is invalid. Check the card's
security code or use a different card.",
"lastGatewayProcessedDateTime": "2023-07-06T21:57:51Z",
"campaign": {
  "id": "701y0030d0zk6t06f4"
},
"outreachSourceCode": {
  "id": "0gx000d0d0d0FD",
  "sourceCode": "AnimalEmailCampaign2023"
},
"donor": {
  "donorType": "individual",
  "id": "0015500000W01ZixxL",
  "firstName": "Daniel",
  "lastName": "Chavez",
  "phone": "510-432-1234",
  "email": "example@salesforce.com",
  "address": [
    {
      "street": "123 Main Street",
      "city": "Oakland",
      "state": "CA",
      "postalCode": "94610",
      "country": "US"
    }
  ],
  "accountCustomFields": [
    {
      "fieldName": "string",
      "fieldValue": "string"
    }
  ]
},
"paymentInstrument": {
  "type": "credit card",
  "accountHolderName": "Daniel Chavez",
  "expiryMonth": "10",
  "expiryYear": "2026",
  "last4": "4321",
  "cardBrand": "visa",
  "bankName": "chase",
  "digitalWalletProvider": "Diner's Club",
  "bankAccountHolderType": "primary",

```

```

    "bankAccountType": "checking",
    "bankAccountNumber": "123456",
    "bankCode": "HBUK",
    "gatewayName": "Gateway",
    "processorName": "OptiSynth",
    "processorPaymentReference": "string",
    "gatewayReference": "string"
  },
  "designations": [
    {
      "designationId": "0gd0030f0303024",
      "percent": 10,
      "amount": 150.25
    }
  ],
  "giftTransactionCustomFields": [
    {
      "fieldName": "string",
      "fieldValue": "string"
    }
  ]
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
accountCustomFields	Custom Field Details Input[]	Custom fields for the donor account. The accountCustomFields property also accepts the standard fields for the donor account.	Optional	60.0
amount	Double	Original amount of the gift transaction.	Required	60.0
campaign	Campaign Details Input	Campaign that's associated with the gift transaction.	Optional	60.0
commitmentId	String	Gift commitment ID that's associated with the gift transaction.	Optional	60.0
currency IsoCode	String	ISO code of the currency.	Optional	60.0
designations	Designation Details Input[]	Designations that are associated with the gift transaction.	Optional	60.0
donor	Donor Details Input	Donor details that are associated with the gift transaction.	Required	60.0
donorCover Amount	Double	Amount that the donor added to their gift to cover fees.	Optional	60.0

Name	Type	Description	Required or Optional	Available Version
gatewayReference	String	Reference of the transaction to which the gateway is assigned.	Optional	60.0
gatewayTransactionFee	Double	Transaction fees charged by the gateway.	Optional	60.0
giftTransactionCustomFields	Custom Field Details Input[]	Custom fields for the gift transaction. The giftTransactionCustomFields property also accepts the standard fields for the gift transaction.	Optional	60.0
lastGatewayErrorMessage	String	Most recent error message received by the gateway.	Optional	60.0
lastGatewayProcessedDate Time	String	Last attempt made by the gateway.	Optional	60.0
lastGatewayResponseCode	String	Most recent response code that was received by the gateway.	Optional	60.0
outreachSourceCode	Outreach Source Code Details Input	Outreach source code that's associated with the gift transaction.	Optional	60.0
paymentIdentifier	String	Unique ID for the payment transaction.	Optional	60.0
paymentInstrument	Payment Instrument Details Input	Payment instrument used for the gift transaction.	Required	60.0
processorReference	String	Reference of the transaction to which the payment processor is assigned.	Optional	60.0
processorTransactionFee	Double	Transaction fees charged by the processor.	Optional	60.0
receivedDate	String	Date when the donor completed the gift transaction.	Required	60.0
transactionStatus	String	Status of the gift transaction.	Required	60.0

Custom Field Details Input

Input representation of the custom fields for the request to incorporate custom attributes into records.

You can include the standard fields such as Description, EffectiveStartDate, and more in this request body. To include the standard fields in the request body, specify the API name of the standard field as the value of the `fieldName` property, and provide the value for the standard field in the `fieldValue` property.

JSON example

This example shows a sample request that includes a standard field.

```
{
  "fieldName": "effectiveStartDate",
  "fieldValue": "2024-05-06"
}
```

This example shows a sample request that includes a custom field.

```
{
  "fieldName": "TShirtSize__c",
  "fieldValue": "Medium"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
fieldName	String	API name of the custom or standard field.	Optional	60.0
fieldValue	Object	Value of the custom or standard field.	Optional	60.0

Designation Details Input

Input representation of the designations that are associated with the request.

JSON example

```
{
  "designations": {
    "id": "0gd0030f0303xx4",
    "amount": 150.25,
    "percent": 10
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
amount	Double	Transaction amount that's allocated to the designation, which is for gifts only.	Optional	60.0
id	String	ID of the gift designation. This ID can also be passed as an externalID in the format given below: <pre>{ "externalId": { "fieldName": "<EXTERNAL_ID_FIELD_NAME>",</pre>	Optional	60.0

Name	Type	Description	Required or Optional	Available Version
		<pre> "fieldValue": "<EXTERNAL_ID_FIELD_VALUE>" }, </pre>		
percent	Double	Percentage of the transaction or commitment amount that's allocated to the designation.	Optional	60.0

Donor Details Input

Input representation of the donor details that's associated with the gift transaction.

JSON example

```

{
  "donorType": "individual",
  "id": "0015500000W01ZiAAL",
  "firstName": "Daniel",
  "lastName": "Chavez",
  "phone": "510-434-8920",
  "email": "d.chavez@salesforce.com",
  "address": [
    {
      "street": "123 Main Street",
      "city": "Oakland",
      "state": "CA",
      "postalCode": "94610",
      "country": "US"
    }
  ],
  "accountCustomFields": [
    {
      "fieldName": "string",
      "fieldValue": "string"
    }
  ]
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
accountCustomFields	Custom Field Details Input[]	Account standard and custom fields of the donor.	Optional	60.0

Name	Type	Description	Required or Optional	Available Version
address	Address Details Input[]	Address details of the donor.	Optional	60.0
donorType	String	Type of the donor. You can't use the <code>organizationName</code> when the <code>donorType</code> is set to <code>Individual</code> . Similarly, don't use <code>firstName</code> or <code>lastName</code> properties when the <code>donorType</code> is <code>Organizational</code> .	Required	60.0
email	String	Email address of the donor.	Optional	60.0
firstName	String	First name of the donor.	Required	60.0
id	String	ID of the gift designation. This ID can also be passed as an <code>externalID</code> in the format given below: <pre> { "externalId": { "fieldName": "<EXTERNAL_ID_FIELD_NAME>", "fieldValue": "<EXTERNAL_ID_FIELD_VALUE>" } </pre>	Optional	60.0
lastName	String	Last name of the donor.	Required	60.0
organization Name	String	Organization name of the donor.	Required	60.0
phone	String	Phone number of the donor.	Optional	60.0

Donor Options Details Input

Input representation of the available donor processing options that includes targeted update logic for the donor-related components of the commitment transaction.

JSON example

```

"donorOptions": {
    "defaultUpdateLogic": "update_all"
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
default UpdateLogic	String	Default update value for the donor updates. Valid values are: • <code>update_all</code>- If an existing donor is matched (whether by a record ID, external ID, or Duplicate Rules), any donor properties that are provided are updated on the matched donor's account, including any custom account field mappings. • <code>no_update</code>- If an existing donor is matched (whether by a record ID, external ID, or Duplicate Rules), none of the donor properties that are provided are updated on the matched donor's account, including any custom account field mappings.	Optional	60.0

Outreach Source Code Details Input

Input representation of the outreach source code that's associated with the request.

JSON example

```
{
  "id": "0gx000d0d0d0FD",
  "sourceCode": "AnimalEmailCampaign2023"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
id	String	ID of the outreach source code.	Optional	60.0
sourceCode	String	Unique code associated with the outreach source.	Optional	60.0

Payment Instrument Details Input

Input representation of the payment instrument used for the request.

JSON example

```
{
  "type": "Credit Card",
}
```

```

"accountHolderName": "Diana Gómez",
"expiryMonth": "10",
"expiryYear": "2026",
"last4": "4321",
"cardBrand": "Diner's Club",
"bankName": "chase",
"digitalWalletProvider": "",
"bankAccountHolderType": "",
"bankAccountType": "",
"bankAccountNumber": "",
"bankCode": "",
"gatewayName": "Gateway",
"processorName": "Centpro",
"processorPaymentReference": "string",
"gatewayReference": "string"
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
accountHolderName	String	Name of the payment instrument holder.	Optional	60.0
bankAccountHolderType	String	Specifies if the bank account holder is an individual or a company.	Optional	60.0
bankAccountNumber	String	Bank account number associated with the payment instrument.	Optional	60.0
bankAccountType	String	Type of the bank account.	Optional	60.0
bankCode	String	Code of the bank that's associated with the bank account.	Optional	60.0
bankName	String	Bank name that's associated with the bank account.	Optional	60.0
cardBrand	String	Brand, network, or issuer of the credit card.	Optional	60.0
digitalWalletProvider	String	Provider of the digital wallet.	Optional	60.0
expiryMonth	String	Expiration month if the payment method is credit card.	Optional	60.0
expiryYear	String	Expiration year if the payment method is credit card.	Optional	60.0
gatewayName	String	Name of the payment gateway.	Optional	60.0
gatewayReference	String	Reference number of the gateway for this payment instrument.	Optional	60.0

Name	Type	Description	Required or Optional	Available Version
last4	String	Last four digits of the account number for the payment method.	Optional	60.0
processorName	String	Name of the payment processor.	Optional	60.0
processorPaymentReference	String	Reference of the payment processor that's associated with the payment instrument.	Optional	60.0
type	String	Type of the payment instrument used for the request.	Required	60.0

Processing Options Details Input

Input representation of the donor processing options.

JSON example

```
{
  "processingOptions": {
    "donorOptions": {
      "defaultUpdateLogic": "update_all"
    }
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
donorOptions	Donor Options Details Input	Donor processing options to create gift commitments.	Optional	60.0

Transaction Details Input

Input representation of the transaction details.

JSON example

```
{
  "amount": 150.25,
  "receivedDate": "2024-07-06",
  "donorCoverAmount": 0.25,
  "transactionStatus": "Unpaid",
  "gatewayTransactionFee": 0.75,
  "processorTransactionFee": 0.45,
  "processorReference": "cls-1247586928747",
  "gatewayReference": "102656693ac3ca6e0cdafbfe89ab99",
  "lastGatewayResponseCode": "invalid_cvc",
  "lastGatewayErrorMessage": "The card's security code is invalid. Check the card's
```

```
security code or use a different card.",
  "lastGatewayProcessedDateTime": "2023-07-06T21:57:51Z"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
amount	Double	Original amount of the gift transaction.	Optional	60.0
donor CoverAmount	Double	Amount that the donor added to their gift to cover fees.	Optional	60.0
gateway Reference	String	Reference of the transaction to which the gateway is assigned.	Optional	60.0
gateway TransactionFee	Double	Transaction fees charged by the gateway.	Optional	60.0
lastGateway ErrorMessage	String	Most recent error message received by the gateway.	Optional	60.0
lastGateway ProcessedDateTime	String	Last attempt made by the gateway.	Optional	60.0
lastGateway ResponseCode	String	Most recent response code that was received by the gateway.	Optional	60.0
processor Reference	String	Reference of the transaction to which the payment processor is assigned.	Optional	60.0
processor TransactionFee	Double	Transaction fees charged by the processor.	Optional	60.0
receivedDate	String	Date when the donor completed the gift transaction.	Optional	60.0
transaction Status	String	Transaction status of the gift.	Optional	60.0

Transaction Payment Update Request Input

Input representation of the details of the gateway and processor metadata to update the transaction payment. If you include any other standard or custom fields in the request body beyond the specified properties, an error is shown.

JSON example

```
{
  "giftTransactionId": "6TR5500000WO1ZIxxE",
  "transactionStatus": "Unpaid",
  "processorReference": "string",
  "gatewayReference": "string",
  "lastGatewayResponseCode": "invalid_cvc",
  "lastGatewayErrorMessage": "The card's security code is invalid. Check the card's security code or use a different card.",
}
```



```
{
  "lastGatewayProcessedDateTime": "2023-07-06T21:57:51Z"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
gateway Reference	String	Reference of the transaction to which the gateway is assigned.	Optional	60.0
gift TransactionId	String	ID of the gift transaction record. This ID can also be passed as an <code>externalID</code> in the format given below: <pre>{ "externalId": { "fieldName": "<EXTERNAL_ID_FIELD_NAME>", "fieldValue": "<EXTERNAL_ID_FIELD_VALUE>" } }</pre>	Required	60.0
lastGateway ErrorMessage	String	Most recent error message received by the gateway.	Optional	60.0
lastGateway Processed DateTime	String	Last attempt made by the gateway.	Optional	60.0
lastGateway ResponseCode	String	Most recent response code that was received by the gateway.	Optional	60.0
processor Reference	String	Reference of the transaction to which the payment processor is assigned.	Optional	60.0
transaction Status	String	Gift status of the transaction.	Required	60.0

Transaction Payment Updates Input

Input representation of the gateway and processor metadata to update the transaction payment. If you include any other standard or custom fields in the request body beyond the specified properties, an error is shown.

JSON example

```
{
  "updates": [
    {
      "giftTransactionId": "6TR5500000W01ZIFGE",

```

```
      "transactionStatus": "Unpaid",
      "processorReference": "string",
      "gatewayReference": "string",
      "lastGatewayResponseCode": "invalid_cvc",
      "lastGatewayErrorMessage": "The card's security code is invalid. Check the card's security code or use a different card.",
      "lastGatewayProcessedDateTime": "2023-07-06T21:57:51Z"
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
updates	Transaction Payment Update Request Input[]	Contains the details of the request to update the transaction payment.	Required	60.0

Update Commitment Input

Input representation of the request to update a commitment.

JSON example

```
{
  "amount": 150.25,
  "type": "pledge",
  "transactionInterval": 3,
  "transactionDay": "5",
  "startDate": "2024-07-06",
  "endDate": "2024-07-06",
  "campaign": {
    "id": "701y0030d0zk6t06f4"
  },
  "outreachSourceCode": {
    "id": "0gx000d0d0d0FD",
    "sourceCode": "AnimalEmailCampaign2023"
  },
  "donor": {
    "donorType": "individual",
    "organizationName": "ABC Inc.",
    "firstName": "Daniel",
    "lastName": "Chavez",
    "phone": "510-434-8920",
    "email": "d.chavez@salesforce.com",
    "address": [
      {
        "street": "123 Main Street",
        "city": "Oakland",
        "state": "CA",
        "postalCode": "94610",
        "country": "US"
      }
    ]
  }
}
```

```
    }
  ],
  "accountCustomFields": [
    {
      "fieldName": "string",
      "fieldValue": "string"
    }
  ],
  "paymentInstrument": {
    "type": "Credit Card",
    "accountHolderName": "Daniel Chavez",
    "expiryMonth": "10",
    "expiryYear": "2026",
    "last4": "4321",
    "cardBrand": "Diner's Club",
    "bankName": "chase",
    "digitalWalletProvider": "EProvider",
    "bankAccountHolderType": "primary",
    "bankAccountType": "checking",
    "bankAccountNumber": "123456",
    "bankCode": "HBUK",
    "gatewayName": "Gateway",
    "processorName": "Centpro",
    "processorPaymentReference": "string",
    "gatewayReference": "string"
  },
  "giftCommitmentCustomFields": [
    {
      "fieldName": "string",
      "fieldValue": "string"
    }
  ],
  "giftCommitmentScheduleCustomFields": [
    {
      "fieldName": "string",
      "fieldValue": "string"
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
amount	Double	Gift amount of each transaction associated with the gift commitment schedule.	Required	60.0
campaign	Campaign Details	Campaign that's associated with the gift commitment.	Optional	60.0
currency IsoCode	String	Currency ISO code of the gift commitment.	Optional	60.0

Name	Type	Description	Required or Optional	Available Version
donorId	Donor Details Input	Person, household, or organization account associated with the commitment.	Optional	60.0
endDate	String	End date of the new schedule for this gift commitment. The format is YYYY-MM-DD.	Optional	60.0
giftCommitmentCustomFields	Custom Field Details[]	Custom fields of the gift commitment.	Optional	60.0
giftCommitmentScheduleCustomFields	Custom Field Details[]	Custom fields of the gift commitment schedule.	Optional	60.0
outreachSourceCode	Outreach Source Code Details	Outreach source code that's associated with the campaign for the gift commitment.	Optional	60.0
paymentInstrument	Payment Instrument Details	Payment instrument that's used to complete the transaction.	Required	60.0
startDate	String	Start date of the new schedule for this gift commitment. The format is YYYY-MM-DD.	Required	60.0
transactionDay	String	Specifies the day of the month to create gift transactions in the future for a monthly transaction period. If you select the day as 29 or 30, the gift transaction is created on the last day for the months that don't have that many days.	Optional	60.0
transactionInterval	Integer	Transaction interval that's applicable to an incoming transaction in the commitment.	Optional	60.0
transactionPeriod	String	Transaction period that's applicable to the incoming transaction in the commitment. When <code>type</code> is <code>pledge</code> , this property must be set to <code>Custom</code> . If <code>transactionPeriod</code> is not provided, the default is <code>Custom</code> .	Required	60.0
type	String	Type of transaction. Possible values are: • Pledge • Recurring The default value is the <code>Recurring</code> .	Optional	62.0

Response Bodies

Learn more about the available Fundraising API response bodies.

[Commitment Payment Updates](#)

Output representation of the request to update the commitment payment for a fundraising commitment.

[Commitment Payment Updates](#)

Output representation of the updates for the commitment payment.

[Commitment Payment Updates Response Link](#)

Output representation of the links to the response object for the commitment payment updates.

[Create Commitment](#)

Output representation of the fundraising commitment request that contains the commitment ID and associated links.

[Create Commitment Response Details](#)

Output representation of the create commitment result with success status code, error, if any, and associated object links.

[Create Commitment Response Link](#)

Output representation of the links to the response object.

[Create Gift](#)

Output representation of the details of the created gift transaction response.

[Create Gift Response Details](#)

Output representation of the request details to create the gift.

[Create Gift Response Link](#)

Output representation of the links to the response object.

[Error Details](#)

Output representation of the errors encountered during an API request.

[Gift Campaign Default Designations Output](#)

Output representation of a list of default designations associated with a gift campaign record.

[Gift Campaign Default Designation Record Output](#)

Output representation of a default designation record associated with a gift campaign.

[Gift Commitment Default Designations Output](#)

Output representation of a list of default designations associated with a gift commitment.

[Gift Commitment Default Designation Record Output](#)

Output representation of a default designation record associated with a gift commitment.

[Gift Commitment Transaction Matching Output](#)

Output representation of a list of gift transactions.

[Gift Transactions Output](#)

Output representation of the gift transactions associated with a gift commitment record.

[Gift Transaction Linked Designations Output](#)

Output representation of a list of gift designations.

[Gift Transaction Record Output](#)

Output representation of a gift transaction record.

[Gift Designation Record Output](#)

Output representation of a gift designation record.

[Link Details](#)

Output representation of the link details for the response object.

[Transaction Payment Updates](#)

Output representation of the transaction payment updates.

[Transaction Payment Updates Response](#)

Output representation of the updates for the transaction payment.

[Transaction Payment Updates Response Link](#)

Output representation of the links to the response object for the transaction payment updates.

[Update Commitment](#)

Output representation of the update commitment request that contains the status, errors if any, and the links to objects after you update a gift commitment.

[Update Commitment Response Link](#)

Output representation of the links to the response object for the commitment updates.

Commitment Payment Updates

Output representation of the request to update the commitment payment for a fundraising commitment.

Sample Response

```
{
  "successes": 0,
  "failures": 0,
  "notProcessed": 0,
  "details": [
    {
      "success": true,
      "errors": [
        {
          "field": "string",
          "message": "string"
        }
      ],
      "links": {
        "giftcommitment": {
          "href": "/services/data/vXX.X/objects/sObject/...",
          "id": "string"
        },
        "paymentinstrument": {
          "href": "/services/data/vXX.X/objects/sObject/...",
          "id": "string"
        }
      }
    }
  ]
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
details	Commitment Payment Updates[] on page 263	Contains the response of the commitment payment update.	Small, 60.0	60.0
failures	Integer	Number of gift commitments that failed to be updated.	Small, 60.0	60.0
notProcessed	Integer	Number of gift commitments that weren't processed.	Small, 60.0	60.0
successes	Integer	Number of gift commitments that were updated.	Small, 60.0	60.0

Commitment Payment Updates

Output representation of the updates for the commitment payment.

Sample Response

```
{
  "details": [
    {
      "success": true,
      "errors": [
        {
          "field": "string",
          "message": "string"
        }
      ],
      "links": {
        "giftcommitment": {
          "href": "/services/data/vXX.X/subjects/sObject/...",
          "id": "string"
        },
        "paymentinstrument": {
          "href": "/services/data/vXX.X/subjects/sObject/...",
          "id": "string"
        }
      }
    }
  ]
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
errors	Error Details[]	Error message if a process failed.	Small, 60.0	60.0
links	Commitment Payment Updates Response Link	Links to the response object.	Small, 60.0	60.0

Property Name	Type	Description	Filter Group and Version	Available Version
success	Boolean	Indicates whether the request was processed successfully (<code>true</code>) or not (<code>false</code>).	Small, 60.0	60.0

Commitment Payment Updates Response Link

Output representation of the links to the response object for the commitment payment updates.

Sample Response

```
{
  "links": {
    "giftcommitment": {
      "href": "/services/data/vXX.X/subjects/sObject/...",
      "id": "string"
    },
    "paymentinstrument": {
      "href": "/services/data/vXX.X/subjects/sObject/...",
      "id": "string"
    }
  }
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
gift commitment	Link Details	Link to the gift commitment response.	Small, 60.0	60.0
payment instrument	Link Details	Link to the first payment instrument response.	Small, 60.0	60.0

Create Commitment

Output representation of the fundraising commitment request that contains the commitment ID and associated links.

Sample Response

```
{
  "successes": 0,
  "failures": 0,
  "notProcessed": 0,
  "details": [
    {
      "success": true,
      "errors": [
        {
          "field": "string",
          "message": "string"
        }
      ]
    }
  ]
}
```



```
    ],
    "links": {
      "giftcommitment": {
        "href": "/services/data/vXX.X/subjects/sObject/...",
        "id": "string"
      },
      "giftcommitmentschedule": {
        "href": "/services/data/vXX.X/subjects/sObject/...",
        "id": "string"
      },
      "giftdefaultdesignation": [
        {
          "href": "/services/data/vXX.X/subjects/sObject/...",
          "id": "string"
        }
      ],
      "gifttransaction": {
        "href": "/services/data/vXX.X/subjects/sObject/...",
        "id": "string"
      },
      "paymentinstrument": {
        "href": "/services/data/vXX.X/subjects/sObject/...",
        "id": "string"
      },
      "account": {
        "href": "/services/data/vXX.X/subjects/sObject/...",
        "id": "string"
      }
    }
  }
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
details	Create Commitment Response Details[]	Contains the response to the create commitment request.	Small, 60.0	60.0
failures	Integer	Number of commitments that failed to be created.	Small, 60.0	60.0
notProcessed	Integer	Number of commitments that weren't processed.	Small, 60.0	60.0
successes	Integer	Number of successful commitments that were created.	Small, 60.0	60.0

Create Commitment Response Details

Output representation of the create commitment result with success status code, error, if any, and associated object links.

Sample Response

```
{
  "details": [
    {
      "success": true,
      "errors": [
        {
          "field": "string",
          "message": "string"
        }
      ],
      "links": {
        "giftcommitment": {
          "href": "/services/data/vXX.X/subjects/sObject/...",
          "id": "string"
        },
        "giftcommitmentschedule": {
          "href": "/services/data/vXX.X/subjects/sObject/...",
          "id": "string"
        },
        "giftdefaultdesignation": [
          {
            "href": "/services/data/vXX.X/subjects/sObject/...",
            "id": "string"
          }
        ],
        "gifttransaction": {
          "href": "/services/data/vXX.X/subjects/sObject/...",
          "id": "string"
        },
        "paymentinstrument": {
          "href": "/services/data/vXX.X/subjects/sObject/...",
          "id": "string"
        },
        "account": {
          "href": "/services/data/vXX.X/subjects/sObject/...",
          "id": "string"
        }
      }
    }
  ]
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
errors	Error Details[]	Details of the error if the request failed to process.	Small, 60.0	60.0
links	Create Commitment Response Link	Links to the response object.	Small, 60.0	60.0

Property Name	Type	Description	Filter Group and Version	Available Version
success	Boolean	Indicates whether the request was processed successfully (<code>true</code>) or not (<code>false</code>).	Small, 60.0	60.0

Create Commitment Response Link

Output representation of the links to the response object.

Sample Response

```
{
  "links": {
    "giftcommitment": {
      "href": "/services/data/vXX.X/subjects/sObject/...",
      "id": "string"
    },
    "giftcommitmentschedule": {
      "href": "/services/data/vXX.X/subjects/sObject/...",
      "id": "string"
    },
    "giftdefaultdesignation": [
      {
        "href": "/services/data/vXX.X/subjects/sObject/...",
        "id": "string"
      }
    ],
    "gifttransaction": {
      "href": "/services/data/vXX.X/subjects/sObject/...",
      "id": "string"
    },
    "paymentinstrument": {
      "href": "/services/data/vXX.X/subjects/sObject/...",
      "id": "string"
    },
    "account": {
      "href": "/services/data/vXX.X/subjects/sObject/...",
      "id": "string"
    }
  }
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
account	Link Details	Link to the donor account.	Small, 60.0	60.0
giftcommitment	Link Details	Link to the gift commitment response.	Small, 60.0	60.0
giftcommitment schedule	Link Details	Link to the gift commitment schedule response.	Small, 60.0	60.0

Property Name	Type	Description	Filter Group and Version	Available Version
giftdefault designation	Link Details[]	Link to the gift default designation response.	Small, 60.0	60.0
gift transaction	Link Details	Link to the first gift transaction response.	Small, 60.0	60.0
payment instrument	Link Details	Link to the first payment instrument response.	Small, 60.0	60.0

Create Gift

Output representation of the details of the created gift transaction response.

Sample Response

```
{
  "successes": 0,
  "failures": 0,
  "notProcessed": 0,
  "details": [
    {
      "success": true,
      "errors": [
        {
          "field": "string",
          "message": "string"
        }
      ],
      "links": {
        "account": {
          "href": "/services/data/vXX.X/subjects/sObject/...",
          "id": "string"
        },
        "gifttransaction": {
          "href": "/services/data/vXX.X/subjects/sObject/...",
          "id": "string"
        },
        "giftcommitment": {
          "href": "/services/data/vXX.X/subjects/sObject/...",
          "id": "string"
        },
        "paymentinstrument": {
          "href": "/services/data/vXX.X/subjects/sObject/...",
          "id": "string"
        },
        "gifttransactiondesignation": [
          {
            "href": "/services/data/vXX.X/subjects/sObject/...",
            "id": "string"
          }
        ]
      }
    }
  ],
}
```

```

    "campaign": {
      "href": "/services/data/vXX.X/subjects/sObject/...",
      "id": "string"
    },
    "outreachsourcecode": {
      "href": "/services/data/vXX.X/subjects/sObject/...",
      "id": "string"
    }
  }
}
]
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
details	Create Gift Response Details[]	Contains the details of the gift response.	Small, 60.0	60.0
failures	Integer	Number of transactions that failed to be created.	Small, 60.0	60.0
notProcessed	Integer	Number of transactions that weren't processed.	Small, 60.0	60.0
successes	Integer	Number of transactions that were created.	Small, 60.0	60.0

Create Gift Response Details

Output representation of the request details to create the gift.

Sample Response

```

{
  "details": [
    {
      "success": true,
      "errors": [
        {
          "field": "string",
          "message": "string"
        }
      ],
      "links": {
        "account": {
          "href": "/services/data/vXX.X/subjects/sObject/...",
          "id": "string"
        },
        "gifttransaction": {
          "href": "/services/data/vXX.X/subjects/sObject/...",
          "id": "string"
        },
        "giftcommitment": {
          "href": "/services/data/vXX.X/subjects/sObject/...",

```

```
      "id": "string"
    },
    "paymentinstrument": {
      "href": "/services/data/vXX.X/subjects/sObject/...",
      "id": "string"
    },
    "gifttransactiondesignation": [
      {
        "href": "/services/data/vXX.X/subjects/sObject/...",
        "id": "string"
      }
    ],
    "campaign": {
      "href": "/services/data/vXX.X/subjects/sObject/...",
      "id": "string"
    },
    "outreachsourcecode": {
      "href": "/services/data/vXX.X/subjects/sObject/...",
      "id": "string"
    }
  }
}
]
```

Property Name	Type	Description	Filter Group and Version	Available Version
errors	Error Details[]	Details of the error if the request failed to process.	Small, 60.0	60.0
links	Create Gift Response Link	Links to the response object.	Small, 60.0	60.0
success	Boolean	Indicates whether the request was processed successfully (<code>true</code>) or not (<code>false</code>).	Small, 60.0	60.0

Create Gift Response Link

Output representation of the links to the response object.

Sample Response

```
{
  "links": {
    "account": {
      "href": "/services/data/vXX.X/subjects/sObject/...",
      "id": "string"
    },
    "gifttransaction": {
      "href": "/services/data/vXX.X/subjects/sObject/...",
      "id": "string"
    }
  }
}
```

```
    "giftcommitment": {
      "href": "/services/data/vXX.X/subjects/sObject/...",
      "id": "string"
    },
    "paymentinstrument": {
      "href": "/services/data/vXX.X/subjects/sObject/...",
      "id": "string"
    },
    "gifttransactiondesignation": [
      {
        "href": "/services/data/vXX.X/subjects/sObject/...",
        "id": "string"
      }
    ],
    "campaign": {
      "href": "/services/data/vXX.X/subjects/sObject/...",
      "id": "string"
    },
    "outreachsourcecode": {
      "href": "/services/data/vXX.X/subjects/sObject/...",
      "id": "string"
    }
  }
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
account	Link Details	Link to the donor account.	Small, 60.0	60.0
gift commitment	Link Details	Link to the gift commitment response.	Small, 60.0	60.0
gift transaction	Link Details	Link to the gift transaction response.	Small, 60.0	60.0
gifttransaction designation	Link Details	Link to the gift transaction designations.	Small, 60.0	60.0
payment instrument	Link Details	Link to the payment instrument response.	Small, 60.0	60.0

Error Details

Output representation of the errors encountered during an API request.

Sample Response

```
{
  "errors": {
    "field": "string",
    "message": "string"
  }
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
field	String	Name of the field that has errors.	Small, 60.0	60.0
message	String	Error message for the failed process.	Small, 60.0	60.0

Gift Campaign Default Designations Output

Output representation of a list of default designations associated with a gift campaign record.

JSON example

```
{
  "campaignDefaultDesignations": [
    {
      "designationId": "6gdRM000000000LYAQ",
      "designationName": "Default Designation",
      "percent": 50
    },
    {
      "designationId": "6gdxx000004WhULAA0",
      "designationName": "Other Designation",
      "percent": 50
    }
  ]
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
campaignDefaultDesignations	Gift Campaign Default Designation Record Output[]	List of default gift designations associated with a gift campaign record.	Small, 59.0	59.0

Gift Campaign Default Designation Record Output

Output representation of a default designation record associated with a gift campaign.

Property Name	Type	Description	Filter Group and Version	Available Version
designationId	String	ID of the default gift designation record.	Small, 59.0	59.0
designationName	String	The name of the gift designation	Small, 66.0	66.0
percentage	Double	Percentage value of the default gift designation record.	Small, 59.0	59.0

Gift Commitment Default Designations Output

Output representation of a list of default designations associated with a gift commitment.

JSON example

```
{
  "commitmentDefaultDesignations": [
    {
      "designationId": "6idRM000000000LYAQ",
      "percent": 100
    },
    {
      "designationId": "6gaxx000004WhULAA0",
      "percent": 50
    }
  ]
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
commitmentDefaultDesignations	Gift Commitment Default Designation Record Output	List of default gift designations associated with a gift commitment.	Small, 59.0	59.0

Gift Commitment Default Designation Record Output

Output representation of a default designation record associated with a gift commitment.

Property Name	Type	Description	Filter Group and Version	Available Version
designationId	String	ID of the default gift designation record.	Small, 59.0	59.0
designationName	String	The name of the gift designation	Small, 66.0	66.0
percentage	Double	Percentage value of the default gift designation record.	Small, 59.0	59.0

Gift Commitment Transaction Matching Output

Output representation of a list of gift transactions.

JSON example

```
{
  "giftTransactions": [
    {
      "fields": [
        {
          "fieldApiName": "GiftCommitmentId",
          "label": "Gift Commitment ID",
          "type": "String",
          "value": "6gcRM0000004CD0YAM"
        },
        {

```

```

        "fieldApiName": "Id",
        "label": "Gift Transaction ID",
        "type": "String",
        "value": "6trRM00000000CwYAI"
    },
    {
        "fieldApiName": "Name",
        "label": "Name",
        "type": "String",
        "value": "Tom C3 - Tom C3 GT 7"
    },
    {
        "fieldApiName": "GiftType",
        "label": "Gift Type",
        "type": "String",
        "value": "Individual"
    },
    {
        "fieldApiName": "TransactionDueDate",
        "label": "Transaction Due Date",
        "type": "DateOnlyWrapper",
        "value": "Thu Aug 31 00:00:00 GMT 2023"
    },
    {
        "fieldApiName": "DonorId",
        "label": "Donor ID",
        "type": "String",
        "value": "001RM000005bZRUYA2"
    },
    {
        "fieldApiName": "OwnerId",
        "label": "Owner ID",
        "type": "String",
        "value": "005RM0000027gL8YAI"
    },
    {
        "fieldApiName": "RefundedAmount",
        "label": "Refunded Amount",
        "type": "Double",
        "value": "0.0"
    },
    {
        "fieldApiName": "Status",
        "label": "Status",
        "type": "String",
        "value": "Unpaid"
    },
    {
        "fieldApiName": "IsDeleted",
        "label": "Deleted",
        "type": "Boolean",
        "value": "false"
    },
    {

```

```

        "fieldApiName": "IsPartiallyRefunded",
        "label": "Partially Refunded",
        "type": "Boolean",
        "value": "false"
    },
    {
        "fieldApiName": "CurrentAmount",
        "label": "Current Amount",
        "type": "Double",
        "value": "2.2222222E7"
    },
    {
        "fieldApiName": "AcknowledgementStatus",
        "label": "Acknowledgement Status",
        "type": "String",
        "value": "To Be Sent"
    },
    {
        "fieldApiName": "OriginalAmount",
        "label": "Original Amount",
        "type": "Double",
        "value": "2.2222222E7"
    },
    {
        "fieldApiName": "IsWrittenOff",
        "label": "Written Off",
        "type": "Boolean",
        "value": "false"
    },
    {
        "fieldApiName": "IsFullyRefunded",
        "label": "Fully Refunded",
        "type": "Boolean",
        "value": "false"
    },
    {
        "fieldApiName": "PaymentMethod",
        "label": "Payment Method",
        "type": "String",
        "value": "Cash"
    },
    {
        "fieldApiName": "IsPaid",
        "label": "Paid",
        "type": "Boolean",
        "value": "false"
    }
],
"objectApiName": "GiftTransaction"
},
{
    "fields": [
        {
            "fieldApiName": "GiftCommitmentId",

```

```

        "label": "Gift Commitment ID",
        "type": "String",
        "value": "6gcRM0000004CD0YAM"
    },
    {
        "fieldApiName": "Id",
        "label": "Gift Transaction ID",
        "type": "String",
        "value": "6trRM00000000CxYAI"
    },
    {
        "fieldApiName": "Name",
        "label": "Name",
        "type": "String",
        "value": "Tom C3 - Tom C3 GT 6"
    },
    {
        "fieldApiName": "GiftType",
        "label": "Gift Type",
        "type": "String",
        "value": "Individual"
    },
    {
        "fieldApiName": "TransactionDueDate",
        "label": "Transaction Due Date",
        "type": "DateOnlyWrapper",
        "value": "Wed Aug 30 00:00:00 GMT 2023"
    },
    {
        "fieldApiName": "DonorId",
        "label": "Donor ID",
        "type": "String",
        "value": "001RM000005bZRUYA2"
    },
    {
        "fieldApiName": "OwnerId",
        "label": "Owner ID",
        "type": "String",
        "value": "005RM0000027gL8YAI"
    },
    {
        "fieldApiName": "RefundedAmount",
        "label": "Refunded Amount",
        "type": "Double",
        "value": "0.0"
    },
    {
        "fieldApiName": "Status",
        "label": "Status",
        "type": "String",
        "value": "Unpaid"
    },
    {
        "fieldApiName": "IsDeleted",

```

```

        "label": "Deleted",
        "type": "Boolean",
        "value": "false"
    },
    {
        "fieldApiName": "IsPartiallyRefunded",
        "label": "Partially Refunded",
        "type": "Boolean",
        "value": "false"
    },
    {
        "fieldApiName": "CurrentAmount",
        "label": "Current Amount",
        "type": "Double",
        "value": "11111.0"
    },
    {
        "fieldApiName": "AcknowledgementStatus",
        "label": "Acknowledgement Status",
        "type": "String",
        "value": "To Be Sent"
    },
    {
        "fieldApiName": "OriginalAmount",
        "label": "Original Amount",
        "type": "Double",
        "value": "11111.0"
    },
    {
        "fieldApiName": "IsWrittenOff",
        "label": "Written Off",
        "type": "Boolean",
        "value": "false"
    },
    {
        "fieldApiName": "IsFullyRefunded",
        "label": "Fully Refunded",
        "type": "Boolean",
        "value": "false"
    },
    {
        "fieldApiName": "PaymentMethod",
        "label": "Payment Method",
        "type": "String",
        "value": "Cash"
    },
    {
        "fieldApiName": "IsPaid",
        "label": "Paid",
        "type": "Boolean",
        "value": "false"
    }
],
"objectApiName": "GiftTransaction"

```

```

    }
  ]
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
giftTransactions	Standard Object Details[]	List of gift transactions associated with a gift commitment.	Small, 59.0	59.0

Gift Transactions Output

Output representation of the gift transactions associated with a gift commitment record.

JSON examples

Here's an example of a list of future gift transactions.

```

{
  "giftTransactions": [
    {
      "amount": 9999,
      "commitmentId": "6gcxx000004WhULAA0",
      "commitmentScheduleId": "6csxx000004WhULAA0",
      "paymentMethod": "Cash",
      "transactionDate": "2023-09-01T00:00:00.000Z"
    },
    {
      "amount": 2099,
      "commitmentId": "6gcxx000004WhULAA0",
      "commitmentScheduleId": "6csxx000004UhUMAB0",
      "paymentMethod": "Cash",
      "transactionDate": "2023-10-01T00:00:00.000Z"
    }
  ]
}

```

Here's an example of a list of past gift transactions.

```

{
  "giftTransactions": [
    {
      "amount": 9999,
      "commitmentId": "6gcxx000004WhULAA0",
      "commitmentScheduleId": "6csxx000004WhULAA0",
      "paymentMethod": "Cash",
      "status": "Canceled"
    },
    {
      "amount": 2099,
      "commitmentId": "6gcxx000004WhULAA0",
      "commitmentScheduleId": "6csxx000004UhUMAB0",
      "paymentMethod": "Cash",
      "status": "Canceled"
    }
  ]
}

```

```

    }
  ]
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
gift Transactions	Gift Transaction Record Output[]	List of gift transactions associated with a gift commitment record.	Small, 59.0	59.0

Gift Transaction Linked Designations Output

Output representation of a list of gift designations.

JSON example

```

{
  "transactionLinkedDesignations": [
    {
      "amount":100,
      "designationId":"6gdRM000000000LYAQ",
      "percent":100
    },
    {
      "amount":100,
      "designationId":"6gcxx000004WhULAA0",
      "percent":50
    }
  ]
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
transactionLinkedDesignations	Gift Designation Record Output[]	List of designations.	Small, 59.0	59.0

Gift Transaction Record Output

Output representation of a gift transaction record.

Property Name	Type	Description	Filter Group and Version	Available Version
amount	Double	Transaction amount.	Small, 59.0	59.0
commitmentId	String	ID of the gift commitment record.	Small, 59.0	59.0
commitment ScheduleId	String	ID of the gift commitment schedule record.	Small, 59.0	59.0
paymentMethod	String	Mode of payment for the transaction.	Small, 59.0	59.0

Property Name	Type	Description	Filter Group and Version	Available Version
status	String	Status of the transaction. This field is not applicable for future transactions.	Small, 59.0	59.0
transaction Date	String	Payment due date. This field is applicable only for future transactions.	Small, 59.0	59.0

Gift Designation Record Output

Output representation of a gift designation record.

Property Name	Type	Description	Filter Group and Version	Available Version
amount	Double	Amount value of the designation record.	Small, 59.0	59.0
designationId	String	ID of the designation record.	Small, 59.0	59.0
percent	Double	Percentage value of the designation record.	Small, 59.0	59.0

Link Details

Output representation of the link details for the response object.

Sample Response

```
{
  "href": "/services/data/vXX.X/subjects/sObject/...",
  "id": "string"
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
href	String	Object link that provides the direct access to the resource.	Small, 60.0	60.0
id	String	Salesforce ID of the linked resource.	Small, 60.0	60.0

Transaction Payment Updates

Output representation of the transaction payment updates.

Sample Response

```
{
  "successes": 0,
}
```



```

    "failures": 0,
    "notProcessed": 0,
    "details": [
      {
        "success": true,
        "errors": [
          {
            "field": "string",
            "message": "string"
          }
        ],
        "links": {
          "gifttransaction": {
            "href": "/services/data/vXX.X/subjects/sObject/...",
            "id": "string"
          }
        }
      }
    ]
  }
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
details	Transaction Payment Updates Response[]	Payment update response of the transaction.	Small, 60.0	60.0
failures	Integer	Number of gift transactions that failed to update.	Small, 60.0	60.0
notProcessed	Integer	Number of gift transactions that weren't processed.	Small, 60.0	60.0
successes	Integer	Number of gift transactions that were updated.	Small, 60.0	60.0

Transaction Payment Updates Response

Output representation of the updates for the transaction payment.

Sample Response

```

{
  "details": [
    {
      "success": true,
      "errors": [
        {
          "field": "string",
          "message": "string"
        }
      ],
      "links": {
        "gifttransaction": {

```

```

        "href": "/services/data/vXX.X/subjects/sObject/...",
        "id": "string"
      }
    }
  ]
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
errors	Error Details[]	Error message if a process failed.	Small, 60.0	60.0
links	Transaction Payment Updates Response Link	Links to the response object.	Small, 60.0	60.0
success	Boolean	Indicates whether a request was processed successfully (<code>true</code>) or not (<code>false</code>).	Small, 60.0	60.0

Transaction Payment Updates Response Link

Output representation of the links to the response object for the transaction payment updates.

Sample Response

```

{
  "gifttransaction": {
    "href": "/services/data/vXX.X/subjects/sObject/...",
    "id": "string"
  }
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
gift transaction	Link Details	Link to the gift transaction details.	Small, 60.0	60.0

Update Commitment

Output representation of the update commitment request that contains the status, errors if any, and the links to objects after you update a gift commitment.

Sample Response

```

{
  "success": true,
  "errors": [
    {
      "field": "string",
      "message": "string"
    }
  ]
}

```

```

    ],
    "links": {
      "giftcommitment": {
        "href": "/services/data/vXX.X/subjects/sObject/...",
        "id": "string"
      },
      "giftcommitmentschedule": {
        "href": "/services/data/vXX.X/subjects/sObject/...",
        "id": "string"
      }
    }
  }
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
errors	Error Details[]	Error message if the process failed.	Small, 60.0	60.0
links	Update Commitment Response Link	Links to the response object.	Small, 60.0	60.0
success	Boolean	Indicates whether the request was processed successfully (<code>true</code>) or not (<code>false</code>).	Small, 60.0	60.0

Update Commitment Response Link

Output representation of the links to the response object for the commitment updates.

Sample Response

```

{
  "giftcommitment": {
    "href": "/services/data/vXX.X/subjects/sObject/...",
    "id": "string"
  },
  "giftcommitmentschedule": {
    "href": "/services/data/vXX.X/subjects/sObject/...",
    "id": "string"
  }
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
gift commitment	Link Details	Link to the updated gift commitment details.	Small, 60.0	60.0
giftcommitment schedule	Link Details	Link to the schedule associated with the updated gift commitment.	Small, 60.0	60.0

Fundraising Invocable Actions

Use actions to add more functionality to your applications. Choose from standard actions, such as processing gift entries, update processed gift entries, manage gift default designations, and manage gift transaction designations.

To know more about invocable actions, see [Actions Developer Guide](#) and [REST API Developer Guide](#).

[Close Gift Commitment Action](#)

Updates the status of a gift commitment to closed and updates the status for each of its unpaid and failed gift transactions.

[Manage Custom Gift Commitment Schedules Action](#)

Creates or updates up to 15 custom gift commitment schedule records and their associated gift transaction records.

[Manage Gift Default Designations Action](#)

Creates and manages Gift Default Designation records for a gift entry associated with a campaign, opportunity, or gift commitment.

[Manage Gift Transaction Designations Action](#)

Creates and manages Gift Transaction Designation records for a gift transaction.

[Manage Recurring Gift Commitment Schedule Action](#)

Creates or updates a recurring type of gift commitment schedule record and creates the first upcoming gift commitment transaction record.

[Process Gift Entries Action](#)

Processes, singly or as part of a batch, a specified gift entry ID, creating related donor, gift transaction, gift transaction designation, and gift soft credit records. You may also test gift entry processing to check for errors before creating related records.

[Pause Gift Commitment Schedule Action](#)

Pauses a gift commitment schedule for a specified period of time.

[Process Gift Commitment Action](#)

Updates the status and other relevant fields for a gift commitment based on the statuses of the associated gift transactions and the current gift commitment schedule.

[Resume Gift Commitment Schedule Action](#)

Resumes a paused gift commitment schedule on a specified date.

[Update Processed Gift Entries Action](#)

Updates the status of a specified gift entry record that is already processed. If the processing fails, the failure reason is updated.

Close Gift Commitment Action

Updates the status of a gift commitment to closed and updates the status for each of its unpaid and failed gift transactions.

This action is available in API version 59.0 and later for users in orgs where the Fundraising Access license is enabled and the Fundraising User system permission is assigned.

Supported REST HTTP Methods

URI

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

Formats

JSON

HTTP Methods

POST

AuthenticationAuthorization: Bearer *token*

Inputs

Input	Details
giftCommitmentId	Type String Description Required. The ID of the gift commitment record to be closed.

Outputs

None.

Example

Here's a request for the Close Gift Commitment action.

```
{
  "inputs": [
    {
      "giftCommitmentId": "6gcNA000000YshCYAS"
    }
  ]
}
```

Here's a response for the Close Gift Commitment action.

```
[
  {
    "actionName": "closeGiftCommitment",
    "errors": null,
    "isSuccess": true,
    "outputValues": null,
    "version": 1
  }
]
```

Manage Custom Gift Commitment Schedules Action

Creates or updates up to 15 custom gift commitment schedule records and their associated gift transaction records.

This action is available in API version 59.0 and later for users in orgs where the Fundraising Access license is enabled and the Fundraising User system permission is assigned.

Supported REST HTTP Methods

URI

/services/data/v~~XX~~.X/actions/standard/manageCustomGiftCmtSchds

Formats

JSON

HTTP Methods

POST

Authentication

Authorization: Bearer *token*

Inputs

Input	Details
giftCommitmentSchedules	Type sObject Description Required. A collection of gift commitment schedule records to be created or updated.

Outputs

Input	Details
giftCommitmentScheduleList	Type String Description A comma-delimited list of gift commitment schedule IDs records that the action created or updated.

Example

Here's a request for the Manage Custom Gift Commitment Schedules action.

```
{
  "inputs": [
    {
      "giftCommitmentSchedules": [
        {
          "StartDate": "2023-08-26",
          "PaymentMethod": "Check",
          "Id": "6csNA000000hbx8YAA",
          "EndDate": "2023-08-28"
        }
      ],
    }
  ],
}
```

```

    {
      "StartDate": "2023-08-29",
      "PaymentMethod": "Check",
      "Id": "6csNA000000hby4YAA",
      "EndDate": "2023-08-30"
    }
  ]
}

```

Here's a response for the Manage Custom Gift Commitment Schedules action.

```

[
  {
    "actionName": "manageCustomGiftCmtSchds",
    "errors": null,
    "isSuccess": true,
    "outputValues": {
      "giftCommitmentScheduleIdsList": [
        "6csNA000000hbx8YAA",
        "6csNA000000hby4YAA"
      ]
    },
    "version": 1
  }
]

```

Manage Gift Default Designations Action

Creates and manages Gift Default Designation records for a gift entry associated with a campaign, opportunity, or gift commitment.

This action is available in API version 59.0 and later for users in orgs where the Fundraising Access license is enabled and the Fundraising User system permission is assigned.

Supported REST HTTP Methods

URI

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

Formats

JSON, XML

HTTP Methods

POST

Authentication

Authorization: Bearer **token**

Inputs

Input	Details
giftDefaultDesignationIds	Type sObject Description Required. A collection of Gift Default Designation record IDs that are to be modified or deleted.
parentRecordId	Type ID Description Required. The ID of the parent record like a campaign, opportunity, or gift commitment associated with the gift default designation IDs in <code>giftDefaultDesignationIds</code>.

Outputs

None.

Example

Here's a request for the Manage Gift Default Designations action.

```
{
  "inputs": [
    {
      "giftDefaultDesignationIds": [
        {
          "GiftDesignationId": "6gdRM0000004CD0YAM",
          "AllocatedPercentage": 100
        }
      ]
    }
  ],
  "parentRecordId": "6gcRM00000001UNYAY"
}
```

Here's a response for the Manage Gift Default Designations action.

```
[
  {
    "actionName": "manageGiftDefaultDesignations",
    "errors": null,
    "isSuccess": true,
    "outputValues": null,
    "version": 1
  }
]
```



```
}
]
```

Manage Gift Transaction Designations Action

Creates and manages Gift Transaction Designation records for a gift transaction.

This action is available in API version 59.0 and later for users in orgs where the Fundraising Access license is enabled and the Fundraising User system permission is assigned.

Supported REST HTTP Methods

- URI**
/services/data/v~~XX~~.X/actions/standard/manageGiftTrxnDesignations
- Formats**
JSON, XML
- HTTP Methods**
POST
- Authentication**
Authorization: Bearer *token*

Inputs

Input	Details
giftTransactionDesignations	Type sObject Description Required. A collection of Gift Transaction Designation record IDs that are to be modified or deleted.
recordId	Type ID Description Required. The record for which the Gift Transaction Designation record is created. For example, Gift Transaction.

Outputs

None.

Example

Here's a request for the Manage Gift Transaction Designations action.

```
{
  "inputs": [
    {
      "giftTransactionDesignations": [
        {
          "GiftDesignationId": "6gdRM0000004CDAYA2",
          "Percent": 100,
          "Amount": 76
        }
      ]
    }
  ],
  "recordId": "6trRM00000003PJYAY"
}
```

Here's a response for the Manage Gift Transaction Designations action.

```
[
  {
    "actionName": "manageGiftTrxnDesignations",
    "errors": null,
    "isSuccess": true,
    "outputValues": null,
    "version": 1
  }
]
```

Manage Recurring Gift Commitment Schedule Action

Creates or updates a recurring type of gift commitment schedule record and creates the first upcoming gift commitment transaction record.

This action is available in API version 59.0 and later for users in orgs where the Fundraising Access license is enabled and the Fundraising User system permission is assigned.

Supported REST HTTP Methods

URI

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

Formats

JSON, XML

HTTP Methods

POST

Authentication

Authorization: Bearer *token*

Inputs

Input	Details
<code>effectiveFromDate</code>	Type Date Description The date from when the updates to the gift commitment schedule are effective. Only applicable in a schedule update scenario.
<code>effectiveToDate</code>	Type Date Description The date until when the updates to the gift commitment schedule are effective. Only applicable in a schedule update scenario.
<code>giftCommitmentSchedule</code>	Type sObject Description Required. The gift commitment schedule record to be created or updated.
<code>PaymentInstrument</code>	Type sObject Description Required. The payment instrument record to be created or updated.

Outputs

Input	Details
<code>giftCommitmentScheduleIdsList</code>	Type Date Description A comma-delimited list of gift commitment schedule IDs for schedules that were created or updated.

Example

Here's a request for the Manage Recurring Gift Commitment Schedule action.

```
{
  "inputs": [
    {
      "giftCommitmentSchedules": [
        {
          "StartDate": "2023-08-26",
          "PaymentMethod": "Check",
          "Id": "6csNA000000hbx8YAA",
          "EndDate": "2023-08-28"
        },
        {
          "StartDate": "2023-08-29",
          "PaymentMethod": "Check",
          "Id": "6csNA000000hby4YAA",
          "EndDate": "2023-08-30"
        }
      ],
      "paymentInstrument": {
        "Last4": "1234",
        "Type": "Credit Card",
        "ExpiryMonth": "May",
        "ExpiryYear": "29"
      }
    }
  ]
}
```

Here's a response for the Manage Recurring Gift Commitment Schedule action.

```
[
  {
    "actionName": "manageRcrGiftCmtSchd",
    "errors": null,
    "isSuccess": true,
    "outputValues": {
      "giftCommitmentScheduleIdsList": [
        "6csNA000000hbx8YAA",
        "6csNA000000hby4YAA"
      ]
    },
    "version": 1
  }
]
```

Process Gift Entries Action

Processes, singly or as part of a batch, a specified gift entry ID, creating related donor, gift transaction, gift transaction designation, and gift soft credit records. You may also test gift entry processing to check for errors before creating related records.

This action is available in API version 59.0 and later for users in orgs where the Fundraising Access license is enabled and the Fundraising User system permission is assigned.

Supported REST HTTP Methods

URI

/services/data/v`XX.X`/actions/standard/processGiftEntries

Formats

JSON, XML

HTTP Methods

POST

Authentication

Authorization: Bearer *token*

Inputs

Input	Details
giftEntryId	Type ID Description Required. The ID of the gift entry record to be processed.
isDryRun	Type Boolean Description Indicates whether to run the action without creating or updating records to determine if there are any errors (<code>true</code>) or actual processing (<code>false</code>). The default value is <code>false</code> .

Outputs

Output	Details
donorId	Type ID Description The ID of the person, household, or organization account that's associated with the gift entry.
giftEntryId	Type ID Description The ID of the gift entry record that is processed.

Output	Details
giftProcessingErrorDetails	Type String Description The error details when the gift processing status is <code>Failure</code>.
giftProcessingStatus	Type String Description The processing status of the gift entry. Valid values are: • <code>Failure</code> • <code>New</code> • <code>Success</code>
giftTransactionId	Type ID Description The ID of the gift transaction that's associated with the gift entry.

Example

Here's a request for the Process Gift Entries action for processing a gift entry.

```
{
  "inputs": [
    {
      "giftEntryId": "6geRM00000000GdYAI"
    }
  ]
}
```

Here's a response for the Process Gift Entries action for processing a gift entry.

```
[
  {
    "actionName": "processGiftEntries",
    "errors": null,
    "isSuccess": true,
    "outputValues": {
      "giftProcessingStatus": "SUCCESS",
      "giftEntryId": "6geRM00000000GdYAI",
      "giftTransactionId": "6trRM000000003PJ",
      "giftProcessingErrorDetails": null,
      "donorId": "001RM000005ewDDYAY"
    },
    "version": 1
  }
]
```

```
}
]
```

Here's a request for the Process Gift Entries action for a dry run of gift entry processing.

```
{
  "inputs": [
    {
      "giftEntryId": "6geRM00000000GdYAI",
      "isDryRun": "true",
    }
  ]
}
```

Here's a response for the Process Gift Entries action for a dry run of gift entry processing.

```
[
  {
    "actionName": "processGiftEntries",
    "errors": null,
    "isSuccess": true,
    "outputValues": {
      "giftProcessingStatus": "New",
      "giftEntryId": "6geRM00000000GdYAI",
      "giftTransactionId": null,
      "giftProcessingErrorDetails": null,
      "donorId": null
    },
    "version": 1
  }
]
```

Pause Gift Commitment Schedule Action

Pauses a gift commitment schedule for a specified period of time.

This action is available in API version 59.0 and later for users in orgs where the Fundraising Access license is enabled and the Fundraising User system permission is assigned.

Supported REST HTTP Methods

URI

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

Formats

JSON, XML

HTTP Methods

POST

Authentication

Authorization: Bearer **token**

Inputs

Input	Details
endDate	Type Date Description The date to resume the gift commitment schedule.
giftCommitmentScheduleId	Type String Description Required. The ID of the gift commitment schedule record to be paused.
startDate	Type Date Description The date to pause the gift commitment schedule.
updateReason	Type String Description The reason the gift commitment schedule is to be paused.

Outputs

Input	Details
giftCommitmentScheduleIdsList	Type String Description A comma-delimited list of gift commitment schedule IDs for schedules that were created or updated.

Example

Here's a request for the Pause Gift Commitment Schedule action.

```
{
  "inputs": [
    {
      "giftCommitmentScheduleId": "6csNA000000YNbOYAW",
      "startDate": "2023-08-25"
    }
  ]
}
```



```
    }
  ]
}
```

Here's a response for the Pause Gift Commitment Schedule action.

```
[
  {
    "actionName": "pauseGiftCommitmentSchedule",
    "errors": null,
    "isSuccess": true,
    "outputValues": {
      "giftCommitmentScheduleIdsList": [
        "6csNA000000YNbOYAW",
        "6csNA000000hbXuYAA"
      ]
    },
    "version": 1
  }
]
```

Process Gift Commitment Action

Updates the status and other relevant fields for a gift commitment based on the statuses of the associated gift transactions and the current gift commitment schedule.

This action is available in API version 59.0 and later for users in orgs where the Fundraising Access license is enabled and the Fundraising User system permission is assigned.

Supported REST HTTP Methods

URI

/services/data/v~~XX.X~~/actions/standard/processGiftCommitment

Formats

JSON, XML

HTTP Methods

POST

Authentication

Authorization: Bearer *token*

Inputs

Input	Details
giftCommitmentId	Type String Description Required. The ID of the gift commitment record to be processed.

Outputs

Input	Details
giftCommitmentProcessingStatus	Type String Description The status of the gift commitment record after it is processed.

Example

Here's a request for the Process Gift Commitment action.

```
{
  "inputs": [
    {
      "giftCommitmentId": "6gcNA000000PeKhYAK"
    }
  ]
}
```

Here's a response for the Process Gift Commitment action.

```
[
  {
    "actionName": "processGiftCommitment",
    "errors": null,
    "isSuccess": true,
    "outputValues": null,
    "version": 1
  }
]
```

Resume Gift Commitment Schedule Action

Resumes a paused gift commitment schedule on a specified date.

This action is available in API version 59.0 and later for users in orgs where the Fundraising Access license is enabled and the Fundraising User system permission is assigned.

Supported REST HTTP Methods

URI

/services/data/v~~xx~~.~~x~~/actions/standard/resumeGiftCommitmentSchedule

Formats

JSON, XML

HTTP Methods

POST

Authentication

Authorization: Bearer *token*

Inputs

Input	Details
giftCommitmentScheduleId	Type String Description Required. The ID of the gift commitment schedule record to be resumed.
resumeDate	Type Date Description The date to resume the gift commitment schedule.
updateReason	Type String Description The reason the gift commitment schedule is to be resumed.

Outputs

Input	Details
giftCommitmentScheduleIdsList	Type String Description A comma-delimited list of gift commitment schedule IDs for schedules that were created or updated.

Example

Here's a request for the Resume Gift Commitment Schedule action.

```
{
  "inputs": [
    {
      "giftCommitmentScheduleId": "6csNA000000hbxpYAA",
      "resumeDate": "2023-08-27"
      "updateReason": "Test"
    }
  ]
}
```

```
  ]
}
```

Here's a response for the Resume Gift Commitment Schedule action.

```
[
  {
    "actionName": "resumeGiftCommitmentSchedule",
    "errors": null,
    "isSuccess": true,
    "outputValues": {
      "giftCommitmentScheduleIdsList": [
        "6csNA000000hbxpYAA"
      ]
    },
    "version": 1
  }
]
```

Update Processed Gift Entries Action

Updates the status of a specified gift entry record that is already processed. If the processing fails, the failure reason is updated.

This action is available in API version 59.0 and later for users in orgs where the Fundraising Access license is enabled and the Fundraising User system permission is assigned.

Supported REST HTTP Methods

- URI**
`/services/data/vXX.X/actions/standard/updateProcessedGiftEntries`
- Formats**
JSON, XML
- HTTP Methods**
POST
- Authentication**
Authorization: Bearer *token*

Inputs

Input	Details
donorId	Type ID Description The ID of the account of the donor that is updated when giftProcessingStatus is Success.
giftEntryId	Type ID

Input	Details
	Description Required. The ID of the gift entry record to be updated.
giftProcessingErrorDetails	Type String Description The error details when giftProcessingStatus is Failure.
giftProcessingStatus	Type String Description The processing status of the gift entry. Valid values are: • Failure • New • Success
giftTransactionId	Type ID Description The ID of the gift transaction record associated with the gift entry that is to be updated when giftProcessingStatus is Success.

Outputs

Field	Details
giftEntryId	Type ID Description The ID of the gift entry record that is updated.

Example

Here's a request for the Update Processed Gift Entries action.

```
{
  "inputs": [
    {
      "donorId": "001RM000005ewDDYAY",
```

```

    "giftEntryId": "6geRM00000000GdYAI",
    "giftProcessingErrorDetails": null,
    "giftProcessingStatus": "SUCCESS",
    "giftTransactionId": "6trRM000000003PJ"
  }
]
}

```

Here's a response for the Update Processed Gift Entries action.

```

[
  {
    "actionName": "updateProcessedGiftEntries",
    "errors": null,
    "isSuccess": true,
    "outputValues": {
      "giftEntryId": "6geRM00000000GdYAI"
    },
    "version": 1
  }
]

```

Fundraising 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](#).

[AffinityScoreDefinition](#)

Represents the affinity information used in calculations to analyze and categorize contacts for marketing purposes.

[Flow for Fundraising](#)

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.

AffinityScoreDefinition

Represents the affinity information used in calculations to analyze and categorize contacts for marketing purposes.



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

AffinityScoreDefinition components have the suffix `.affinityScoreDefinition` and are stored in the `affinityScoreDefinitions` folder.

Version

AffinityScoreDefinition components are available in API version 66.0 and later.

Special Access Rules

This metadata type is available only if the Fundraising Access license is enabled for the org and the Fundraising admin permission is assigned to users.

Fields

Field Name	Description
<code>affinityScoreDefinitionDesc</code>	Field Type string Description Description of the affinity score definition.
<code>affinityScoreDefinitionName</code>	Field Type string Description Name of the affinity score definition.
<code>affinityScoreType</code>	Field Type AffinityScoreType (enumeration of type string) Description Type of the affinity score that's defined. Valid values are: • CAP—Capacity, Ability, Propensity (CAP) • RFM—Recency, Frequency, Monetary (RFM) The default value is RFM.
<code>masterLabel</code>	Field Type string Description Label for this affinity score definition value. This display value is the internal label that doesn't get translated.
<code>numberOfMonths</code>	Field Type int

Field Name	Description
	Description Number of months to analyze the records for calculating the affinity score.
numberOfRanges	Field Type int Description Required. Number of ranges to use in the calculation, ranging from 0 to 9. Provide the corresponding range list values in the <code>scoreRangeList</code> field.
scoreRangeList	Field Type string Description Required. Ranges that are referenced in the affinity score calculation. This field is used with <code>scoreRangeList</code> . For example, to calculate RFM with <code>numberOfRanges</code> value as 3, provide the values for the <code>scoreRangeList</code> field in this format. <pre>{ "R ranges": "0-30, 31-100, 100+", "F ranges": "0-10, 11-100, 100+", "M ranges": "0-1000, 1001-5000, 5000+" }</pre>
sourceFieldApiNameList	Field Type string Description Required. API names of the source fields that are referenced in the score calculation.
sourceObjectApiNameList	Field Type string Description API names of the source objects that are referenced in the score calculation.
targetFieldApiNameList	Field Type string Description Required. API names of the target fields where the calculated scores are added.

Field Name	Description
targetObjectApiName	Field Type string API name of the target object where the calculated scores are added.

Declarative Metadata Sample Definition

This example shows a sample of an AffinityScoreDefinition component.

```
<?xml version="1.0" encoding="UTF-8"?>
<AffinityScoreDefinition
  xmlns="http://soap.sforce.com/2006/04/metadata">
  <affinityScoreDefinitionDesc>RFM Affinity Score</affinityScoreDefinitionDesc>
  <affinityScoreDefinitionName>AffinityScoreDefinition_RFM</affinityScoreDefinitionName>
  <affinityScoreType>RFM</affinityScoreType>
  <masterLabel>MasterLabel</masterLabel>
  <numberOfMonths>12</numberOfMonths>
  <numberOfRanges>3</numberOfRanges>
  <scoreRangeList>
    [
      {
        "name": "R Ranges",
        "direction": "ascending",
        "ranges": [30,90,180]
      },
      {
        "name": "F Ranges",
        "direction": "descending",
        "ranges": [10,15,100]
      },
      {
        "name": "M Ranges",
        "direction": "descending",
        "ranges": [500,1000,5000]
      }
    ]
  </scoreRangeList>
  <sourceFieldApiNameList>
    [
      {
        "name": "R Source",
        "values":
          [
            {
              "fieldName": "DonorGiftSummary.DaysSinceLastGift",
              "fieldWeight": 1
            }
          ]
      },
      {
        "name": "F Source",
```

```

        "values":
          [
            {
              "fieldName": "DonorGiftSummary.GiftCount",
              "fieldWeight": 1
            }
          ]
      },
      {
        "name": "M Source",
        "values":
          [
            {
              "fieldName": "DonorGiftSummary.TotalGiftsCount",
              "fieldWeight": 1
            }
          ]
      }
    ]
  </sourceFieldApiNameList>
  <targetFieldApiNameList>
    [
      {
        "name": "R Target",
        "values":
          [
            {
              "fieldName": "DonorGiftSummary.RecencyScore",
              "fieldWeight": 1
            }
          ]
      },
      {
        "name": "F Target",
        "values":
          [
            {
              "fieldName": "DonorGiftSummary.FrequencyScore",
              "fieldWeight": 1
            }
          ]
      },
      {
        "name": "M Target",
        "values":
          [
            {
              "fieldName": "DonorGiftSummary.MonetaryScore",
              "fieldWeight": 1
            }
          ]
      }
    ]
  ]

```

```

        </targetFieldApiNameList>
    </AffinityScoreDefinition>

```

This example shows a sample of the `package.xml` file 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>AffinityScoreDefinition</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](#).

Flow for Fundraising

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

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

Field Name	Field Type	Description
<code>actionType</code>	InvokableActionType (enumeration of type string)	Required. The action type. Additional valid values only for Business Rules Engine include: <code>closeGiftCommitment</code>—Updates the status of a gift commitment to closed and updates the status for each of its unpaid and failed gift transactions. This value is available in API version 59.0 and later. <code>manageCustomGiftCmtSchds</code>—Creates or updates up to 15 custom gift commitment schedule records and their associated gift transaction records. This value is available in API version 59.0 and later. <code>manageFundraisingDefinitions</code>—Runs up to three predefined Data Processing Engine (DPE) definitions in a single action. Use this invocable action to process the Donor Gift Summary, Outreach Summary, and Gift Designation definitions. This value is available in API version 64.0 and later. <code>manageGiftDefaultDesignations</code>—Creates and manages Gift Default Designation records for a gift entry associated with a

Field Name	Field Type	Description
		campaign, opportunity, or gift commitment. This value is available in API version 59.0 and later.
		• <code>manageGiftTrxnDesignations</code>—Creates and manages Gift Transaction Designation records for a gift transaction. This value is available in API version 59.0 and later. • <code>manageRcrGiftCmtSchd</code>—Creates or updates a recurring type of gift commitment schedule record and creates the first upcoming gift commitment transaction record. This value is available in API version 59.0 and later. • <code>processGiftEntries</code>—Processes, singly or as part of a batch, a specified gift entry ID, creating related donor, gift transaction, gift transaction designation, and gift soft credit records. This value is available in API version 59.0 and later. • <code>pauseGiftCommitmentSchedule</code>—Pauses a gift commitment schedule for a specified period of time. This value is available in API version 59.0 and later. • <code>processGiftCommitment</code>—Updates the status and other relevant fields for a gift commitment based on the statuses of the associated gift transactions and the current gift commitment schedule. This value is available in API version 59.0 and later. • <code>resumeGiftCommitmentSchedule</code>—Resumes a paused gift commitment schedule on a specified date. This value is available in API version 59.0 and later. • <code>updateProcessedGiftEntries</code>—Updates the status of a specified gift entry record that is already processed. If the processing fails, the failure reason is updated. This value is available in API version 59.0 and later.

Fundraising Tooling API Objects

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

For more information about Tooling API objects and to find a complete reference of all the supported objects, see [Introducing Tooling API](#).

[FundraisingConfig](#)

Represents a collection of settings to configure Fundraising. This object is available in API version 59.0 and later.

[FieldMappingConfig](#)

Represents the configuration for fields mapped between a source object and one or more destination objects and fields. This object is available in API version 63.0 and later.

[FieldMappingConfigItem](#)

Represents the fields mapped between a defined source object and the destination object and fields. This object is available in API version 63.0 and later.

[GiftEntryGridTemplate](#)

Represents templates that customize the gift entry grid in Fundraising. Available in API version 66.0 and later.

FundraisingConfig

Represents a collection of settings to configure Fundraising. This object is available in API version 59.0 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()`, `describeObjects()`, `query()`, `retrieve()`, `update()`, `upsert()`

Supported REST API Methods

DELETE, GET, HEAD, PATCH, POST, Query

Special Access Rules

This object is available only if the Fundraising Access license is enabled and the Fundraising User system permission is assigned to users.

Fields

Field	Details
DeveloperName	Type string Properties Create, Filter, Group, Sort, Update Description The unique name for FundraisingConfig.
DonorExternalIdField	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The field that's used as the external ID for donor lookup during gift entry. Donor name is the default lookup. This field is available from API version 62.0 and later.
DonorMatchingMethod	Type picklist

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the donor matching method that's used as the default method for the Business Process API. Possible values are: • <code>Duplicate_Management_Rules</code>—Duplicate Management Rules • <code>No_Matching</code>—No Matching The default value is <code>Duplicate_Management_Rules</code>.
FailedTransactionCount	Type int Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update Description The count of consecutively failed transactions before the gift commitment status is changed to Failing. If set to 0, the status is never auto-changed to Failing.
HouseholdSoftCreditRole	Type string Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update Description The soft credit role that's assigned to members of the donor's household.
InstallmentExtDayCount	Type int Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update Description The number of days before or after the scheduled gift transaction due date for the gift to appear in Gift Entry as a match to fulfill an open gift transaction.
IsHshldSoftCrAutoCrea	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether soft credits are automatically created for household members (<code>true</code>) or not (<code>false</code>) when the donor donates.

Field	Details
Language	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The language of the FundraisingConfig Possible values are: • da—Danish • de—German • en_US—English • es—Spanish • es_MX—Spanish (Mexico) • fi—Finnish • fr—French • it—Italian • ja—Japanese • ko—Korean • nl_NL—Dutch • no—Norwegian • pt_BR—Portuguese (Brazil) • ru—Russian • sv—Swedish • th—Thai • zh_CN—Chinese (Simplified) • zh_TW—Chinese (Traditional)
LapsedUnpaidTrxnCount	Type int Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update Description The count of consecutive unpaid transactions before the gift commitment status is changed to Lapsed. If set to 0, the status is never auto-changed to Lapsed.
MasterLabel	Type string Properties Create, Filter, Group, Sort, Update

Field	Details
	Description Label for the FundraisingConfig. In the UI, this field is Application Record Type Configuration.
NamespacePrefix	Type string Properties Filter, Group, Nillable, Sort Description The namespace prefix associated with this object. Each Developer Edition organization that creates a managed package has a unique namespace prefix. Limit: 15 characters. You can refer to a component in a managed package by using the <i>namespacePrefix__componentName</i> notation. The namespace prefix can have one of the following values: • In Developer Edition organizations, the namespace prefix is set to the namespace prefix of the organization for all objects that support it. There is an exception if an object is in an installed managed package. In that case, the object has the namespace prefix of the installed managed package. This field's value is the namespace prefix of the Developer Edition organization of the package developer. • In organizations that are not Developer Edition organizations, NamespacePrefix is only set for objects that are part of an installed managed package. There is no namespace prefix for all other objects.
OutreachSourceCodeGenFmla	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The outreach source code generation formula that's composed of the selected formula components. Available in API version 63.0 and later.
ShouldClosePaidRcrCmt	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether to automatically close a recurring gift commitment when it has no ongoing or future schedule, and no unpaid transaction (true) or not (false).
ShouldCreateRcrSchdTrxn	Type boolean

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the next transaction in a recurring schedule is automatically created (<code>true</code>) or not (<code>false</code>).
UtmCampaignSrcObj	Type string Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update Description The UTM code of the campaign for which the donation was received. This field is available from API version 60.0 and later.
UtmCampaignSrcObjField	Type string Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update Description The UTM code of the campaign for which the donation was received. This field is available from API version 60.0 and later.
UtmMediumSrcObj	Type string Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update Description The UTM code of the outreach message channel from which the donation originated. This field is available from API version 60.0 and later.
UtmMediumSrcObjField	Type string Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update Description The UTM code of the outreach message channel from which the donation originated. This field is available from API version 60.0 and later.
UtmSourceSrcObj	Type string Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The UTM code of the source from which the donation originated. This field is available from API version 60.0 and later.
UtmSourceSrcObjField	Type string Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update Description The UTM code of the source from which the donation originated. This field is available from API version 60.0 and later.

FieldMappingConfig

Represents the configuration for fields mapped between a source object and one or more destination objects and fields. This object is available in API version 63.0 and later.

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

Supported Calls

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

Special Access Rules

This object is available only if the Fundraising Access license is enabled and the Fundraising User system permission is assigned to users.

Fields

Field	Details
Description	Type textarea Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update Description The description of the field mapping configuration.
DeveloperName	Type string Properties Create, Filter, Group, Sort, Update

Field	Details
	Description The unique name for FieldMappingConfig.
Language	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The language of the FieldMappingConfig. Possible values are: • da—Danish • de—German • en_US—English • es—Spanish • es_MX—Spanish (Mexico) • fi—Finnish • fr—French • it—Italian • ja—Japanese • ko—Korean • nl_NL—Dutch • no—Norwegian • pt_BR—Portuguese (Brazil) • ru—Russian • sv—Swedish • th—Thai • zh_CN—Chinese (Simplified) • zh_TW—Chinese (Traditional)
MasterLabel	Type string Properties Create, Filter, Group, Sort, Update Description Label for the FieldMappingConfig.
NamespacePrefix	Type string Properties Filter, Group, Nillable, Sort

Field	Details
	Description The namespace prefix associated with this object. Each Developer Edition organization that creates a managed package has a unique namespace prefix. Limit: 15 characters. You can refer to a component in a managed package by using the <code>namespacePrefix__componentName</code> notation. The namespace prefix can have one of the following values: • In Developer Edition organizations, the namespace prefix is set to the namespace prefix of the organization for all objects that support it. There is an exception if an object is in an installed managed package. In that case, the object has the namespace prefix of the installed managed package. This field's value is the namespace prefix of the Developer Edition organization of the package developer. • In organizations that are not Developer Edition organizations, <code>NamespacePrefix</code> is only set for objects that are part of an installed managed package. There is no namespace prefix for all other objects.
ProcessType	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the type of process that the field mapping configuration supports. Possible values are: • <code>ChangeRequest</code> • <code>GiftEntry</code> • <code>Incident</code> • <code>Problem</code> The default value is <code>GiftEntry</code>.
SourceObjectId	Type picklist Properties Create, Filter, Group, Restricted picklist, Sort, Update Description The ID of the source object for all of the fields mapped in the configuration. Possible values are: • <code>GiftEntry</code>

FieldMappingConfigItem

Represents the fields mapped between a defined source object and the destination object and fields. This object is available in API version 63.0 and later.



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

Supported Calls

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

Special Access Rules

This object is available only if the Fundraising Access license is enabled and the Fundraising User system permission is assigned to users.

Fields

Field	Details
DestinationFieldId	Type picklist Properties Create, Filter, Group, Restricted picklist, Sort, Update Description The ID of the destination field for the field mapping configuration.
DestinationObjectId	Type picklist Properties Create, Filter, Group, Restricted picklist, Sort, Update Description The ID of the destination object for the field mapping configuration.
FieldMappingConfigId	Type reference Properties Create, Filter, Group, Sort Description The parent field mapping configuration associated with the field mapping configuration item. This field is a relationship field. Relationship Name FieldMappingConfig

Field	Details
	Relationship Type Master-detail Refers To FieldMappingConfig (the master object)
Sequence	Type int Properties Create, Filter, Group, Sort, Update Description The order number of the field relative to other fields, determining the sequence in which fields are displayed within a custom user interface.
SourceFieldId	Type picklist Properties Create, Filter, Group, Restricted picklist, Sort, Update Description The ID of the source field for the field mapping configuration.

GiftEntryGridTemplate

Represents templates that customize the gift entry grid in Fundraising. Available in API version 66.0 and later.

Special Access Rules

This object is available only if the Fundraising Access license is enabled, the Fundraising User system permission is assigned to users, and the Gift Entry Grid is enabled.

Fields

Field	Details
Description	Type textarea Properties Create, Nillable, Update Description The description of the gift entry grid template.
IsActive	Type boolean

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether this template is active and available for use in the Gift Entry Grid. Active templates appear as values in the Screen Template Name picklist on the gift batch object.
IsSingleGiftDefault	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the template is the default template for single gift entry (true) or not (false, the default).
TemplateConfiguration	Type string Properties Create, Filter, Group, Sort, Update Description The template configuration file that includes the data for fields, columns, and components.

CHAPTER 4 Program Management

In this chapter ...

- [Program Management Standard Objects](#)
- [Program Management Business APIs](#)

This guide provides information about the objects and APIs that Program Management uses. You can also find developer resources for features that can be used to extend Program Management.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions.

Program Management Standard Objects

Program Management data model provides objects and fields to manage programs and benefits for your nonprofit organization.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions.

Benefit

Represents information about benefits associated with a program. This object is available with Program Management in API version 57.0 and later.

BenefitAssignment

Represents the enrollment information of an individual to a benefit. This object is available with Program Management in API version 57.0 and later.

BenefitDisbursement

Represents the allocation of an enrollee's benefit that can be made as monetary or non-monetary with different frequencies. This object is available with Program Management in API version 57.0 and later.

BenefitSchedule

Represents information about the plan for delivering the benefit. This object is available in API version 57.0 and later.

BenefitScheduleAssignment

Represents the junction between Benefit Schedule and Benefit Assignment objects. This object is available in API version 59.0 and later.

BenefitSession

Represents information about an instance of a planned benefit delivery. This object is available in API version 57.0 and later.

BenefitType

Represents the type of benefit being delivered. Use benefit types in conjunction with units of measure to report on how many or how much of a type of benefit your organization delivers across programs. This object is available with Program Management in API version 57.0 and later.

CaseProgram

Represents the junction between Case and Program objects. This object is available in API version 57.0 and later.

Program

Represents information about the enrollment and disbursement of benefits in a program. This object is available in API version 57.0 and later.

ProgramCohort

Represents information about the participants of a program cohort. This object is available in API version 61.0 and later.

ProgramCohortMember

Represents program enrollees that are part of a given cohort. This object is available in API version 61.0 and later.

ProgramEnrollment

Represents details of enrollment for benefits in a program. This object is available in API version 57.0 and later.

RecurrenceSchedule

Represents the recurrence schedule for a benefit schedule. This object is available with Program Management in API version 57.0 and later.

Benefit

Represents information about benefits associated with a program. This object is available with Program Management in API version 57.0 and later.



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

Supported Calls

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

Fields

Field	Details
BenefitManagerId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The person in charge of the benefit. This field is a relationship field. Relationship Name BenefitManager Relationship Type Lookup Refers To User
BenefitStatus	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update Description Specifies the status of the benefit. Possible values are: • Active • Cancelled • Completed • Planned The default value is <code>Active</code>.

Field	Details
BenefitTypeId	Type reference Properties Create, Filter, Group, Sort Description Specifies the type of the benefit. This field is a relationship field. Relationship Name BenefitType Relationship Type Master-Detail Refers To BenefitType
BnftDisbFieldSetApiName	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The API name of the field set that groups benefit specific fields for the benefit disbursement object.
CurrentMonthDisbursedQty	Type double Properties Create, Filter, Nillable, Sort, Update Description The total quantity of benefits disbursed in the current month. Data Processing Engine calculates this field if you activate the Program Management Data Processing Engine Definition templates in Setup. You can schedule this calculation to run on a regular basis.
CurrentYearAssignedQty	Type double Properties Create, Filter, Nillable, Sort, Update Description The total quantity of benefits assigned in the current year. Data Processing Engine calculates this field if you activate the Program Management Data Processing Engine Definition templates in Setup. You can schedule this calculation to run on a regular basis.
CurrentYearDisbursedQty	Type double

Field	Details
	Properties Create, Filter, Nillable, Sort, Update Description The total quantity of benefits disbursed in the current year. Data Processing Engine calculates this field if you activate the Program Management Data Processing Engine Definition templates in Setup. You can schedule this calculation to run on a regular basis.
Description	Type textarea Properties Create, Filter, Nillable, Sort, Update Description The description of the benefit.
EndDateTime	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The end date until when the benefit is valid.
EnrollmentCount	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The number of times the benefit is applicable to an individual.
GoalDefinitionId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The goal definition associated with the benefit. This field is a relationship field. Relationship Name GoalDefinition Relationship Type Lookup Refers To GoalDefinition

Field	Details
IsActive	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates if the benefit is active. The default value is false.
MaximumBenefitAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The maximum amount that can be disbursed for a period.
MinimumBenefitAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The minimum amount that can be disbursed for a period.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the benefit.
PreviousMonthDisbursedQty	Type double Properties Create, Filter, Nillable, Sort, Update Description The total quantity of benefits disbursed in the previous month. Data Processing Engine calculates this field if you activate the Program Management Data Processing Engine Definition templates in Setup. You can schedule this calculation to run on a regular basis.
PreviousYearAssignedQty	Type double

Field	Details
	Properties Create, Filter, Nillable, Sort, Update Description The total quantity of benefits assigned in the previous year. Data Processing Engine calculates this field if you activate the Program Management Data Processing Engine Definition templates in Setup. You can schedule this calculation to run on a regular basis.
PreviousYearDisbursedQty	Type double Properties Create, Filter, Nillable, Sort, Update Description The total quantity of benefits disbursed in the previous year. Data Processing Engine calculates this field if you activate the Program Management Data Processing Engine Definition templates in Setup. You can schedule this calculation to run on a regular basis.
ProgramId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The identifier of the program that's associated with the benefit. This field is a relationship field. Relationship Name Program Relationship Type Lookup Refers To Program
StartDateTime	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The date when the benefit starts.
UnitId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The identifier of the unit of measure that's used to calculate the benefit. This field is a relationship field.
	Relationship Name Unit
	Relationship Type Lookup
	Refers To UnitOfMeasure

BenefitAssignment

Represents the enrollment information of an individual to a benefit. This object is available with Program Management in API version 57.0 and later.

Supported Calls

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

Fields

Field	Details
BenefitId	Type reference
	Properties Create, Filter, Group, Sort, Update
	Description Name of the benefit that is associated with the assignment. This field is a relationship field.
	Relationship Name Benefit
	Relationship Type Lookup
	Refers To Benefit
EndTime	Type dateTime

Field	Details
	Properties Create, Filter, Nillable, Sort, Update Description The end date up to when the assignment is valid.
EnrolleeId	Type reference Properties Create, Filter, Group, Sort, Update Description Name of the benefit assignee. This field is a polymorphic relationship field. Relationship Name Enrollee Relationship Type Lookup Refers To Account, Contact
EnrollmentCount	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The number of times the benefit is applicable to an individual.
EntitlementAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The benefit amount that an enrollee is eligible for.
MaximumBenefitAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The maximum amount that can be disbursed for a period.

Field	Details
MinimumBenefitAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The minimum amount that can be disbursed for a period.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description Name of the benefit assignment.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description ID of the owner of this record. This field is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
ParentRecordId	Type reference Properties Create, Filter, Group, Sort, Update Description Required. The parent record associated with the benefit assignment. This field is a polymorphic relationship field. Use <i>CarePlan</i> if the benefit is part of a structured care plan, <i>GoalAssignment</i> if it supports a specific goal, <i>IndividualApplication</i> if assigned during intake, and <i>ProgramEnrollment</i> if the participant is only using program management features. Relationship Name ParentRecord

Field	Details
	Relationship Type Lookup Refers To CarePlan, GoalAssignment, IndividualApplication, ProgramEnrollment
Priority	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the priority of the benefit assignment. Possible values are: • High • Low • Medium
ProgramEnrollmentId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The identifier of the program enrollment record that's associated with the benefit assignment. This field is a relationship field. Relationship Name ProgramEnrollment Relationship Type Lookup Refers To ProgramEnrollment
StartDateTime	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The start date from when the assignment begins.
Status	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Specifies the status of the benefit assignment. Possible values are: • Active • Completed • Enrolled • Waitlisted • Withdrawn The default value is Enrolled.
TaskJobStatus	Type picklist Properties Filter, Group, Nillable, Restricted picklist, Sort Description Specifies the status of the task in the task queue. Possible values are: • Completed • Failed • InProgress - In Progress • Submitted
TaskJobStatusMessage	Type textarea Properties Nillable Description The message that describes the status of the task in the queue.
UnitofMeasureId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The identifier of the unit of measure that's used to calculate the benefit type. This field is a relationship field. Relationship Name UnitofMeasure Relationship Type Lookup

Field	Details
	Refers To UnitOfMeasure

BenefitDisbursement

Represents the allocation of an enrollee's benefit that can be made as monetary or non-monetary with different frequencies. This object is available with Program Management in API version 57.0 and later.

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

Supported Calls

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

Fields

Field	Details
ActualCompletionDate	Type dateTime Properties Create, Filter, Sort, Update Description The date when the benefit disbursement was completed.
ApprovalStatus	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the disbursement status of the benefit. Possible values are: • Approved • In Review • Not Applicable • Pending • Rejected
BenefitAssignmentId	Type reference

Field	Details
	Properties Create, Filter, Group, Sort Description The benefit assignment that's associated with the disbursement. This field is a relationship field. Relationship Name BenefitAssignment Relationship Type Master-Detail Refers To BenefitAssignment
BenefitSessionId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The benefit session that's associated with the benefit disbursement. This field is accessible if you enabled Data Protection and Privacy in Setup. This field is a relationship field. Relationship Name BenefitSession Relationship Type Lookup Refers To BenefitSession
Description	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description A description about the benefit that is disbursed. This field is accessible if you enabled Data Protection and Privacy in Setup.
DisbursedQuantity	Type double Properties Create, Filter, Nillable, Sort, Update

Field	Details
	Description The quantity of the benefit that's disbursed. This field is accessible if you enabled Data Protection and Privacy in Setup.
DisbursementStatus	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update Description Specifies the status of the benefit disbursement. Possible values are: • Absent • Completed • Enrolled • Excused The default value is <code>Enrolled</code> . This field is accessible if you enabled Data Protection and Privacy in Setup.
EndDate	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The end date of the benefit period in every payment cycle.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description Name of the benefit disbursement.
ProgramEnrollmentId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The program enrollment record that's associated with the benefit disbursement. This field is accessible if you enabled Data Protection and Privacy in Setup. This field is a relationship field.

Field	Details
	Relationship Name ProgramEnrollment Relationship Type Lookup Refers To ProgramEnrollment
RecipientCount	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The count of recipients who received the benefit. This field is accessible if you enabled Data Protection and Privacy in Setup.
RecipientId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The participant who receives a benefit. This field is a polymorphic relationship field. Relationship Name Recipient Relationship Type Lookup Refers To Account, Contact
RecipientType	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update Description Specifies the recipient type of the benefit that's disbursed. Possible values are: • Anonymous • Program Enrollment • Walk-in The default value is ProgramEnrollment.

Field	Details
	This field is accessible if you enabled Data Protection and Privacy in Setup.
StartDate	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The start date of the benefit period in every payment cycle.
UnitOfMeasureId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The identifier of the unit of measure that's used to calculate the benefit type. This field is accessible if you enabled Data Protection and Privacy in Setup. This field is a relationship field. Relationship Name UnitOfMeasure Relationship Type Lookup Refers To UnitOfMeasure

BenefitSchedule

Represents information about the plan for delivering the benefit. This object is available in API version 57.0 and later.



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

Supported Calls

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

Fields

Field	Details
BenefitId	Type reference

Field	Details
	Properties Create, Filter, Group, Sort Description The identifier of the benefit that's associated with the schedule. This field is a relationship field. Relationship Name Benefit Relationship Type Master-Detail Refers To Benefit
DefaultBenefitQuantity	Type double Properties Create, Filter, Sort, Update Description The default quantity of benefit that's provided within a session of benefit schedule.
Description	Type textarea Properties Create, Filter, Nillable, Sort, Update Description The description of the benefit schedule.
FirstSessionEndDateTime	Type dateTime Properties Create, Filter, Sort, Update Description The date and time when the first session ends in the benefit schedule.
FirstSessionStartDateTime	Type dateTime Properties Create, Filter, Sort, Update Description The date and time when the first session begins in the benefit schedule.

Field	Details
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The date when the record was last viewed.
MaximumParticipantCount	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The maximum number of participants in a session.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the benefit schedule.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description This field is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User

Associated Objects

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

BenefitScheduleFeed

Feed tracking is available for the object.

BenefitScheduleHistory

History is available for tracked fields of the object.

BenefitScheduleAssignment

Represents the junction between Benefit Schedule and Benefit Assignment objects. This object is available in API version 59.0 and later.



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

Supported Calls

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

Special Access Rules

Fields

Field	Details
BenefitAssignmentId	Type reference Properties Create, Filter, Group, Sort, Update Description The benefit assignment associated with the benefit schedule. This field is a relationship field. Relationship Name BenefitAssignment Relationship Type Lookup Refers To BenefitAssignment
BenefitScheduleId	Type reference

Field	Details
	Properties Create, Filter, Group, Sort Description The benefit schedule to which benefit participants are being assigned. This field is a relationship field. Relationship Name BenefitSchedule Relationship Type Master-Detail Refers To BenefitSchedule
EndDateTime	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The end date and time of the participant's assignment to the benefit schedule.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed this record.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the benefit schedule assignment.

Field	Details
StartDateTime	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The start date and time of the participant's assignment to the benefit schedule.

BenefitSession

Represents information about an instance of a planned benefit delivery This object is available in API version 57.0 and later.

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

Supported Calls

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

Fields

Field	Details
AbsenteesCount	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The total number of participants who didn't attend the benefit session. This field is available from API version 65.0 and later.
AttendanceRate	Type percent Properties Create, Filter, Nillable, Sort, Update Description The percentage of participants who attended the benefit session. The value of this field is calculated by a formula: (Attendees Count) / (Attendees Count + Absentees Count) This field is available from API version 65.0 and later.

Field	Details
AttendeesCount	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The total number of participants who attended a benefit session. This field is available from API version 65.0 and later.
BenefitScheduleId	Type reference Properties Create, Filter, Group, Sort Description The identifier of the benefit schedule that's associated with the benefit session. This field is a relationship field. Relationship Name BenefitSchedule Relationship Type Master-Detail Refers To BenefitSchedule
EndTime	Type dateTime Properties Create, Filter, Sort, Update Description The end date and time of the benefit session.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort

Field	Details
	Description The date when the record was last viewed.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the benefit session.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The ID of the benefit session record owner. This field is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
StartDateTime	Type dateTime Properties Create, Filter, Sort, Update Description The start date and time of the benefit session.
Status	Type picklist Properties Create, Filter, Group, Restricted picklist, Sort, Update Description The status of the benefit session. Possible values are: - Cancelled - Completed - Postponed

Field	Details
	Scheduled

Associated Objects

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

BenefitSessionFeed

Feed tracking is available for the object.

BenefitSessionHistory

History is available for tracked fields of the object.

BenefitType

Represents the type of benefit being delivered. Use benefit types in conjunction with units of measure to report on how many or how much of a type of benefit your organization delivers across programs. This object is available with Program Management in API version 57.0 and later.

Field	Details
Category	Type picklist Properties Create, Filter, Group, Sort, Update Description Required. The category of the benefit type. Picklist values aren't provided for this field and must be added based on the requirements of the organization.
Description	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The description of benefit type.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the benefit type.

Field	Details
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description ID of the owner of this record. This field is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
ProcessType	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Required. The process type associated with the program management benefit type. Possible value: <code>Program Management</code>
Type	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the type of benefit being offered as part of the program. Possible values are: • Goods • Monetary • Service The default value is <code>Service</code>.
UnitofMeasureId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The identifier of the unit of measure that's used to calculate the benefit type.

Field	Details
	This field is a relationship field.
	Relationship Name UnitofMeasure
	Relationship Type Lookup
	Refers To UnitOfMeasure

CaseProgram

Represents the junction between Case and Program objects. This object is available in API version 57.0 and later.



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

Supported Calls

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

Fields

Field	Details
CaseId	Type reference Properties Create, Filter, Group, Sort Description The identifier of the case that's associated with the program. This field is a relationship field. Relationship Name Case Relationship Type Master-Detail Refers To Case
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort

Field	Details
	Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The date when the record was last viewed.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the case program.
ProgramId	Type reference Properties Create, Filter, Group, Sort, Update Description The identifier of the program that's associated with the case. This field is a relationship field. Relationship Name Program Relationship Type Lookup Refers To Program

Program

Represents information about the enrollment and disbursement of benefits in a program. This object is available in API version 57.0 and later.

Supported Calls

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

Fields

Field	Details
ActionPlanTemplateId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The action plan template that's associated with the program. This field is a relationship field. This field is available from API version 65.0 and later. Relationship Name ActionPlanTemplate Refers To ActionPlanTemplate
ActiveEnrolleeCount	Type double Properties Create, Filter, Nillable, Sort, Update Description The count of program enrollees with <code>IsActive</code> on ProgramEnrollment selected. Data Processing Engine calculates this field if you activate the Program Management Data Processing Engine Definition templates in Setup. You can schedule this calculation to run on a regular basis.
AdditionalContext	Type textarea Properties Create, Nillable, Update Description The additional context about the program.
CurrentMonthDisbCount	Type double Properties Create, Filter, Nillable, Sort, Update Description The count of benefits disbursed in the current month. Data Processing Engine calculates this field if you activate the Program Management Data Processing Engine Definition templates in Setup. You can schedule this calculation to run on a regular basis.

Field	Details
CurrentYearDisbCount	Type double Properties Create, Filter, Nillable, Sort, Update Description The count of benefits disbursed in the current year. Data Processing Engine calculates this field if you activate the Program Management Data Processing Engine Definition templates in Setup. You can schedule this calculation to run on a regular basis.
EndDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date when the program ends.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the program.
OwnerId	Type reference

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The user who owns the object. This field is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
ParentProgramId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The associated parent program. This field is available from API version 59.0 and later. This field is a relationship field. Relationship Name ParentProgram Relationship Type Lookup Refers To Program
PreviousMonthDisbCount	Type double Properties Create, Filter, Nillable, Sort, Update Description The count of benefits disbursed in the previous month. Data Processing Engine calculates this field if you activate the Program Management Data Processing Engine Definition templates in Setup. You can schedule this calculation to run on a regular basis.
PreviousYearDisbCount	Type double Properties Create, Filter, Nillable, Sort, Update

Field	Details
	Description The count of benefits disbursed in the previous year. Data Processing Engine calculates this field if you activate the Program Management Data Processing Engine Definition templates in Setup. You can schedule this calculation to run on a regular basis.
StartDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date when the program begins.
Status	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The status of the program. Possible values are: • Active • Cancelled • Completed • Planned This field is accessible if you enabled Data Protection and Privacy in Setup.
Summary	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The summary of the program.
TotalEnrolleeCount	Type double Properties Create, Filter, Nillable, Sort, Update Description The total count of enrollees in the program. Data Processing Engine calculates this field if you activate the Program Management Data Processing Engine Definition templates in Setup. You can schedule this calculation to run on a regular basis.

Field	Details
UsageType	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the usage type of the program. Possible value is <code>ProgramManagement</code>.

Associated Objects

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

ProgramChangeEvent

Change events are available for the object.

ProgramFeed

Feed tracking is available for the object.

ProgramHistory

History is available for tracked fields of the object.

ProgramOwnerSharingRule

Sharing rules are available for the object.

ProgramShare

Sharing is available for the object.

ProgramCohort

Represents information about the participants of a program cohort. This object is available in API version 61.0 and later.



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

Supported Calls

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

Special Access Rules

This object is available only if the Advanced Program Management license is enabled, Program Cohorts are enabled, and the Advanced Program Management system permission is assigned to users.

Fields

Field	Details
CurrentMemberCount	Type int Properties Filter, Group, Nillable, Sort Description The number of members that are actively participating in the cohort. This is a roll-up summary field.
Description	Type textarea Properties Create, Nillable, Update Description The description of the program cohort.
EndDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The end date of the program cohort.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate is not null, the user accessed this record or list view indirectly.
MaximumMemberCount	Type int

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update Description The maximum number of members that can be active in a cohort. Add custom validation to enforce this maximum count.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the program cohort.
ProgramId	Type reference Properties Create, Filter, Group, Sort Description The program associated with the cohort. This field is a relationship field. Relationship Name Program Relationship Type Master-detail Refers To Program (the master object)
StartDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The start date of the program cohort.
Status	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the status of the program cohort. Possible values are:

Field	Details
	• Active • Canceled • Completed • Planned

Associated Objects

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

ProgramCohortFeed

Feed tracking is available for the object.

ProgramCohortHistory

History is available for tracked fields of the object.

ProgramCohortMember

Represents program enrollees that are part of a given cohort. This object is available in API version 61.0 and later.

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

Supported Calls

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

Special Access Rules

This object is available only if the Advanced Program Management license is enabled, Program Cohorts are enabled, and the Advanced Program Management system permission is assigned to users.

Fields

Field	Details
IsRemovedFromCohort	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates if the program cohort member was removed from the cohort. The default value is <code>false</code>.

Field	Details
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate is not null, the user accessed this record or list view indirectly.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description The name of the program cohort member.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description ID of the user who owns the record. This field is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
ProgramCohortId	Type reference Properties Create, Filter, Group, Sort

Field	Details
	Description The program cohort associated with the program cohort member. This field is a relationship field. Relationship Name ProgramCohort Relationship Type Master-detail Refers To ProgramCohort (the master object)
ProgramEnrolleeId	Type reference Properties Filter, Group, Nillable, Sort Description The account or contact enrolled in the program. This field is a polymorphic relationship field. This field is a calculated field. Relationship Name ProgramEnrollee Relationship Type Lookup Refers To Account, Contact
ProgramEnrollmentId	Type reference Properties Create, Filter, Group, Sort, Update Description The program enrollment associated with the program cohort member. This field is a relationship field. Relationship Name ProgramEnrollment Relationship Type Lookup Refers To ProgramEnrollment

Field	Details
ProgramEnrollmentStatus	Type picklist Properties Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort Description Specifies the status of the program enrollment associated with this cohort member. This field is a calculated field. Possible values are: • Applied • Completed • Denied • In Progress • Waitlisted • Withdrawn The default value is <code>Applied</code>.
RemovalDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date when the program cohort member was removed from the cohort.

Associated Objects

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

[ProgramCohortMemberFeed](#)

Feed tracking is available for the object.

[ProgramCohortMemberHistory](#)

History is available for tracked fields of the object.

[ProgramCohortMemberOwnerSharingRule](#)

Sharing rules are available for the object.

[ProgramCohortMemberShare](#)

Sharing is available for the object.

ProgramEnrollment

Represents details of enrollment for benefits in a program. This object is available in API version 57.0 and later.

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

Supported Calls

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

Fields

Field	Details
AccountId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The ID of the account that's associated with an individual or an organization enrolled in the program. This field is a relationship field. Relationship Name Account Relationship Type Lookup Refers To Account
ApplicationDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date when the enrollee applied to the program.
ContactId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The ID of the contact that's associated with an individual enrolled in the program. This field is a relationship field. Relationship Name Contact

Field	Details
	Relationship Type Lookup Refers To Contact
CurrentMonthDisbCount	Type double Properties Create, Filter, Nillable, Sort, Update Description The count of benefits disbursed to the enrollee in the current month. Data Processing Engine calculates this field if you activate the Program Management Data Processing Engine Definition templates in Setup. You can schedule this calculation to run on a regular basis.
CurrentYearDisbCount	Type double Properties Create, Filter, Nillable, Sort, Update Description The count of benefits disbursed to the enrollee in the current year. Data Processing Engine calculates this field if you activate the Program Management Data Processing Engine Definition templates in Setup. You can schedule this calculation to run on a regular basis.
EligibilityLastVerifiedDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date when the enrollee's program eligibility status was last verified.
EndDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The end date of the enrollment in the program.
IsActive	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	Description Indicates whether the enrollment for the participant in the program is active (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.
IsAnonymous	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the participant enrolled to the program anonymously (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the program enrollment record.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	Description The user who owns the object. This field is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
PreviousMonthDisbCount	Type double Properties Create, Filter, Nillable, Sort, Update Description The count of benefit disbursed to the enrollee in the previous month. Data Processing Engine calculates this field if you activate the Program Management Data Processing Engine Definition templates in Setup. You can schedule this calculation to run on a regular basis.
PreviousYearDisbCount	Type double Properties Create, Filter, Nillable, Sort, Update Description The count of benefits disbursed to the enrollee in the previous year. Data Processing Engine calculates this field if you activate the Program Management Data Processing Engine Definition templates in Setup. You can schedule this calculation to run on a regular basis.
ProgramId	Type reference Properties Create, Filter, Group, Sort Description The identifier of the program that's associated with the enrollee. This field is a relationship field. Relationship Name Program Relationship Type Master-Detail Refers To Program

Field	Details
SessionsAbsentCount	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The total number of benefit sessions for the program that were scheduled for the participant but not attended. This field is available from API version 65.0 and later.
SessionsAttendanceRate	Type percent Properties Create, Filter, Nillable, Sort, Update Description The percentage of scheduled benefit sessions for the program that the participant attended. The value of this field is calculated by a formula: (Attended Sessions Count) / (Attended Sessions Count + Absent Sessions Count) This field is available from API version 65.0 and later.
SessionsAttendedCount	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The total number of benefit sessions for the program that were scheduled for and attended by the participant. This field is available from API version 65.0 and later.
StartDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The start date of the enrollment in the program.
Status	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update Description The enrollment status of the enrollee for the program.

Field	Details
	Possible values are: • Applied • Completed • Denied • In Progress • Waitlisted • Withdrawn The default value is <code>Applied</code>.

Associated Objects

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

ProgramEnrollmentFeed

Feed tracking is available for the object.

ProgramEnrollmentHistory

History is available for tracked fields of the object.

ProgramEnrollmentOwnerSharingRule

Sharing rules are available for the object.

ProgramEnrollmentShare

Sharing is available for the object.

RecurrenceSchedule

Represents the recurrence schedule for a benefit schedule. This object is available with Program Management in API version 57.0 and later.

Supported Calls

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

Fields

Field	Details
<code>CompletedScheduleCount</code>	Type int Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The number of times the schedule was completed.
EndDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date when the schedule ends.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the recurrence schedule.
NextScheduleDateTime	Type dateTime Properties Create, Filter, Sort, Update Description The date and time when the schedule is executed next.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The user who owns the object. This field is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
ProcessName	Type picklist

Field	Details
	Properties Create, Filter, Group, Restricted picklist, Sort, Update Description The name of the scheduling process that executes the request. Possible values are: - Industries_ActionPlan - Industries_ProgramManagement
ReferenceRecordId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The related record for which you're creating the recurrence schedule. For example, creating a recurrence schedule for a related Benefit Schedule entity. This field is a polymorphic relationship field. Relationship Name ReferenceRecord Relationship Type Lookup Refers To ActionPlan, BenefitSchedule
ScheduleDayValue	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The days in a week when the schedule is executed. This field contains a bit mask. - Monday = 64 - Tuesday = 32 - Wednesday = 16 - Thursday = 8 - Friday = 4 - Saturday = 2 - Sunday = 1 Multiple days are represented as the sum of their numerical values. For example, Tuesday and Thursday = 32 + 8 = 40.

Field	Details
ScheduleFrequency	Type picklist Properties Create, Filter, Group, Restricted picklist, Sort, Update Description Specifies the frequency at which the schedule is executed. Possible values are: • Biweekly • Halyearly—Half Yearly • Monthly • Quarterly • Weekly • Yearly
StartDate	Type dateTime Properties Create, Filter, Sort, Update Description The date when the schedule begins.
Status	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The status of the schedule. Possible values are: • Active • Inactive
TotalRecurrencesCount	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The number of times the schedule is executed.

Program Management Business APIs

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

Program Management has these resources.

Resource	Description
/connect/program-mgmt/programs/{programId}/enrollments	Enroll participants in a program. An enrollee can either be a contact or an account.
/connect/program-mgmt/programs/{programId}/enrollments	Update program enrollments.
/connect/program-mgmt/benefit-schedules	Create a preview of the benefit scheduling session.
/connect/program-mgmt/benefit-schedules/{benefitScheduleId}/sessions	Create a benefit schedule for a benefit session.
/connect/program-mgmt/benefit-schedules/{benefitScheduleId}/participants	Add participants to a benefit schedule.
/connect/program-mgmt/benefit-schedules/{benefitScheduleId}/benefit-sessions/{benefitSessionId}/participants	Add participants to a benefit session.
/connect/program-mgmt/benefit/{benefitId}/benefit-disbursements	Create benefit disbursements for ad hoc walk-in participants.
/connect/program-mgmt/case-programs/{caseId}	Create case programs.

REST Reference

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

REST Reference

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

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

EDITIONS

Available in: Lightning Experience

Available in: Program Management is available with Enterprise, Unlimited, and Performance Editions with the Impact Cloud.

Resources

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

Requests

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

Responses

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

Resources

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

Benefit Disbursements (POST)

Create benefit disbursements for ad hoc walk-in participants.

Benefit Session Participants (POST)

Add participants to a benefit session.

Benefit Schedule Participants (POST)

Asynchronously add participants to a benefit schedule.

Benefit Schedule Participants (DELETE)

Remove participants from a benefit schedule asynchronously.

Benefit Schedule Sessions (POST)

Create a benefit schedule for a benefit session.

Benefit Schedule Sessions Preview (POST)

Create a preview of the benefit scheduling session. Users can preview the benefit sessions before they are created.

Benefit Disbursement Field Set API Names

Retrieve the API names of the field sets associated with a benefit disbursement object.

Case Programs (POST)

Create case programs.

Program Enrollments (POST)

Enroll participants in a program.

Program Enrollments (PUT)

Update program enrollments.

Benefit Disbursements (POST)

Create benefit disbursements for ad hoc walk-in participants.

Resource

```
/connect/program-mgmt/benefit/${benefitId}/benefit-disbursements
```

Example URI

```
https://yourInstance.salesforce.com/services/data/v66.0/connect  
/program-mgmt/benefit/${benefitId}/benefit-disbursements
```

Available version

57.0

HTTP methods

POST

Request body for POST**Root XML tag**

<BenefitDisbursementsInputRepresentation>

JSON example

```
{
  "enrollees": {
    "enrolleeList": [
      "003T1000001U6axIAC"
    ]
  },
  "quantity": 2.5,
  "status": "Enrolled",
  "disbursementDate": "2022-12-18T14:30:00.000"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
disbursementDate	String	The date on which the benefit is disbursed.	Required	57.0
enrollees	String[]	The list of enrollees who will receive the benefit disbursement. The enrollee can either be a contact or an account.	Required	57.0
quantity	Double	The quantity of the benefit to be disbursed.	Required	57.0
status	String	The status of the benefit disbursement.	Required	57.0

Response body for POST[Benefit Disbursements Output](#)**Benefit Session Participants (POST)**

Add participants to a benefit session.

Resource

```
/connect/program-mgmt/benefit-schedules/${benefitScheduleId}/benefit-sessions/${benefitSessionId}/participants
```

Example URI

```
https://yourInstance.salesforce.com/services/data/v66.0/connect  
/program-mgmt/benefit-schedules/${benefitScheduleId}/benefit-sessions/${benefitSessionId}/participants
```

Available version

57.0

HTTP methods

POST

Request body for POST**Root XML tag**

<BenefitSessionParticipantsInputRepresentation>

JSON example

```
{  
  "enrollees": {  
    "enrolleeList": [  
      "003xx000004WhKeAAK"  
    ]  
  }  
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
enrollees	String[]	The list of enrollees to be added to a benefit session. The enrollee can either be a contact, an account, or a program enrollment.	Required	57.0

Response body for POST[Benefit Session Participants Output](#)**Benefit Schedule Participants (POST)**

Asynchronously add participants to a benefit schedule.

Resource

```
/connect/program-mgmt/benefit-schedules/${benefitScheduleId}/participants
```

Example URI

```
https://yourInstance.salesforce.com/services/data/v66.0/connect  
/program-mgmt/benefit-schedules/${benefitScheduleId}/participants
```

Available version

57.0

HTTP methods

POST

Request body for POST**Root XML tag**

<BenefitScheduleParticipantsInputRepresentation>

JSON example

```
{
  "enrollees": {
    "enrolleeList": [
      "003xx000004WhKeAAK"
    ]
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
enrollees	String[]	The list of enrollees to be added to a benefit schedule. The enrollee can either be a contact, an account, or a program enrollment.	Required	57.0

Response body for POST[Benefit Schedule Participants Output](#)**Benefit Schedule Participants (DELETE)**

Remove participants from a benefit schedule asynchronously.

Remove participants from a benefit schedule asynchronously. Include benefit schedule assignment records in the API's operation. Benefit schedule assignments enable accurate updating of end dates when removing participants from sessions.

Removing a participant from a benefit schedule:

- Updates the end date of all the active benefit schedule assignments associated with the participant to a current date. If a future session's `startingBenefitSessionId` is provided, Salesforce updates the end date for the benefit schedule assignments to the end date of that session. If the session is in the past or no `startingBenefitSessionId` is provided, Salesforce updates the end date to the current date.
- Deletes benefit disbursements for future sessions whose attendance wasn't changed from the default `Enrolled` status to `Completed`, `Excused`, or `Absent`. If a `startingBenefitSessionId` is provided, Salesforce removes participants from that session onwards, including past and future sessions. If a `startingBenefitSessionId` isn't provided, Salesforce removes participants from current and future sessions.

Resource

```
/connect/program-mgmt/benefit-schedules/{benefitScheduleId}/benefit-assignments
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v66.0/connect/program-mgmt/benefit-schedules/BS-00000006/benefit-assignments?ids=BA-00000001,BA-00000002
```

```
https://yourInstance.salesforce.com/services/data/v66.0/connect/program-mgmt/benefit-schedules/${benefitScheduleId}/benefit-assignments?ids=BA-00000001,BA-00000002&startingBenefitSessionId=BS-00000001
```

Available version

59.0

HTTP methods

DELETE

Query parameters for DELETE

Parameter Name	Type	Description	Required or Optional	Available Version
ids	String[]	Valid IDs of benefit assignments related to the participants to be removed. You can provide a maximum of 100 IDs.	Required	59.0
startingBenefitSessionId	String[]	Valid benefit session ID associated with the benefit assignment IDs. If provided, the operation will affect that session and all subsequent sessions where attendance is yet to be marked. If not provided, the operation will default to affecting only future sessions.	Optional	61.0

Benefit Schedule Sessions (POST)

Create a benefit schedule for a benefit session.

Resource

```
/connect/program-mgmt/benefit-schedules/${benefitScheduleId}/sessions
```

Example URI

```
https://yourInstance.salesforce.com/services/data/v66.0/connect/program-mgmt/benefit-schedules/${benefitScheduleId}/sessions
```

Available version

57.0

HTTP methods

POST

Response body for POST

[Generate Benefit Session Output](#)

Benefit Schedule Sessions Preview (POST)

Create a preview of the benefit scheduling session. Users can preview the benefit sessions before they are created.

Resource

```
/connect/program-mgmt/benefit-schedules
```

Example URI

```
https://yourInstance.salesforce.com/services/data/v66.0/connect  
/program-mgmt/benefit-schedules
```

Available version

57.0

HTTP methods

POST

Request body for POST**Root XML tag**

```
<PreviewBenefitSessionInputRepresentation>
```

JSON example

```
{
  "benefitScheduleName": "Nov Weekday schedule",
  "firstSessionStartDate": "2022-11-14T14:30:00.000",
  "firstSessionEndDate": "2022-11-14T15:00:00.000",
  "scheduleFrequency": "Weekly",
  "scheduleDays": 96,
  "mode": "dryRun",
  "noOfSessions": 5,
  "totalRecurrencesCount": 10
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
~~benefitScheduleName~~	String	The name of the benefit schedule.	Required	57.0
~~firstSessionEndDate~~	String	The date and time when the first session ends in the benefit schedule.	Required	57.0
~~firstSessionStartDate~~	String	The date and time when the first session starts in the benefit schedule.	Required	57.0
mode	String	The mode of the benefit schedule. The <code>dryRun</code> mode indicates that no data is created.	Optional	57.0
noOfSessions	Integer	The maximum number of participants in a session. Default value is 5.	Optional	57.0
scheduleDays	Integer	The number of days in a week when the benefit schedule is executed.	Optional	57.0
scheduleEndDate	String	The date when the benefit schedule ends.	Optional	57.0

Name	Type	Description	Required or Optional	Available Version
<code>scheduleFrequency</code>	String	The frequency at which the benefit schedule is executed.	Optional	57.0
<code>totalOccurrences</code>	Integer	The number of times the benefit schedule is executed.	Optional	57.0

Response body for POST

[Preview Benefit Sessions Output](#)

Benefit Disbursement Field Set API Names

Retrieve the API names of the field sets associated with a benefit disbursement object.

Resource

```
/connect/fieldset/${objectName}
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v66.0/connect/fieldset/BenefitDisbursement
```

Available version

59.0

HTTP methods

GET

Response body for GET

[Field Sets Output](#)

Case Programs (POST)

Create case programs.

Resource

```
/connect/program-mgmt/case-programs/${caseId}
```

Example URI

```
https://yourInstance.salesforce.com/services/data/v66.0/connect  
/program-mgmt/case-programs/${caseId}
```

Available version

57.0

HTTP methods

POST

Request body for POST**JSON example**

```
{
  "caseProgramRequest": {
    "programIds": [
      "11Wxx0000004F0WEAU",
      "11Wxx0000004F0WEBQ"
    ]
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
caseProgramRequest	String[]	The list of case programs to be added.	Required	57.0

Response body for POST[Case Programs Output](#)**Program Enrollments (POST)**

Enroll participants in a program.

Resource

```
/connect/program-mgmt/programs/${programId}/enrollments
```

Example URI for POST

```
https://yourInstance.salesforce.com/services/data/v66.0/connect  
/program-mgmt/programs/11Wxx0000004F3kEAE/enrollments
```

Available version

57.0

HTTP methods

POST

Request body for POST**Root XML tag**

```
<ProgramEnrollmentsInputRepresentation>
```

Properties

Name	Type	Description	Required or Optional	Available Version
enrollees	Program Enrollment Input []	The list of program enrollments that need to be added or updated.	Required	57.0

Name	Type	Description	Required or Optional	Available Version
		For POST, the enrollments you want to add can either be a contact or an account. For PUT, specify the program enrollments that need to be updated.		

JSON example

```
{
  "enrollees": {
    "enrolleeList": [
      {
        "id": "003xx000004WhxNAAS"
      }
    ]
  }
}
```

Response body for POST

[Program Enrollments Output](#)

Program Enrollments (PUT)

Update program enrollments.

Resource

```
/connect/program-mgmt/programs/${programId}/enrollments
```

Example URI for PUT

```
https://yourInstance.salesforce.com/services/data/v66.0/connect
/program-mgmt/programs/11Wxx0000004F3kEAE/enrollments
```

Available version

57.0

HTTP methods

PUT

Request body for PUT**Root XML tag**

```
<ProgramEnrollmentsInputRepresentation>
```

Properties

Name	Type	Description	Required or Optional	Available Version
enrollees	Program Enrollment Input[]	The list of program enrollments that need to be added or updated. For POST, the enrollments you want to add can either be a contact or an account. For PUT, specify the program enrollments that need to be updated.	Required	57.0

JSON example

```
{
  "enrollees": {
    "enrolleeList": [
      {
        "id": "11Xxx0000004Gz5EAE",
        "status": "Enrolled",
        "endDate": "2025-05-11T13:05:23.000Z"
      },
      {
        "id": "11Xxx0000004Gz6EAE",
        "status": "Enrolled",
        "startDate": "2023-02-11T13:05:23.000Z",
        "endDate": "2024-01-12T13:05:23.000Z"
      },
      {
        "id": "11Xxx0000004Gz7EAE",
        "status": "Enrolled",
        "startDate": "2023-02-11T13:05:23.000Z",
        "applicationDate": "2023-02-11T13:05:23.000Z"
      },
      {
        "id": "11Xxx0000004Gz9EAE",
        "status": "Enrolled",
        "endDate": "2024-01-11T13:05:23.000Z",
        "applicationDate": "2023-02-12T13:05:23.000Z"
      }
    ]
  }
}
```

Response body for PUT

[Program Enrollments Output](#)

Requests

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

[Benefit Disbursements Input](#)

Input representation of the request to create benefit disbursements.

[Benefit Schedule Participants Input](#)

Input representation of the request to add participants to a benefit schedule.

[Benefit Session Participants Input](#)

Input representation of the request to add participants to a benefit session.

[Case Programs Input](#)

Input representation of the request to add case programs to a benefit session.

[Preview Benefit Session Input](#)

Input representation of the benefit scheduling session preview request.

[Program Enrollment Input](#)

Input representation of the enrollee for the program.

[Program Enrollments Input](#)

Input representation of the request to enroll or update participants in a program.

Benefit Disbursements Input

Input representation of the request to create benefit disbursements.

Root XML tag

```
<BenefitDisbursementsInputRepresentation>
```

JSON example

```
{
  "enrollees": {
    "enrolleeList": [
      "003T1000001U6axIAC"
    ]
  },
  "quantity": 2.5,
  "status": "Enrolled",
  "disbursementDate": "2022-12-18T14:30:00.000"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
disbursementDate	String	The date on which the benefit is disbursed.	Required	57.0
enrollees	String[]	The list of enrollees who will receive the benefit disbursement. The enrollee can either be a contact or an account.	Required	57.0

Name	Type	Description	Required or Optional	Available Version
quantity	Double	The quantity of the benefit to be disbursed.	Required	57.0
status	String	The status of the benefit disbursement.	Required	57.0

Benefit Schedule Participants Input

Input representation of the request to add participants to a benefit schedule.

Root XML tag

```
<BenefitScheduleParticipantsInputRepresentation>
```

JSON example

```
{
  "enrollees": {
    "enrolleeList": [
      "003xx000004WhKeAAK"
    ]
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
enrollees	String[]	The list of enrollees to be added to a benefit schedule. The enrollee can either be a contact, an account, or a program enrollment.	Required	57.0

Benefit Session Participants Input

Input representation of the request to add participants to a benefit session.

Root XML tag

```
<BenefitSessionParticipantsInputRepresentation>
```

JSON example

```
{
  "enrollees": {
    "enrolleeList": [
      "003xx000004WhKeAAK"
    ]
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
enrollees	String[]	The list of enrollees to be added to a benefit session. The enrollee can either be a contact, an account, or a program enrollment.	Required	57.0

Case Programs Input

Input representation of the request to add case programs to a benefit session.

JSON example

```
{
  "caseProgramRequest": {
    "programIds": [
      "11Wxx0000004F0WEAU",
      "11Wxx0000004F0WEBQ"
    ]
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
caseProgramRequest	String[]	The list of case programs to be added.	Required	57.0

Preview Benefit Session Input

Input representation of the benefit scheduling session preview request.

Root XML tag

```
<PreviewBenefitSessionInputRepresentation>
```

JSON example

```
{
  "benefitScheduleName": "Nov Weekday schedule",
  "firstSessionStartDate": "2022-11-14T14:30:00.000",
  "firstSessionEndDate": "2022-11-14T15:00:00.000",
  "scheduleFrequency": "Weekly",
  "scheduleDays": 96,
  "mode": "dryRun",
  "noOfSessions": 5,
  "totalRecurrencesCount": 10
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
benefitScheduleName	String	The name of the benefit schedule.	Required	57.0
firstSessionEndDate	String	The date and time when the first session ends in the benefit schedule.	Required	57.0
firstSessionStartDate	String	The date and time when the first session starts in the benefit schedule.	Required	57.0
mode	String	The mode of the benefit schedule. The <code>dryRun</code> mode indicates that no data is created.	Optional	57.0
noOfSessions	Integer	The maximum number of participants in a session. Default value is 5.	Optional	57.0
scheduleDays	Integer	The number of days in a week when the benefit schedule is executed.	Optional	57.0
scheduleEndDate	String	The date when the benefit schedule ends.	Optional	57.0
scheduleFrequency	String	The frequency at which the benefit schedule is executed.	Optional	57.0
totalReurrencesCount	Integer	The number of times the benefit schedule is executed.	Optional	57.0

Program Enrollment Input

Input representation of the enrollee for the program.

Root XML tag

```
<ProgramEnrollmentsDTO>
```

Properties

Name	Type	Description	Required or Optional	Available Version
applicationDate	String	The date when the enrollee applied to the program.	Optional	57.0
endDate	String	The end date of the enrollment in the program.	Optional	57.0
id	String	The ID of the enrollee record. The enrollee can either be a contact or an account.	Required	57.0
startDate	String	The start date of the enrollment in the program.	Optional	57.0

Name	Type	Description	Required or Optional	Available Version
status	String	The enrollment status of the enrollee for the program.	Optional	57.0

Program Enrollments Input

Input representation of the request to enroll or update participants in a program.

Root XML tag

```
<ProgramEnrollmentsInputRepresentation>
```

Properties

Name	Type	Description	Required or Optional	Available Version
enrollees	Program Enrollment Input[]	The list of program enrollments that need to be added or updated. For POST, the enrollments you want to add can either be a contact or an account. For PUT, specify the program enrollments that need to be updated.	Required	57.0

Responses

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

[Benefit Disbursements Output](#)

Output representation of the request to create benefit disbursements.

[Benefit Schedule Participants Output](#)

Output representation of the request to add participants to a benefit schedule.

[Benefit Session Participants Output](#)

Output representation of the request to add participants to a benefit session.

[Benefit Sessions](#)

Output representation of the benefit sessions that are generated for preview.

[Case Programs Output](#)

Output representation of the request to add case programs to a benefit session.

[Field Sets Output](#)

Output representation of field sets of a benefit disbursement object.

[Field Set Output](#)

Output representation of the details of a field set.

[Generate Benefit Session Output](#)

Output representation of the request to create a benefit schedule session.

[Preview Benefit Sessions Output](#)

Output representation of the benefit scheduling session preview request.

[Program Enrollments Output](#)

Output representation of the request to enroll or update participants in a program.

[Standard Object Details](#)

Output representation of the details of gift transactions.

[Standard Field Details](#)

Output representation of the field attributes in a gift transaction object.

Benefit Disbursements Output

Output representation of the request to create benefit disbursements.

Property Name	Type	Description	Filter Group and Version	Available Version
message	String	The message that provides the request response details.	Small, 57.0	57.0
success	Boolean	Indicates whether the request was successful (<code>true</code>) or not (<code>false</code>).	Small, 57.0	57.0

Benefit Schedule Participants Output

Output representation of the request to add participants to a benefit schedule.

Property Name	Type	Description	Filter Group and Version	Available Version
message	String	The message that provides the request response details.	Small, 57.0	57.0
success	Boolean	Indicates whether the request was successful (<code>true</code>) or not (<code>false</code>).	Small, 57.0	57.0

Benefit Session Participants Output

Output representation of the request to add participants to a benefit session.

Property Name	Type	Description	Filter Group and Version	Available Version
message	String	The message that provides the request response details.	Small, 57.0	57.0
success	Boolean	Indicates whether the request was successful (<code>true</code>) or not (<code>false</code>).	Small, 57.0	57.0

Benefit Sessions

Output representation of the benefit sessions that are generated for preview.

Property Name	Type	Description	Filter Group and Version	Available Version
endDate	String	The end date and time of the benefit session.	Small, 57.0	57.0
name	String	The name of the benefit session.	Small, 57.0	57.0
startDate	String	The start date and time of the benefit session.	Small, 57.0	57.0

Case Programs Output

Output representation of the request to add case programs to a benefit session.

Property Name	Type	Description	Filter Group and Version	Available Version
message	String	The message that provides the request response details.	Small, 57.0	57.0
success	Boolean	Indicates whether the request was successful (<code>true</code>) or not (<code>false</code>).	Small, 57.0	57.0

Field Sets Output

Output representation of field sets of a benefit disbursement object.

JSON example

```
{
  "fieldSets": [
    {
      "description": "FS1",
      "fieldSetApiName": "FS1_API",
      "fieldSetName": "FS1"
    },
    {
      "description": "FS2",
      "fieldSetApiName": "FS2_API",
      "fieldSetName": "FS2"
    },
    {
      "description": "FS3",
      "fieldSetApiName": "FS3_API",
      "fieldSetName": "FS3"
    }
  ],
  "objectName": "BenefitDisbursement"
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
fieldSets	Field Set Output []	List of field sets of the benefit disbursement object.	Small, 59.0	59.0
objectName	String	Name of the benefit disbursement object whose field sets you want to retrieve.	Small, 59.0	59.0

Field Set Output

Output representation of the details of a field set.

Property Name	Type	Description	Filter Group and Version	Available Version
description	String	Description of the field set.	Small, 59.0	59.0
fieldSetApiName	String	API name of the field set.	Small, 59.0	59.0
fieldSetName	String	Name of the field set.	Small, 59.0	59.0

Generate Benefit Session Output

Output representation of the request to create a benefit schedule session.

Property Name	Type	Description	Filter Group and Version	Available Version
message	String	The message that provides the request response details.	Small, 57.0	57.0
success	Boolean	Indicates whether the request was successful (<code>true</code>) or not (<code>false</code>).	Small, 57.0	57.0

Preview Benefit Sessions Output

Output representation of the benefit scheduling session preview request.

Property Name	Type	Description	Filter Group and Version	Available Version
sessions	Benefit Sessions []	Specifies the list of the benefit sessions that have been returned for preview.	Small, 57.0	57.0

Program Enrollments Output

Output representation of the request to enroll or update participants in a program.

Property Name	Type	Description	Filter Group and Version	Available Version
message	String	The message that provides the request response details.	Small, 57.0	57.0
success	Boolean	Indicates whether the request was successful (<code>true</code>) or not (<code>false</code>).	Small, 57.0	57.0

Standard Object Details

Output representation of the details of gift transactions.

Property Name	Type	Description	Filter Group and Version	Available Version
fields	Standard Field Details[]	List of gift transaction fields.	Small, 59.0	59.0
objectApiName	String	API name of the gift transaction.	Small, 59.0	59.0

Standard Field Details

Output representation of the field attributes in a gift transaction object.

Property Name	Type	Description	Filter Group and Version	Available Version
fieldApiName	String	API name of a field in the gift transaction object.	Small, 59.0	59.0
label	String	Label of a field in the gift transaction object.	Small, 59.0	59.0
type	String	Type of a field in the gift transaction object.	Small, 59.0	59.0
value	String	Value of a field in the gift transaction object.	Small, 59.0	59.0

CHAPTER 5 Case Management

In this chapter ...

- [Case Management Standard Objects](#)
- [Case Management Business API](#)

This guide provides objects and API information about Case Management for Nonprofits. Built on the platform, Case Management helps case managers assist participants in achieving their goals through individualized plans, collaborative tools, and full participant data.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions.

Case Management Standard Objects

Case Management data model provides objects and fields to manage cases and care plans for your nonprofit organization.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions.

CarePlan

Represents an instantiation of a care plan template for a particular individual in order to reach specific goals. This object is available in API version 55.0 and later.

CarePlanTemplate

Represents the template for a type of care plan that can be offered for a household scenario. This object is available in API version 55.0 and later.

CarePlanTemplateBenefit

Represents a junction between a care plan template and a benefit. This object stores the benefit details of a care plan. This object is available in API version 55.0 and later.

CarePlanTemplateGoal

Represents a junction between a care plan template and a goal definition. This object stores the goal details of a care plan template. This object is available in API version 55.0 and later.

CaseParticipant

Represents a junction between a case, and an account or a contact. This object stores the details of the participant associated with a case. This participant could be the applicant, co-applicant, a household, or even a business account. This object is available in API version 54.0 and later.

ComplaintCase

Represents the association between a public complaint and its corresponding case. This object is available in API version 52.0 and later.

ComplaintParticipant

Represents a junction between a public complaint, and an account or a contact. This object stores the details of the participant who registers a complaint with the authorities. This participant could be the applicant, co-applicant, a household, or even a business account. This object is available in API version 54.0 and later.

GoalAssignment

Represents the assignment of a goal. This object is available in API version 55.0 and later.

GoalDefinition

Represents a goal or a business objective that's used as a reference. When instantiated, GoalDefinition records create GoalAssignment records that serve as goals in care plans.

Interaction

Represents an interaction (phone call, in-person meeting, or video conference) between two or more people (attendees), typically including at least one representative and one customer or partner.

InteractionAttendee

Represents an attendee of an interaction.

InteractionRelatedAccount

Represents a junction between an interaction and account that's related to that interaction.

InteractionSummary

Represents the summary of an interaction, including confidentiality information.

[InteractionSumDiscussedAccount](#)

Represents information about the companies discussed in an interaction.

[PublicComplaint](#)

Represents the complaints submitted by public users. This object is available in API version 49.0 and later.

[Referral](#)

Represents the information on client referrals in an organization. This object is available in API version 56.0 and later.

CarePlan

Represents an instantiation of a care plan template for a particular individual in order to reach specific goals. This object is available in API version 55.0 and later.



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

Supported Calls

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

Fields

Field	Details
CarePlanTemplateId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The care plan template associated with the care plan. This is a relationship field. Relationship Name CarePlanTemplate Relationship Type Lookup Refers To CarePlanTemplate
CaseId	Type reference Properties Create, Filter, Group, Sort, Update Description The case associated with the care plan.

Field	Details
	This is a relationship field. Relationship Name Case Relationship Type Master-Detail Refers To Case
CaseProceedingResultId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The outcome of a legal case for a participant. This field is a relationship field. Available with a Public Sector Solutions license and in API version 58.0 and later. Relationship Name CaseProceedingResult Relationship Type Lookup Refers To CaseProceedingResult
ClaimId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The claim with which the care plan is associated. Available with a Public Sector Solutions license and in API version 59.0 and later. This field is a relationship field. Relationship Name Claim Relationship Type Lookup Refers To Claim
Description	Type textarea

Field	Details
	Properties Create, Nillable, Update Description The description for the care plan record.
EndDate	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The date until when the care plan is effective.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The most recent date on which a user referenced this record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The most recent date on which a user viewed this record.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the care plan record.
ParticipantId	Type reference Properties Create, Filter, Group, Sort, Update Description The account associated with the care plan. This is a polymorphic relationship field.

Field	Details
	Relationship Name Participant Relationship Type Lookup Refers To Account, Contact
StartDate	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The date from when the care plan is effective.
Status	Type picklist Properties Create, Filter, Group, Sort, Update Description Specifies the status of the care plan. Possible values are: - Active - Cancelled - Completed - Draft - Proposed
TaskJobStatus	Type picklist Properties Filter, Group, Nillable, Restricted picklist, Sort Description Specifies the status of the task in the task queue. Possible values are: - Completed - Failed - InProgress - Submitted

Field	Details
TaskJobStatusMessage	Type textarea
	Properties Nillable
	Description The message that describes the status of the task in the queue.

Associated Objects

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

CarePlanFeed

Feed tracking is available for the object.

CarePlanHistory

History is available for tracked fields of the object.

CarePlanTemplate

Represents the template for a type of care plan that can be offered for a household scenario. This object is available in API version 55.0 and later.

Supported Calls

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

Fields

Field	Details
Description	Type textarea
	Properties Create, Nillable, Update
	Description The description of the care plan template record.
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort

Field	Details
	Description The most recent date on which a user referenced this record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The most recent date on which a user viewed this record.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the care plan template record.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description ID of the care plan template record owner. This is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
Status	Type picklist Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update Description Specifies the status of the care plan template. Possible values are: • Draft • Inactive • Published

Field	Details
	The default value is 'Draft'.

CarePlanTemplateBenefit

Represents a junction between a care plan template and a benefit. This object stores the benefit details of a care plan. This object is available in API version 55.0 and later.



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

Supported Calls

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

Fields

Field	Details
BenefitId	Type reference Properties Create, Filter, Group, Sort, Update Description The name of the care plan template benefit record. This is a relationship field. Relationship Name Benefit Relationship Type Lookup Refers To Benefit
CarePlanTemplateId	Type reference Properties Create, Filter, Group, Sort Description The care plan template associated with the care plan template benefit. This is a relationship field. Relationship Name CarePlanTemplate

Field	Details
	Relationship Type Master-Detail Refers To CarePlanTemplate
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The most recent date on which a user referenced this record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The most recent date on which a user viewed this record.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description The name of the care plan template benefit record.
Priority	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the priority of the care plan template benefit. Possible values are: • High • Low • Medium

CarePlanTemplateGoal

Represents a junction between a care plan template and a goal definition. This object stores the goal details of a care plan template. This object is available in API version 55.0 and later.



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

Supported Calls

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

Fields

Field	Details
CarePlanTemplateId	Type reference Properties Create, Filter, Group, Sort Description The care plan template associated with the care plan template goal. This is a relationship field. Relationship Name CarePlanTemplate Relationship Type Master-Detail Refers To CarePlanTemplate
GoalDefinitionId	Type reference Properties Create, Filter, Group, Sort, Update Description The goal definition associated with the care plan template goal. This is a relationship field. Relationship Name GoalDefinition Relationship Type Lookup Refers To GoalDefinition

Field	Details
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The most recent date on which a user referenced this record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The most recent date on which a user viewed this record.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description The name of the care plan template goal.
Priority	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the priority of the care plan template goal. Possible values are: • High • Low • Medium

CaseParticipant

Represents a junction between a case, and an account or a contact. This object stores the details of the participant associated with a case. This participant could be the applicant, co-applicant, a household, or even a business account. 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 Calls

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

Fields

Field	Details
AuthorizationProof	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description How the participant communicated their consent. This field is available in API version 58.0 and later. Possible values are: - Email Consent - Joint Ownership - Power of Attorney - Verbal Consent
CaseId	Type reference Properties Create, Filter, Group, Sort, Update Description The case associated with the case participant record. This field is a relationship field. Relationship Name Case Relationship Type Master-Detail Refers To Case
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The most recent date on which a user referenced this record.

Field	Details
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The most recent date on which a user viewed this record.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description The name of the case participant record.
ParticipantId	Type reference Properties Create, Filter, Group, Sort, Update Description The participant associated with the case participant record. This field is a polymorphic relationship field. Relationship Name Participant Relationship Type Lookup Refers To Account, Contact
PreferredCallTimeFrom	Type time Properties Create, Filter, Nillable, Sort, Update Description The start of the preferred time window for contacting the participant. This field is available in API version 58.0 and later.
PreferredCallTimeTo	Type time Properties Create, Filter, Nillable, Sort, Update

Field	Details
	Description The end of the preferred time window for contacting the participant. This field is available in API version 58.0 and later.
PreferredCommunicationMode	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description How the participant prefers to receive messages. This field is available in API version 58.0 and later. Possible values are: • Email • Phone • SMS
Role	Type picklist Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update Description Specifies the role of the case participant. Possible values are: • Applicant • Inspection Officer • Lawyer • Observer • Perpetrator • Primary Caretaker • Victim The default value is Applicant.
Status	Type picklist Properties Create, Filter, Group, Sort, Update Description Specifies the status of the case participant. Possible values are: • Active

Field	Details
	Inactive

ComplaintCase

Represents the association between a public complaint and its corresponding case. This object is available in API version 52.0 and later.

When a public complaint is raised on the portal, multiple department could be involved and each department can create a case record to track how the complaint is handled. For example, a hazardous chemical complaint can be handled by both the environmental agency and the fire department.

Supported Calls

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

Fields

Field	Details
CaseId	Type reference Properties Create, Filter, Group, Sort, Update Description The name of the case that is associated with the complaint. This is a relationship field. Relationship Name Case Relationship Type Lookup Refers To Case
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The most recent date on which a user referenced this record.
LastViewedDate	Type dateTime

Field	Details
	Properties Filter, Nillable, Sort Description The most recent date on which a user viewed this record.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description The ID of the complaint being raised.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The ID of the complaint case record owner. This is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
PublicComplaintId	Type reference Properties Create, Filter, Group, Sort, Update Description The name of the public complaint that is associated to the complaint being raised. This is a relationship field. Relationship Name PublicComplaint Relationship Type Lookup Refers To PublicComplaint

ComplaintParticipant

Represents a junction between a public complaint, and an account or a contact. This object stores the details of the participant who registers a complaint with the authorities. This participant could be the applicant, co-applicant, a household, or even a business account. 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.

When Compliant Data Sharing is enabled for the Public Complaint object, a complaint participant represents information about a user or group of participants who have access to a public complaint.

Supported Calls

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

Fields

Field	Details
Comments	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The comments about why the participant has access to the public complaint. Available in API version 62.0 and later, when Compliant Data Sharing is enabled for the Public Complaint object.
IsActive	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Specifies whether the participant's association with the public complaint is active (true) or not (false). The default value is <code>false</code>. Available in API version 62.0 and later, when Compliant Data Sharing is enabled for the Public Complaint object.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort

Field	Details
	Description The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description The name of the complaint participant record.
ParticipantId	Type reference Properties Create, Filter, Group, Sort, Update Description The participant associated with the complaint participant record. This field is a polymorphic relationship field. Relationship Name Participant Refers To Account, Contact, Group, User
ParticipantRoleId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The participant role associated with the complaint participant record. This field is a relationship field. Available in API version 62.0 and later, when Compliant Data Sharing is enabled for the Public Complaint object. Relationship Name ParticipantRole

Field	Details
	Refers To ParticipantRole
PublicComplaintId	Type reference Properties Create, Filter, Group, Sort Description The public complaint associated with the complaint participant record. This field is a relationship field. Relationship Name PublicComplaint Relationship Type Master-Detail Refers To PublicComplaint
Role	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the role of the complaint participant. Possible values are: - Observer - Perpetrator - Reporter - Victim The new Nillable property is available in API version 58.0 and later.
Status	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the status of the complaint participant. Possible values are: - Active - Inactive The default value is Active.

Associated Objects

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

ComplaintParticipantFeed

Feed tracking is available for the object.

ComplaintParticipantHistory

History is available for tracked fields of the object.

GoalAssignment

Represents the assignment of a goal. This object is available in API version 55.0 and later.

Supported Calls

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

Special Access Rules

This object is available if Program and Benefit Management is enabled in your org. To access the object, you need the Program and Benefit Management Access permission set or the Program and Benefit Management permission set license.

Fields

Field	Details
CompletionDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date when the goal is completed.
CompletionPercentage	Type percent Properties Create, Defaulted on create, Filter, Nillable, Sort, Update Description Indicates the progress made on the assigned goal in percentage.
CustomGoalName	Type string Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description A custom name that can be defined for the goal assignment. If this field is empty, the goal definition name is used for the goal assignment. This field is available from API version 63.0 and later.
Description	Type textarea Properties Create, Nillable, Update Description The description of the goal assignment record.
GoalAssigneeId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The assignees associated with the goal assignment. This is a polymorphic relationship field. Relationship Name GoalAssignee Relationship Type Lookup Refers To Account, Contact
GoalDefinitionId	Type reference Properties Create, Filter, Group, Sort, Update Description The goal definition associated with the goal assignment. This is a relationship field. Relationship Name GoalDefinition Relationship Type Lookup Refers To GoalDefinition

Field	Details
DescriptionCodeId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The system-defined code that represents the description of a standardized goal. This field is a polymorphic relationship field. Available in API version 61.0 and later. Relationship Name DescriptionCode Relationship Type Lookup Refers To CodeSet, CodeSetBundle
GoalType	Type string Properties Filter, Group, Nillable, Sort Description Specifies if the goal applies to a group or an individual.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The most recent date on which a user referenced this record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The most recent date on which a user viewed this record.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort

Field	Details
	Description The name of the goal assignment record.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description ID of the goal assignment record owner. This is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
ParentRecordId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The care plan or benefit assignment object associated with the goal assignment. This is a polymorphic relationship field. Relationship Name ParentRecord Relationship Type Lookup Refers To BenefitAssignment, CarePlan
Priority	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the priority of the goal assignment. Possible values are: • High • Low

Field	Details
	• Medium
StartDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The start date of the assigned goal.
Status	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update Description Specifies the status of the assigned goal. Possible values are: • Canceled • Completed • In Progress • Not Started The default value is 'Not Started'.
TargetCompletionDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date by when the assigned goal is targeted to be completed.

Associated Objects

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

GoalAssignmentFeed

Feed tracking is available for the object.

GoalAssignmentHistory

History is available for tracked fields of the object.

GoalAssignmentOwnerSharingRule

Sharing rules are available for the object.

GoalAssignmentShare

Sharing is available for the object.

GoalDefinition

Represents a goal or a business objective that's used as a reference. When instantiated, GoalDefinition records create GoalAssignment records that serve as goals in care plans.

Supported Calls

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

Fields

Field	Details
Category	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The category that the defined goal belongs to.
Description	Type textarea Properties Create, Nillable, Update Description The description of the defined goal.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort

Field	Details
	Description The timestamp when the current user last viewed this record or list view.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the goal definition record.
OwnerId	Type Polymorphic lookup Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The ID of the owner of this goal definition record. This field is a polymorphic relationship field. Relationship Name Owner Refers To - Group - User
ParentGoalId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The ID of the parent record. This field is a relationship field. Relationship Name ParentGoal Relationship Type Lookup Refers To GoalDefinition
Status	Type picklist

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The status of the goal defintion. Possible values are: • Active • Inactive The default value is <code>Active</code>.
Type	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the type of the defined goal. Possible values are: • Individual—Intermediate Goal • Strategic—Top Goal The default value is <code>Individual</code>.
UsageType	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the usage type of the defined goal.

Associated Objects

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

GoalDefinitionFeed

Feed tracking is available for the object.

GoalDefinitionHistory

History is available for tracked fields of the object.

GoalDefinitionShare

Sharing is available for the object.

Interaction

Represents an interaction (phone call, in-person meeting, or video conference) between two or more people (attendees), typically including at least one representative and one customer or partner.

Supported Calls

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

Fields

Field	Details
AccountId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The ID of the account related to the customer or partner who attended the interaction. Relationship Name Account Relationship Type Lookup Refers To Account
Description	Type textarea Properties Create, Nillable, Update Description The description of the interaction.
EndTime	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The date and time that the interaction ended.
InteractionType	Type picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update Description The type of interaction. Possible values are: • Conference • Email • In Person • Phone Call
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed a record related to this record.
LastSyncedDateTime	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The date and time when a sync was performed to create or update an interaction from an email client or other solutions in Salesforce.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
LocationId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The location of the interaction. Relationship Name Location

Field	Details
	Relationship Type Lookup Refers To Location
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description Required. The name of the interaction.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The ID of the record owner. Relationship Name Owner Relationship Type Lookup Refers To Group, User
ReferenceIdentifier	Type string Properties Create, Filter, Group, idLookup, Nillable, Sort, Update Description The unique reference ID of the interaction.
RelatedRecordId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The opportunity or financial deal associated with the interaction. This is a polymorphic relationship field. Relationship Name RelatedRecord

Field	Details
	Relationship Type Lookup Refers To FinancialDeal, Opportunity
StartTime	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The date and time that the interaction started.

Associated Objects

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

InteractionFeed

Feed tracking is available for the object.

InteractionHistory

History is available for tracked fields of the object.

InteractionOwnerSharingRule

Sharing rules are available for the object.

InteractionShare

Sharing is available for the object.

InteractionAttendee

Represents an attendee of an interaction.



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

Supported Calls

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

Fields

Field	Details
AttendeeResponse	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the response of the attendee to the interaction. Possible values are: - Accepted - Declined - Awaiting Response
AttendeeType	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The type of attendee. Possible values are: - External - Internal
ContactId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The contact who attended the interaction. Relationship Name Contact Relationship Type Lookup Refers To Contact
EmailAddress	Type email Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The email address of the attendee.
EventId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The event on Salesforce calendar for this attendee. Relationship Name Event Relationship Type Lookup Refers To Event
InteractionId	Type reference Properties Create, Filter, Group, Sort, Update Description Required. The interaction for which this attendee record is created. Relationship Name Interaction Relationship Type Master-Detail Refers To Interaction
IsOrganizer	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the attendee is the interaction organizer (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code> .
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort

Field	Details
	Description The timestamp for when the current user last viewed a record related to this record.
LastSyncedDateTime	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The date and time when a sync was performed to create or update an interaction from an email client or other solutions in Salesforce.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description The name of the interaction attendee.
UserId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The user who attended the interaction.

Associated Objects

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

InteractionAttendeeFeed

Feed tracking is available for the object.

InteractionAttendeeHistory

History is available for tracked fields of the object.

InteractionRelatedAccount

Represents a junction between an interaction and account that's related to that interaction.

Supported Calls

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

Fields

Field	Details
AccountId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The account of a company that's associated with the interaction. This field is a relationship field. Relationship Name Account Relationship Type Lookup Refers To Account
AccountRole	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the role of the account in the interaction. Possible values are: • Audit • Legal • Participating • Primary
Comment	Type textarea Properties Create, Nillable, Update

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

Associated Objects

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

InteractionRelatedAccountFeed

Feed tracking is available for the object.

InteractionRelatedAccountHistory

History is available for tracked fields of the object.

InteractionSummary

Represents the summary of an interaction, including confidentiality information.

Supported Calls

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

Fields

Field	Details
AccountId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The ID of the account related to the customer who attended the client interaction. Relationship Name Account Relationship Type Lookup Refers To Account
ConfidentialityType	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the level of confidentiality of the information that's recorded in this interaction summary. Possible values are: Confidential

Field	Details
	Public
InteractionId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The client interaction related to the interaction summary. Relationship Name Interaction Relationship Type Lookup Refers To Interaction
InteractionPurpose	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the purpose of the client interaction. Possible values are: - Deal Execution - Meet and Greet - Quarterly Check-In
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.

Field	Details
MeetingNotes	Type textarea Properties Create, Nillable, Update Description The detailed record of what transpired during the client interaction.
MeetingNotesStatus	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the status of the meeting notes. Available in API version 61.0 and later. Possible values are: • No • Yes
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description Required. The title of the interaction summary, capturing the summary of the interaction.
NextSteps	Type textarea Properties Create, Nillable, Update Description The next steps that were decided during the interaction.
Offering	Type multipicklist Properties Create, Filter, Nillable, Update Description The offerings that were discussed in the client interaction. Possible values are: • Debt Capital Markets • Equity Capital Markets

Field	Details
	Mergers and Acquisitions Advisory
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The ID of the record owner. Relationship Name Owner Relationship Type Lookup Refers To Group, User
PartnerAccountId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The ID of the account related to the partner who attended the client interaction. Relationship Name Partner Account Relationship Type Lookup Refers To Account
RelatedRecordId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The name of the record such as an opportunity associated with a client interaction. This is a polymorphic relationship field. Relationship Name RelatedRecord Relationship Type Lookup Refers To Application Form - Available in API version 62.0 and later

Field	Details
	• Benefit Assignment • Care Plan • Case • Case Participant • Contact • Complaint Participant • Goal Assignment • Opportunity • Public Complaint • Referral • Service Appointment • Visit
Status	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the status of the interaction summary. Possible values are: • Draft • Published

Associated Objects

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

InteractionSummaryFeed

Feed tracking is available for the object.

InteractionSummaryHistory

History is available for tracked fields of the object.

InteractionSummaryOwnerSharingRule

Sharing rules are available for the object.

InteractionSummaryShare

Sharing is available for the object.

InteractionSumDiscussedAccount

Represents information about the companies discussed in an interaction.

Supported Calls

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

Fields

Field	Details
Comment	Type textarea Properties Create, Nillable, Update Description Notes about the account that's associated with the interaction summary.
DiscussedAccountId	Type reference Properties Create, Filter, Group, Sort, Update Description The company or organization mentioned in the interaction summary. This is a relationship field. Relationship Name DiscussedAccount Relationship Type Lookup Refers To Account
InteractionSummaryId	Type reference Properties Create, Filter, Group, Sort, Update Description Required. The interaction summary associated with the interaction summary account record. This is a relationship field. Relationship Name InteractionSummary Relationship Type Lookup Refers To InteractionSummary

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

Associated Objects

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

InteractionSumDiscussedAccountFeed

Feed tracking is available for the object.

InteractionSumDiscussedAccountHistory

History is available for tracked fields of the object.

PublicComplaint

Represents the complaints submitted by public users. This object is available in API version 49.0 and later.

Supported Calls

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

Fields

Field	Details
AccountId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description ID of the account associated with this complaint. Relationship Name Account Relationship Type Lookup Refers To Account
BusinessAddress	Type textarea Properties Create, Filter, Nillable, Sort, Update Description Address of the business.
BusinessName	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description Name of the business
CauseSubtype	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The subtype of complaint cause. This field is available in API version 58.0 and later. Possible value is: • Misleading advertisement or documentation
CauseType	Type picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update Description The type of complaint cause. This field is available in API version 58.0 and later. Possible value is: Product Communication
Comments	Type textarea Properties Create, Nillable, Update Description Additional details about the complaint. This field is available in API version 51.0 and later.
CompensationAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description Any amount of money offered to resolve the complaint. This field is available in API version 58.0 and later.
ComplaintCaseId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description This field is deprecated as of API version 49.0.
ComplaintCaseStatus	Type picklist Properties Defaulted on create, Filter, Group, Nillable, Sort Description The status of the related Case. This field is available in API version 58.0 and later. Possible values are: - New - Working - Escalated - Closed

Field	Details
	The default is <code>New</code> .
ComplaintSubType	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Subtype of the complaint. Possible values are: • Burns • Educational Neglect • Emotional Neglect • Exploitation • Fire Safety • Isolation • Medical Neglect • Physical Neglect • Rough Treatment • Sexual Activities • Sexual Exploitation • Sexual Exposure • Suffocation • Terror
ComplaintSummary	Type textarea Properties Create, Nillable, Update Description A summary of the complaint information. This field is available in API version 64.0 and later.
ComplaintType	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Type of complaint. Possible values are:

Field	Details
	• Mental Abuse • Neglect • Physical Abuse • Safety • Sexual Abuse
Description	Type textarea Properties Create, Nillable, Update Description Description of the complaint. Description is filterable and sortable in API version 61.0 and earlier.
Email	Type email Properties Create, Filter, Group, Nillable, Sort, Update Description Email of the complainant.
EscalationCause	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The reason the complaint was escalated. This field is available in API version 58.0 and later. Possible values are: • Alleged ADA Violation • Alleged Discrimination • Alleged MLA Violation • Alleged SCRA Violation • Alleged UDAAP Violation • Consumer Protection Agency Involvement • Lawsuit Filed • Media Involvement • None • Received by Executive Leadership The default is None.

Field	Details
FirstName	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description First name of the complainant.
IncidentDate	Type date Properties Create, Filter, Group, Sort, Update Description Date of the incident.
IsComplainantAuthorized	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Whether the person who filed the complaint is an authorized representative of the Account. This field is available in API version 58.0 and later. The default value is <code>false</code>.
IsReporterConfidential	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Reporter's request for confidentiality. The default value is <code>false</code>.
LastName	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description Last name of the complainant.
LastReferencedDate	Type dateTime

Field	Details
	Properties Filter, Nillable, Sort Description The most recent date that a user referenced this record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The most recent date that a user viewed this record.
MobileNumber	Type phone Properties Create, Filter, Group, Nillable, Sort, Update Description Mobile number of the complainant.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description Name of the complaint.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description ID of the complaint owner. Relationship Name Owner Relationship Type Lookup Refers To Group, User
Priority	Type picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update Description Priority of the complaint. Possible values are: • Critical • High • Low • Medium
ProductType	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The product that the complaint is about. This field is available in API version 58.0 and later. Possible values are: • ATM / debit card • Credit Card or Prepaid Card • Insurance • Investments • Merchant Services • Mobile / electronic banking • Money transfers, virtual currency, and money services • Mortgage / Home Finance • Other • Personal Loan / other loans • Vehicle loan or lease
ReceivedDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date the complaint was received. This field is available in API version 58.0 and later.
ReporterAddress	Type textarea

Field	Details
	Properties Create, Filter, Nillable, Sort, Update Description Address of the reporter for further communication.
ReporterCategory	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Role of the reporter in the organization. Possible values are: • Childcare Providers • Healthcare worker • Law Enforcement • Medical Examiners • Mental Health Professionals • Other • School Personnel • Social Worker The default value is School Personnel.
ReporterOrganization	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description Organization that the reporter is part of.
ResolutionPriority	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description Indicates the priority for complaint resolution. This field is available in API version 64.0 and later.
ShouldInclInRegulatoryRpt	Type boolean

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Whether this complaint must be included in a regulatory report. This field is available in API version 58.0 and later. The default value is <code>false</code>.
SourceType	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The source of the complaint. This field is available in API version 58.0 and later. Possible values are: • Branch • Consumer Protection Agency • Contact Centre • Mobile App • Regulatory Agency • Social Media • Web Chat
Status	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Status of the complaint. Possible values are: • In Review • Resolved • Submitted
Subject	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description Subject of the complaint. This field is available in API version 51.0 and later.

Associated Objects

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

PublicComplaintFeed

Feed is available for the object.

PublicComplaintHistory

History is available for the object.

PublicComplaintOwnerSharingRule

Sharing rules are available for the object.

PublicComplaintShare

Sharing is available for the object.

Referral

Represents the information on client referrals in an organization. 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
AuthorizationStatus	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the authorization status of the referral for the associated provider. Available in API version 61.0 and later. Possible values are: • Authorized • In Review • Rejected • Submitted
CaseId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The case associated with the referral.

Field	Details
	This field is a relationship field. Relationship Name Case Relationship Type Lookup Refers To Case
Category	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The category of referral.
ClientEmail	Type email Properties Create, Filter, Group, Nillable, Sort, Update Description The email address of the referred client.
ClientId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The account associated with the referred client. This field is a relationship field. Relationship Name Client Relationship Type Lookup Refers To Account
ClientLanguage	Type multipicklist Properties Create, Filter, Nillable, Update

Field	Details
	Description The languages that the referred client speaks. Possible values are: • Arabic • Chinese • Dutch • English • French • German • Hindi • Portuguese • Russian • Spanish
ClientName	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The name of the referred client.
ClientPhone	Type phone Properties Create, Filter, Group, Nillable, Sort, Update Description The phone number of the referred client.
Comments	Type textarea Properties Create, Nillable, Update Description Additional details about the referral.
Description	Type textarea Properties Create, Nillable, Update

Field	Details
	Description The description of the referral.
IsSelfReferred	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the referral is made by the client. The default value is <code>false</code> .
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view. If this value is null, the user might have only accessed this record or list view (<parname>LastReferencedDate</parname>) but not viewed it.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description Name of the referral.
OutboundSourceId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The source of an outbound referral.

Field	Details
	This field is a polymorphic relationship field. Relationship Name OutboundSource Relationship Type Lookup Refers To Benefit Assignment, Case, Referral
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description ID of the owner of this object. This field is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
Priority	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Indicates the priority of the referral. Possible values are: • Critical • High • Low • Medium
ProgramId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The program that's associated with the referral.

Field	Details
	This field is a relationship field. Relationship Name Program Relationship Type Lookup Refers To Program
ProviderEmail	Type email Properties Create, Filter, Group, Nillable, Sort, Update Description The email address of the person or the organization that the client is being referred to.
ProviderFacilityId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The practitioner or provider facility associated with the referral. Available in API version 59.0 and later. This field is a polymorphic relationship field. Relationship Name ProviderFacility Relationship Type Lookup Refers To CareProviderFacilitySpecialty, HealthcarePractitionerFacility
ProviderId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The account or contact associated with the person or the organization that the client is being referred to. This field is a polymorphic relationship field. Relationship Name Provider

Field	Details
	Relationship Type Lookup Refers To Account, Contact, HealthcareProvider
ProviderName	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The name of the person or the organization that the client is being referred to.
ProviderOrg	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The organization that the client is being referred to.
ProviderPhone	Type phone Properties Create, Filter, Group, Nillable, Sort, Update Description The phone number of the person or the organization that the client is being referred to.
RecordTypeId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description This field is a relationship field. Relationship Name RecordType Relationship Type Lookup Refers To RecordType
ReferralDate	Type date

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update Description The date on which the referral is received.
ReferralType	Type picklist Properties Create, Filter, Group, Restricted picklist, Sort, Update Description Specifies whether the referral is inbound or outbound. Possible values are: • INBOUND—Inbound • OUTBOUND—Outbound
ReferrerEmail	Type email Properties Create, Filter, Group, Nillable, Sort, Update Description The email address of the person or the organization that referred the client.
ReferrerId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The account or contact associated with the person or the organization that referred the client. This field is a polymorphic relationship field. Relationship Name Referrer Relationship Type Lookup Refers To Account, Contact
ReferrerName	Type string Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The name of the person or the organization that referred the client.
ReferrerOrg	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The organization that referred the client.
ReferrerPhone	Type phone Properties Create, Filter, Group, Nillable, Sort, Update Description The phone number of the person or the organization that referred the client.
Result	Type textarea Properties Create, Filter, Nillable, Sort, Update Description The outcome of the referral.
ResultCategory	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the category of the referral result. Possible values are: • Approved • Client Declined Services • Pending • Referred Elsewhere • Rejected
Source	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The source of the referral. Possible values are: • Application • Email • Message • Other • Phone • Social Media • Walk-In
Status	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the status of the referral. Possible values are: • Approved • Enrolled • In Review • New • Rejected
Title	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The title of the referral.
UsageType	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the usage of the referral.

Associated Objects

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

ReferralFeed

Feed tracking is available for the object.

ReferralHistory

History is available for tracked fields of the object.

ReferralOwnerSharingRule

Sharing rules are available for the object.

ReferralShare

Sharing is available for the object.

Case Management Business API

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

Case Management has these resources.

Resource	Description
/connect/careplan/care-plans/\${carePlanId}/tasks	Create tasks for benefits and goals in a care plan.
/connect/careplan/care-plans/\${carePlanId}/tasks	Update tasks for benefits and goals in a care plan.
/connect/careplan/care-plans/\${carePlanId}/tasks	Get tasks for benefits and goals in a care plan.

EDITIONS

Available in: Lightning Experience

Available in: Case Management is available with Enterprise, Unlimited, and Performance Editions with the Impact Cloud.

REST Reference

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

REST Reference

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

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

Requests

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

[Resources](#)

Here’s a list of Case Management Business API resources.

[Responses](#)

Here’s a list of Case Management Business API response bodies.

Requests

Here’s a list of Case Management Business API request bodies.

[Create Care Plan Tasks Input](#)

Input representation of the request to create care plan task.

[Update Care Plan Tasks Input](#)

Input representation of the request to update care plan task.

Create Care Plan Tasks Input

Input representation of the request to create care plan task.

Root XML tag

<CarePlanTasksInputRepresentation>

JSON example

```
{
  "tasks": {
    "records": [
      {
        "subject": "Update CP Edit GOAL ASSIGNEMENT Task 990",
        "dueDate": "2023-19-08T00:00:00.000Z",
        "status": "Not Started",
        "priority": "Low",
        "comment": "Update CP Edit GOAL ASSIGNEMENT Task 990",
        "assignedTo": "005xx000001YkA1AAK",
        "id": "00Txx000003rMTcEAM"
      }
    ]
  }
}
```

Properties

Parameter Name	Type	Description	Required or Optional	Available Version
carePlanId	String	ID of the care plan or case for a given care team.	Required	56.0
subject	String	Subject of the task assigned to the care plan.	Optional	56.0

Parameter Name	Type	Description	Required or Optional	Available Version
dueDate	String	Due date of the task assigned to the care plan.	Optional	56.0
status	String	Status of the task assigned to the care plan, such as In Progress or Completed.	Optional	56.0
priority	String	Priority of the task assigned to the care plan.	Optional	56.0
comment	String	Comments made on the care plan task.	Optional	56.0
assignedTo	String	ID of the user who is assigned the task.	Optional	56.0
id	String	ID of the task record assigned to the care plan.	Optional	56.0

Update Care Plan Tasks Input

Input representation of the request to update care plan task.

Root XML tag

```
<CarePlanTasksInputRepresentation>
```

JSON example

```
{
  "tasks": {
    "records": [
      {
        "subject": "Update CP Edit GOAL ASSIGNEMENT Task 990",
        "dueDate": "2023-19-08T00:00:00.000Z",
        "status": "Not Started",
        "priority": "Low",
        "comment": "Update CP Edit GOAL ASSIGNEMENT Task 990",
        "assignedTo": "005xx000001YkA1AAK",
        "id": "00Txx000003rMTcEAM"
      }
    ]
  }
}
```

Properties

Parameter Name	Type	Description	Required or Optional	Available Version
carePlanId	String	ID of the care plan or case for a given care team.	Required	56.0
subject	String	Subject of the task assigned to the care plan.	Optional	56.0

Parameter Name	Type	Description	Required or Optional	Available Version
dueDate	String	Due date of the task assigned to the care plan.	Optional	56.0
status	String	Status of the task assigned to the care plan, such as In Progress or Completed.	Optional	56.0
priority	String	Priority of the task assigned to the care plan.	Optional	56.0
comment	String	Comments made on the care plan task.	Optional	56.0
assignedTo	String	ID of the user who is assigned the task.	Optional	56.0
id	String	ID of the task record assigned to the care plan.	Optional	56.0

Resources

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

[Create Care Plan Tasks](#)

Create tasks for the benefits, goals and also at a care plan level.

[Update Care Plan Tasks](#)

Resource for updating care plan task.

[Get Care Plan Tasks](#)

Resource for getting care plan task.

Create Care Plan Tasks

Create tasks for the benefits, goals and also at a care plan level.

Resource

```
/connect/careplan/care-plans/${carePlanId}/tasks
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v56.0/connect/careplan/care-plans/carePlanId/tasks
```

Available version

56.0

HTTP methods

POST

Request parameters for POST

Root XML tag

```
<CarePlanTasksInputRepresentation>
```

JSON example

```
{
  "tasks": {
    "records": [
      {
        "subject": "Update CP Edit GOAL ASSIGNEMENT Task 990",
        "dueDate": "2023-19-08T00:00:00.000Z",
        "status": "Not Started",
        "priority": "Low",
        "comment": "Update CP Edit GOAL ASSIGNEMENT Task 990",
        "assignedTo": "005xx000001YkA1AAK",
        "id": "00Txx000003rMTcEAM"
      }
    ]
  }
}
```

Properties

Parameter Name	Type	Description	Required or Optional	Available Version
carePlanId	String	ID of the care plan or case for a given care team.	Required	56.0
subject	String	Subject of the task assigned to the care plan.	Optional	56.0
dueDate	String	Due date of the task assigned to the care plan.	Optional	56.0
status	String	Status of the task assigned to the care plan, such as In Progress or Completed.	Optional	56.0
priority	String	Priority of the task assigned to the care plan.	Optional	56.0
comment	String	Comments made on the care plan task.	Optional	56.0
assignedTo	String	ID of the user who is assigned the task.	Optional	56.0
id	String	ID of the task record assigned to the care plan.	Optional	56.0

Response body for POST

[Create Care Plan Task Output](#)

Update Care Plan Tasks

Resource for updating care plan task.

Resource

```
/connect/careplan/care-plans/carePlanId/tasks
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v56.0/connect/careplan/care-plans/carePlanId/tasks
```

Available version

56.0

HTTP methods

PATCH

Request parameters for PATCH**Root XML tag**

```
<CarePlanTasksInputRepresentation>
```

JSON example

```
{
  "tasks": {
    "records": [
      {
        "subject": "Update CP Edit GOAL ASSIGNEMENT Task 990",
        "dueDate": "2023-19-08T00:00:00.000Z",
        "status": "Not Started",
        "priority": "Low",
        "comment": "Update CP Edit GOAL ASSIGNEMENT Task 990",
        "assignedTo": "005xx000001YkA1AAK",
        "id": "00Txx000003rMTcEAM"
      }
    ]
  }
}
```

Properties

Parameter Name	Type	Description	Required or Optional	Available Version
carePlanId	String	ID of the care plan or case for a given care team.	Required	56.0
subject	String	Subject of the task assigned to the care plan.	Optional	56.0
dueDate	String	Due date of the task assigned to the care plan.	Optional	56.0
status	String	Status of the task assigned to the care plan, such as In Progress or Completed.	Optional	56.0
priority	String	Priority of the task assigned to the care plan.	Optional	56.0

Parameter Name	Type	Description	Required or Optional	Available Version
comment	String	Comments made on the care plan task.	Optional	56.0
assignedTo	String	ID of the user who is assigned the task.	Optional	56.0
id	String	ID of the task record assigned to the care plan.	Optional	56.0

Response body for PATCH

[Update Care Plan Task Output](#)

Get Care Plan Tasks

Resource for getting care plan task.

Resource

```
/connect/careplan/care-plans/carePlanId/tasks
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v56.0/connect/careplan/care-plans/carePlanId/tasks
```

Available version

56.0

HTTP methods

GET

Response body for GET

[Get Care Plan Task Output](#)

Responses

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

[Create Care Plan Task](#)

Output representation of the request to create a care plan task.

[Update Care Plan Task](#)

Output representation of the request to update a care plan task.

[Get Care Plan Tasks](#)

Output representation of the request to get care plan task.

Create Care Plan Task

Output representation of the request to create a care plan task.

Property Name	Type	Description	Filter Group and Version	Available Version
message	String	The message that provides the request response details.	Small, 56.0	56.0
success	Boolean	Indicates whether the request was successful (<code>true</code>) or not (<code>false</code>).	Small, 56.0	56.0

Update Care Plan Task

Output representation of the request to update a care plan task.

Property Name	Type	Description	Filter Group and Version	Available Version
message	String	The message that provides the request response details.	Small, 56.0	56.0
success	Boolean	Indicates whether the request was successful (<code>true</code>) or not (<code>false</code>).	Small, 56.0	56.0

Get Care Plan Tasks

Output representation of the request to get care plan task.

JSON example

```
{
  "carePlanTasks": {
    "adhocTasks": {
      "records": [
        {
          "subject": "Adhoc Task 19087899",
          "dueDate": "2022-08-09T00:00:00.000Z",
          "status": "In Progress",
          "priority": "High",
          "comment": "First Adhoc task 19082343254325",
          "assignedTo": "005xx000001YkA1AAK"
        },
        {
          "subject": "Adhoc Task 290889999",
          "dueDate": "2022-08-31T00:00:00.000Z",
          "status": "Not Started",
          "priority": "High",
          "comment": "Second Adhoc task 29083424324",
          "assignedTo": "005xx000001YkA1AAK"
        },
        {
          "subject": "Adhoc Task 390821324324",
          "dueDate": "2022-08-08T00:00:00.000Z",
          "status": "Not Started",
          "priority": "Low",

```

```

    "comment": "Third Adhoc task 39082343243245",
    "assignedTo": "005xx000001YkA1AAK"
  }
]
}
}
}

```

Properties

Property Name	Type	Description	Filter Group and Version	Available Version
subject	String	Subject of the task assigned to the care plan.	Small, 56.0	56.0
dueDate	String	Due date of the task assigned to the care plan.	Small, 56.0	56.0
status	String	Status of the task assigned to the care plan, such as In Progress or Completed.	Small, 56.0	56.0
priority	String	Priority of the task assigned to the care plan.	Small, 56.0	56.0
comment	String	Comments made on the care plan task.	Small, 56.0	56.0
assignedTo	String	ID of the user who is assigned the task.	Small, 56.0	56.0

CHAPTER 6 Outcome Management Standard Objects

In this chapter ...

- [ImpactStrategy](#)
- [ImpactStrategyAssignment](#)
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The Outcome Management data model provides objects and fields to define, measure, and evaluate an organization's outcome strategy.

ImpactStrategy

Represents a high-level strategy to affect change in an individual, population, stakeholder, or the environment. 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 in products that include the Outcome Management license where Outcome Management is enabled and the Manage Outcomes system permission is assigned to users.

Fields

Field	Details
Description	Type textarea Properties Create, Nillable, Update Description The description about the impact strategy.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description Date and time when a user last referenced this impact strategy.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description Date and time when a user last viewed this impact strategy.
Level	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Specifies the level or scope of the impact strategy. Possible values are: • Department • Organizational • Program
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the impact strategy.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The ID of the user who owns the impact strategy. This field is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
ParentImpactStrategyId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The associated parent impact strategy. This field is a relationship field. Relationship Name ParentImpactStrategy Relationship Type Lookup

Field	Details
	Refers To ImpactStrategy
Status	Type picklist Properties Create, Filter, Group, Sort, Update Description Specifies the status of the impact strategy. Possible values are: • Active • Canceled • Completed • Planned
Type	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the type of the impact strategy. Possible values are: • External Requirement • Logic Model • Strategic Plan • Theory of Change

Associated Objects

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

[ImpactStrategyFeed](#)

Feed tracking is available for the object.

[ImpactStrategyHistory](#)

History is available for tracked fields of the object.

[ImpactStrategyOwnerSharingRule](#)

Sharing rules are available for the object.

[ImpactStrategyShare](#)

Sharing is available for the object.

ImpactStrategyAssignment

Represents the connection between the impact strategy and the outcome or other object related to the impact strategy. This object is available in API version 59.0 and later.

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

Supported Calls

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

Special Access Rules

This object is available in products that include the Outcome Management license where Outcome Management is enabled and the Manage Outcomes system permission is assigned to users.

Fields

Field	Details
ImpactStrategyId	Type reference Properties Create, Filter, Group, Sort Description The impact strategy associated with this impact strategy assignment. This field is a relationship field. Relationship Name ImpactStrategy Relationship Type Master-Detail Refers To ImpactStrategy
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description Date and time when a user last referenced this impact strategy assignment.

Field	Details
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description Date and time when a user last viewed this impact strategy assignment.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description The unique number of the impact strategy assignment.
OutcomeId	Type reference Properties Create, Filter, Group, Sort, Update Description The outcome associated with this impact strategy assignment. This field is a relationship field. Relationship Name Outcome Relationship Type Lookup Refers To Outcome

Associated Objects

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

[ImpactStrategyAssignmentFeed](#)

Feed tracking is available for the object.

[ImpactStrategyAssignmentHistory](#)

History is available for tracked fields of the object.

IndicatorAssignment

Represents the assignment of an indicator definition that's used to measure the performance of an outcome or a related activity. This object is available in API version 59.0 and later.

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

Supported Calls

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

Special Access Rules

- This object is available in products that include the Outcome Management license where Outcome Management is enabled and the Manage Outcomes system permission is assigned to users.
- This object is available in Net Zero Cloud with a Growth license where the Manage Environmental, Social, and Governance Programs system permission is assigned to users.

Fields

Field	Details
IndicatorAssignmentType	Type picklist Properties Create, Filter, Group, Sort, Update Description Specifies the object that the indicator assignment measures. Possible values are: • Outcome • Program
IndicatorDefinitionId	Type reference Properties Create, Filter, Group, Sort Description The indicator definition that's associated with the indicator assignment. This field is a relationship field. Relationship Name IndicatorDefinition

Field	Details
	Relationship Type Master-Detail Refers To IndicatorDefinition
IntendedDirection	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the intended direction of change in the behavior, knowledge, skills, status, or level of functioning that's detailed in the parent indicator definition. Possible values are: - Decrease - Increase - Maintain
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate is not null, the user accessed this record or list view indirectly.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the indicator assignment.

Field	Details
OutcomeId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The outcome that the indicator assignment measures. This field is a relationship field. Relationship Name Outcome Relationship Type Lookup Refers To Outcome
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The owner of this indicator assignment. This field is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
ProgramId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The program that the indicator assignment measures. This field is a relationship field. Relationship Name Program Relationship Type Lookup

Field	Details
	Refers To Program
Status	Type picklist Properties Create, Filter, Group, Sort, Update Description Specifies the status of the indicator assignment. Possible values are: • Active • Canceled • Completed • Planned

Associated Objects

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

IndicatorAssignmentFeed

Feed tracking is available for the object.

IndicatorAssignmentHistory

History is available for tracked fields of the object.

IndicatorAssignmentOwnerSharingRule

Sharing rules are available for the object.

IndicatorAssignmentShare

Sharing is available for the object.

IndicatorDefinition

Represents information about the indicator assignment and the process of measuring and calculating the indicator results. 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 in products that include the Outcome Management license where Outcome Management is enabled and the Manage Outcomes system permission is assigned to users.
- This object is available in Net Zero Cloud with a Growth license where the Manage Environmental, Social, and Governance Programs system permission is assigned to users.

Fields

Field	Details
Description	Type textarea Properties Create, Filter, Nillable, Sort, Update Description The description of the indicator definition.
FlowDefinitionApiName	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The API name of the flow definition associated with the indicator definition. This field is available from API version 60.0 and later.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description Date and time when a user last referenced this indicator definition.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description Date and time when a user last viewed this indicator definition.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update

Field	Details
	Description The name of the indicator definition.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The ID of the user who owns the outcome. This field is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
Status	Type picklist Properties Create, Filter, Group, Sort, Update Description Specifies the status of the indicator definition. Possible values are: • Active • Canceled • Completed • Planned
UnitOfMeasureId	Type reference Properties Create, Filter, Group, Sort, Update Description The unit of measure for the target, baseline, and result values that are associated with this indicator definition. This field is a relationship field. Relationship Name UnitOfMeasure

Field	Details
	Relationship Type Lookup
	Refers To UnitOfMeasure

Associated Objects

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

IndicatorDefinitionFeed

Feed tracking is available for the object.

IndicatorDefinitionHistory

History is available for tracked fields of the object.

IndicatorDefinitionOwnerSharingRule

Sharing rules are available for the object.

IndicatorDefinitionShare

Sharing is available for the object.

IndicatorPerformancePeriod

Represents information about a specified time period including the frequency at which indicator results should be calculated and the baseline value of the indicator. This object is available in API version 59.0 and later.



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

Supported Calls

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

Special Access Rules

- This object is available in products that include the Outcome Management license where Outcome Management is enabled and the Manage Outcomes system permission is assigned to users.
- This object is available in Net Zero Cloud with a Growth license where the Manage Environmental, Social, and Governance Programs system permission is assigned to users.

Fields

Field	Details
BaselineDescription	Type textarea Properties Create, Filter, Nillable, Sort, Update Description The description of the baseline value.
BaselineValue	Type double Properties Create, Filter, Nillable, Sort, Update Description The value of the indicator assignment at the beginning of the indicator performance period.
Description	Type textarea Properties Create, Filter, Nillable, Sort, Update Description The description of the indicator performance period.
IndicatorAssignmentId	Type reference Properties Create, Filter, Group, Sort Description The indicator assignment that's associated with the indicator performance period. This field is a relationship field. Relationship Name IndicatorAssignment Relationship Type Master-Detail Refers To IndicatorAssignment
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort

Field	Details
	Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastResultMeasurementDate	Type date Properties Filter, Group, Nillable, Sort Description The date when the last result value was measured. This field is a calculated field.
LastResultValue	Type double Properties Filter, Nillable, Sort Description The result value from the most recently measured indicator result. This field is a calculated field.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate is not null, the user accessed this record or list view.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the indicator performance period.
TargetProgress	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the progress of the target within the time period.

Field	Details
	Possible values are: • At Risk • Complete • Not Met • Not Started • On Track
TargetValue	Type double Properties Create, Filter, Nillable, Sort, Update Description The target value of the indicator assignment within the time period.
TimePeriodId	Type reference Properties Create, Filter, Group, Sort, Update Description The time period that is associated with the indicator performance period. This field is a relationship field. Relationship Name TimePeriod Relationship Type Lookup Refers To TimePeriod

Associated Objects

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

IndicatorPerformancePeriodFeed

Feed tracking is available for the object.

IndicatorPerformancePeriodHistory

History is available for tracked fields of the object.

IndicatorResult

Represents the result of an indicator assignment for the specified time period that can be used to track the performance of the indicator. This object is available in API version 59.0 and later.

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

Supported Calls

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

Special Access Rules

- This object is available in products that include the Outcome Management license where Outcome Management is enabled and the Manage Outcomes system permission is assigned to users.
- This object is available in Net Zero Cloud with a Growth license where the Manage Environmental, Social, and Governance Programs system permission is assigned to users.

Fields

Field	Details
CalculationMethod	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Determines whether the indicator result was added manually or calculated by automation. This field is available from API version 60.0 and later. Possible values are: • <code>AutomaticallyCalculated</code> • <code>Manual</code>
Denominator	Type double Properties Create, Filter, Nillable, Sort Description The denominator in automatically-calculated results that are an average or percent. This field is available from API version 60.0 and later.

Field	Details
Description	Type textarea Properties Create, Filter, Nillable, Sort, Update Description The description of the indicator result.
FlowDefinitionApiName	Type string Properties Create, Filter, Group, Nillable, Sort Description The API name of the flow definition associated with this indicator result. This field is available from API version 60.0 and later.
FlowVersion	Type int Properties Create, Filter, Group, Nillable, Sort Description The version of the flow that calculated this result. This field is available from API version 60.0 and later.
IndicatorPerformancePeriodId	Type reference Properties Create, Filter, Group, Sort Description The indicator performance period for which the result is defined. This field is a relationship field. Relationship Name IndicatorPerformancePeriod Relationship Type Master-Detail Refers To IndicatorPerformancePeriod
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort

Field	Details
	Description Date and time when a user last referenced this indicator result.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description Date and time when a user last viewed this indicator result.
MeasurementDate	Type date Properties Create, Filter, Group, Sort, Update Description The date on which the indicator result is measured.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description The name of the indicator result.
Numerator	Type double Properties Create, Filter, Nillable, Sort Description The numerator in automatically-calculated results that are an average or percent. This field is available from API version 60.0 and later.
ResultValue	Type double Properties Create, Filter, Sort, Update Description The result for the indicator performance period.
Type	Type picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description Specifies the type of the result for the time period. Possible values are: - Final - Interim

Associated Objects

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

IndicatorResultFeed

Feed tracking is available for the object.

IndicatorResultHistory

History is available for tracked fields of the object.

Outcome

Represents information about the expected change in participants that is driven by the organization's activity. 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 in products that include the Outcome Management license where Outcome Management is enabled and the Manage Outcomes system permission is assigned to users.

Fields

Field	Details
Description	Type textarea
	Properties Create, Filter, Nillable, Sort, Update

Field	Details
	Description The description of the outcome.
IntendedDirection	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the intended direction of change in the behavior, knowledge, skills, status, or level of functioning that's detailed in the outcome. Possible values are: - Decrease - Increase - Maintain
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description Date and time when a user last referenced this outcome.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description Date and time when a user last viewed this outcome.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the outcome.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	Description The ID of the user who owns the outcome. This field is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
SourceName	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The name of the source that initially defined the outcome. For example, United Nations Sustainable Development Goals (UNSDG).
Status	Type picklist Properties Create, Filter, Group, Sort, Update Description Specifies the status of the outcome. Possible values are: • Active • Canceled • Completed • Planned
Term	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the term for which the outcome is defined. Possible values are: • Long-Term • Medium-Term • Short-Term

Associated Objects

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

OutcomeFeed

Feed tracking is available for the object.

OutcomeHistory

History is available for tracked fields of the object.

OutcomeOwnerSharingRule

Sharing rules are available for the object.

OutcomeShare

Sharing is available for the object.

OutcomeActivity

Represents a junction between Outcome and the object that's related to the activity undertaken by an organization to achieve that outcome. This object is available in API version 59.0 and later.

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

Supported Calls

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

Special Access Rules

This object is available in products that include the Outcome Management license where Outcome Management is enabled and the Manage Outcomes system permission is assigned to users.

Fields

Field	Details
BenefitId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The benefit that's associated with the outcome. This field is a relationship field. Relationship Name Benefit

Field	Details
	Relationship Type Lookup Refers To Benefit
GoalDefinitionId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The goal definition that's associated with the outcome. This field is available from API version 60.0 and later. This field is a relationship field. Relationship Name GoalDefinition Relationship Type Lookup Refers To GoalDefinition
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description Date and time when a user last referenced this outcome activity.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description Date and time when a user last viewed this outcome activity.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the outcome activity.

Field	Details
OutcomeActivityType	Type picklist Properties Create, Filter, Group, Sort, Update Description The type of activity that's associated with the outcome, such as program, benefit. Possible values are: • Benefit • Goal Definition This value is available from API version 60.0 and later. • Program
OutcomeId	Type reference Properties Create, Filter, Group, Sort Description The outcome that's associated with the outcome activity. This field is a relationship field. Relationship Name Outcome Relationship Type Master-Detail Refers To Outcome
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The owner of the record. This field is a polymorphic relationship field. This field is available from API version 63.0 and later. Relationship Name Owner Refers To Group, User
ProgramId	Type reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The program that's associated with the outcome. This field is a relationship field.
	Relationship Name Program
	Relationship Type Lookup
	Refers To Program

Associated Objects

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

OutcomeActivityShare

Sharing is available for the object.

OutcomeActivityOwnerSharingRule

Sharing rules are available for the object.

OutcomeActivityFeed

Feed tracking is available for the object.

OutcomeActivityHistory

History is available for tracked fields of the object.

TimePeriod

Represents the time period that's used to calculate the indicator performance and result. 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 in products that include the Outcome Management license where Outcome Management is enabled and the Manage Outcomes system permission is assigned to users.
- This object is available in Net Zero Cloud with a Growth license where the Manage Environmental, Social, and Governance Programs system permission is assigned to users.

Fields

Field	Details
EndDate	Type dateTime Properties Create, Filter, Sort, Update Description The end date and time of the time period.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description Date and time when a user last referenced this time period.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description Date and time when a user last viewed this time period.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the time period.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The ID of the user who owns the time period. This field is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup

Field	Details
	Refers To Group, User
StartDate	Type dateTime Properties Create, Filter, Sort, Update Description The start date and time of the time period.

Associated Objects

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

TimePeriodFeed

Feed tracking is available for the object.

TimePeriodHistory

History is available for tracked fields of the object.

TimePeriodOwnerSharingRule

Sharing rules are available for the object.

TimePeriodShare

Sharing is available for the object.

UnitOfMeasure

Represents the unit of measures for care metrics and care observations. This object is available in API version 49.0 and later.

Supported Calls

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

Fields

Field	Details
Description	Type string Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The description of this unit of measure.
ConversionFactor	Type double Properties Create, Filter, Nillable, Sort, Update Description The factor or rate that's used to convert this unit of measurement to the base unit.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of this unit of measure.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The ID of the user who owns this record.
Type	Type picklist

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The type of the unit of measure. For example, weight, distance, period.
Sequence	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The sequence number assigned to the unit of measure.
Status	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the status of the unit of measure. Possible values are: • Active • Draft • Inactive
UnitCode	Type string Properties Create, Filter, Group, Sort, Update Description The code for this unit of measure. For example, mm[Hg], mcg/mL, kgs, lbs.
UnitOfMeasureClassId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The class associated with the unit of measurement. This field is a relationship field. Relationship Name UnitOfMeasureClass Refers To UnitOfMeasureClass

Associated Objects

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

UnitOfMeasureChangeEvent (API version 59.0)

Change events are available for the object.

UnitOfMeasureOwnerSharingRule

Sharing rules are available for the object.

UnitOfMeasureShare

Sharing is available for the object.

CHAPTER 7 Grantmaking

In this chapter ...

- [Grantmaking Object Reference](#)
- [Grantmaking Fields on Other Objects](#)
- [Grantmaking Tooling API Object](#)
- [Grantmaking Metadata API Types](#)

This guide provides information about the objects and APIs that Grantmaking uses.

EDITIONS

Available in: Lightning Experience

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

Grantmaking Object Reference

The Grantmaking data model provides objects and fields to calculate and manage grants for your organization.

[ApplicationDecision](#)

Represents a final decision performed for the specified Application. This object is available in API version 56.0 and later.

[ApplicationRenderMethod](#)

Represents how a part of an application can be rendered. This object is available in Grantmaking API version 61.0 and later.

[ApplicationReview](#)

Represents a review performed against a specified Individual Application. This object is available in API version 56.0 and later.

[ApplicationStageDefinition](#)

Represents a stage of an application. This object is available in Grantmaking API version 61.0 and later.

[ApplicationTimeline](#)

Represents the milestone dates in the application process. This object is available in API version 57.0 and later.

[Budget](#)

Tracks an estimate of future revenue or expenses during a specific time period. This object is available in API version 53.0 and later.

[BudgetAllocation](#)

Represents a subsection of a Budget that shows where allocated resources are being applied. This object is available in API version 53.0 and later.

[BudgetCategory](#)

Represents the purpose of the budget line item. This object is available in API version 57.0 and later.

[BudgetCategoryValue](#)

Captures budget values for category and time period. This object is available in API version 57.0 and later.

[BudgetParticipant](#)

Represents information about a user or group of participants who have access to a budget. This object is available in API version 59.0 and later.

[BudgetPeriod](#)

Defines a distinct time interval in which the estimate applies. This object is available in API version 57.0 and later.

[FundingAward](#)

Represents an award given to an individual or organization to facilitate a goal related to the funder's mission. This object is available in API version 57.0 and later.

[FundingAwardAmendment](#)

Represents a modification to the scope or finances of a previously approved award. This object is available in API version 57.0 and later.

[FundingAwardParticipant](#)

Represents information about a user or group of participants who have access to a funding award. This object is available in API version 59.0 and later.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, and Unlimited** Editions in Nonprofit Cloud for Grantmaking

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions in Public Sector Solutions

[FundingAwardRequirement](#)

Represents a deliverable or milestone for a funding award or funding disbursement. This object is available in API version 57.0 and later.

[FundingAwardRqmtSection](#)

Represents a part of a funding award requirement to be completed or reviewed. This object is available in API version 62.0 and later.

[FundingDisbursement](#)

Represents a payment that has been made or scheduled to be made to a funding recipient. This object is available in API version 57.0 and later.

[FundingOpportunity](#)

The pool of money available for distribution for a specific purpose. This object is available in API version 57.0 and later.

[FundingOppParticipant](#)

Represents information about a user or group of participants who have access to a funding opportunity. This object is available in API version 60.0 and later.

[IndicatorAssignment](#)

Represents the assignment of an indicator definition that's used to measure the performance of an outcome or a related activity. This object is available in API version 59.0 and later.

[IndicatorPerformancePeriod](#)

Represents information about a specified time period including the frequency at which indicator results should be calculated and the baseline value of the indicator. This object is available in API version 59.0 and later.

[IndividualApplication](#)

Represents an application form submitted by an individual or organization. This object is available in API version 50.0 and later.

[IndividualApplicationTask](#)

Represents a task related to an application. This object is available in Grantmaking API version 61.0 and later.

[IndvApplicationTaskParticipant](#)

Represents information about a user or group of participants who have read or write access to an individual application task. This object is available in API version 61.0 and later.

[IndividualApplnParticipant](#)

Represents information about a user or group of participants who have access to a individual application. This object is available in API version 59.0 and later.

[OutcomeActivity](#)

Represents a junction between an outcome and the object that's related to the activity undertaken by an organization to achieve that outcome. This object is available in API version 59.0 and later.

[PreliminaryApplicationRef](#)

Represents the saved applications and pre-screening forms. This object is available in API version 49.0 and later.

[Program](#)

Represents information about the enrollment and disbursement of benefits in a program. This object is available in API version 57.0 and later.

ApplicationDecision

Represents a final decision performed for the specified Application. 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()`

Special Access Rules

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Application system permission is assigned to users.

Fields

Field	Details
ApplicationDecision	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the decision for the application. Possible values are: • Award • Deny
ApplicationId	Type reference Properties Create, Filter, Group, Sort, Update Description The ID of the application. This field is a polymorphic relationship field. Relationship Name Application Relationship Type Lookup Refers To IndividualApplication
Comment	Type textarea Properties Create, Nillable, Update Description The information about the decision provided on the application.

Field	Details
DecisionAuthorityId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The user responsible for the application decision. This field is a relationship field. Relationship Name DecisionAuthority Relationship Type Lookup Refers To User
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed this record.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description Name of the preliminary application.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description ID of the owner who owns the record.

Field	Details
	This field is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
PreliminaryApplicationRefId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The ID of the preliminary application reference. This field is a relationship field. Relationship Name PreliminaryApplicationRef Relationship Type Lookup Refers To PreliminaryApplicationRef

ApplicationRenderMethod

Represents how a part of an application can be rendered. This object is available in Grantmaking API version 61.0 and later.

Supported Calls

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

Special Access Rules

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Applications system permission is assigned to users.

Fields

Field	Details
Description	Type textarea

Field	Details
	Properties Create, Nillable, Update Description The description of the application render method.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate is not null, the user accessed this record or list view indirectly.
MethodName	Type textarea Properties Create, Nillable, Update Description The name of the render method associated with the application.
MethodRecordId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The record ID of the method that's associated with the application render method. This field is a polymorphic relationship field. Relationship Name MethodRecord Relationship Type Lookup Refers To OmniProcess, OmniUiCard

Field	Details
MethodType	Type picklist Properties Create, Filter, Group, Restricted picklist, Sort, Update Description Specifies the type of method that's used to render components in the application. Possible values are: • FlexCard • Flow • OmniScript
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the application render method.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description ID of the user who owns the record. This field is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
UsageType	Type picklist Properties Create, Filter, Group, Restricted picklist, Sort, Update Description Specifies the usage type of the application render method. Possible values are: • FormFramework This value is available from API version 63.0 and later.

Field	Details
	• <code>Grantmaking</code> • <code>Program</code> This value is available from API version 65.0 and later. • <code>Volunteer</code> This value is available from API version 65.0 and later. The default is <code>FormFramework</code>.

Associated Objects

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

ApplicationRenderMethodFeed

Feed tracking is available for the object.

ApplicationRenderMethodHistory

History is available for tracked fields of the object.

ApplicationRenderMethodShare

Sharing is available for the object.

ApplicationReview

Represents a review performed against a specified Individual Application. 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()`

Special Access Rules

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Application system permission is assigned to users.

Fields

Field	Details
<code>ApplicationCategory</code>	Type picklist Properties Filter, Group, Nillable, Sort Description Specifies the category of the application based on the decision period. Possible values are: • <code>Basic</code>

Field	Details
	• Special
ApplicationId	Type reference Properties Create, Filter, Group, Sort, Update Description The individual application associated with the application review. This field is a polymorphic relationship field. Relationship Name Application Relationship Type Lookup Refers To IndividualApplication
ApplicationRecommendation	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the reviewer's recommended outcome of the application. Possible values are: • Ask for Revisions • Award • Deny
ApplicationStageDefinitionId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The application stage definition that's associated with the application review. This field is a relationship field. Relationship Name ApplicationStageDefinition Relationship Type Lookup Refers To ApplicationStageDefinition

Field	Details
AssignedDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date when the application was assigned to the reviewer.
AssignedUserId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description Identifies the user assigned to perform the review. This field is a relationship field. Relationship Name AssignedUser Relationship Type Lookup Refers To User
Comment	Type textarea Properties Create, Nillable, Update Description The information about the review provided on the application.
Condition	Type textarea Properties Create, Nillable, Update Description The condition that's applicable to an applicant.
DisplayOrder	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The order in which the application review shows on a form.

Field	Details
DueDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The last date by which the application review should be completed.
EndDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date when the application review was completed.
IsAssignedToMe	Type boolean Properties Defaulted on create, Filter, Group, Sort Description Indicates whether the application review is assigned to the user who's logged in. The default value is <code>false</code>. This field is a calculated field.
IsRequired	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the application review is required (true) or not (false). The default value is <code>false</code>.
IsSubmitted	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the application review has been submitted. This field is available from API version 58.0 and later. The default value is <code>true</code>.

Field	Details
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed this record.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description Name of the application being reviewed.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The owner associated with this application review. This field is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
ReviewedById	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The user who reviewed the application.

Field	Details
	This field is a relationship field. Relationship Name ReviewedBy Relationship Type Lookup Refers To User
StartDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date when the application review started.
Status	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the status of the application review. Possible values are: • Canceled • Completed • Draft This value is available from API version 63.0 and later. • In Progress • Not Started
SubmissionDate	Type date Properties Filter, Group, Nillable, Sort Description The date when the applicant submitted the application.
Title	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The descriptive name for the application review.

Associated Objects

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

ApplicationReviewFeed

Feed tracking is available for the object.

ApplicationReviewHistory

History is available for tracked fields of the object.

ApplicationReviewOwnerSharingRule

Sharing rules are available for the object.

ApplicationReviewShare

Sharing is available for the object.

ApplicationStageDefinition

Represents a stage of an application. This object is available in Grantmaking API version 61.0 and later.

Supported Calls

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

Special Access Rules

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Applications system permission is assigned to users.

Fields

Field	Details
Description	Type textarea Properties Create, Nillable, Update Description The description of the application stage definition.
EditTypeAppRenderMethodId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The render method for an editable form or application that's associated with this application stage definition.

Field	Details
	This field is a relationship field. Relationship Name EditTypeAppRenderMethod Relationship Type Lookup Refers To ApplicationRenderMethod
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate is not null, the user accessed this record or list view indirectly.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the application stage definition.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description ID of the user who owns the record. This field is a polymorphic relationship field. Relationship Name Owner

Field	Details
	Relationship Type Lookup
	Refers To Group, User
Type	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description Specifies the type of the application stage definition. Possible values are: • <code>FormFramework</code> This value is available from API version 63.0 and later. • <code>Grantmaking</code> • <code>Program</code> This value is available from API version 65.0 and later. • <code>Volunteer</code> This value is available from API version 65.0 and later.
ViewTypeAppRenderMethodId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The render method for a read-only form or application that's associated with this application stage definition. This field is a relationship field.
	Relationship Name ViewTypeAppRenderMethod
	Relationship Type Lookup
	Refers To ApplicationRenderMethod

Associated Objects

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

ApplicationStageDefinitionFeed

Feed tracking is available for the object.

ApplicationStageDefinitionHistory

History is available for tracked fields of the object.

ApplicationStageDefinitionShare

Sharing is available for the object.

ApplicationTimeline

Represents the milestone dates in the application process. This object is available in API version 57.0 and later.

Supported Calls

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

Special Access Rules

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Application system permission is assigned to users.

Fields

Field	Details
ApplicationCloseDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The last date when applicants can apply for a grant.
ApplicationOpenDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date when applicants can start to apply for a grant.
DecisionReleaseDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date when the application decision is announced.
LastReferencedDate	Type dateTime

Field	Details
	Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed this record.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description Name of the application timeline being reviewed.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description ID of the owner who owns the record. This field is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
Type	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies which feature this application timeline record belongs to. Possible values are: • Grantmaking

Budget

Tracks an estimate of future revenue or expenses during a specific time period. This object is available in API version 53.0 and later.

Supported Calls

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

Special Access Rules

This object is available only if the Grants Management or Grantmaking license is enabled, Grants Management or Grantmaking is enabled, and the Manage Budgets system permission is assigned to users.

Fields

Field	Details
AccountId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The account associated with the budget. This field is available from API version 58.0 and later. This field is a relationship field. Relationship Name Account Relationship Type Lookup Refers To Account
Amount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The total amount of funds for a budget shown in currency format.
EstimatedUtilizationAmount	Type currency Properties Create, Filter, Nillable, Sort, Update

Field	Details
	Description The amount that's estimated to be utilized from the budget.
Description	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The description of the budget and its related business processes.
IsSubmitted	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the budget has been submitted. This field is available from API version 58.0 and later. The default value is <code>false</code> .
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed this record.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description Name of the budget.
OwnerId	Type reference

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update Description ID of the owner who owns the record. This field is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
ParentBudgetId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description ID of the associated parent budget. This field is available from API version 56.0 and later. This field is a relationship field. Relationship Name ParentBudget Relationship Type Lookup Refers To Budget
PeriodEndDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The end of the date range for which the budget applies.
PeriodName	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The name of the time period to which the budget applies.

Field	Details
PeriodStartDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The beginning of the date range for which the budget applies.
ProgramId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The program associated with the budget. This field is available from API version 58.0 and later. This field is a relationship field. Relationship Name Program Relationship Type Lookup Refers To Program
Quantity	Type double Properties Create, Filter, Nillable, Sort, Update Description The quantity used to track a budget for non-currency projects. For example, this could be number of hours or number of resources.
Status	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The status of the budget. Possible values are: • Active • Archived • Planned

Field	Details
Type	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Categorizes the budget by how it will be used. Possible values are: • Department • Program • Project
UtilizedAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The amount that has already been utilized from the budget.

Associated Objects

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

BudgetFeed

Feed tracking is available for the object.

BudgetHistory

History is available for tracked fields of the object.

BudgetOwnerSharingRule

Sharing rules are available for the object.

BudgetShare

Sharing is available for the object.

BudgetAllocation

Represents a subsection of a Budget that shows where allocated resources are being applied. This object is available in API version 53.0 and later.



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

Supported Calls

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

Special Access Rules

This object is available only if the Grants Management or Grantmaking license is enabled, Grants Management or Grantmaking is enabled, and the Manage Budgets system permission is assigned to users.

Fields

Field	Details
Amount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The total amount of allocated funds.
BudgetCategoryId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The budget category value that's associated with the grants allocation. This field is a relationship field. Relationship Name BudgetCategoryValue Relationship Type Lookup Refers To BudgetCategoryValue
BudgetId	Type reference Properties Create, Filter, Group, Sort Description The budget that this allocation is related to. This field is a relationship field. Relationship Name Budget

Field	Details
	Relationship Type Master-Detail Refers To Budget
FundingDisbursementId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The funding disbursement associated with the budget allocation. This field is available from API version 58.0 and later. This field is a relationship field. Relationship Name FundingDisbursement Relationship Type Lookup Refers To FundingDisbursement
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed this record.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description A descriptive name for the allocation.

Field	Details
Quantity	Type double Properties Create, Filter, Nillable, Sort, Update Description The total quantity amount allocated for non-currency projects.
Status	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The status of the budget allocation. Possible values are: • Allocated • Committed • Finalized

Associated Objects

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

BudgetAllocationFeed

Feed tracking is available for the object.

BudgetAllocationHistory

History is available for tracked fields of the object.

BudgetCategory

Represents the purpose of the budget line item. This object is available in API version 57.0 and later.



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

Supported Calls

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

Special Access Rules

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Budgets system permission is assigned to users.

Fields

Field	Details
BudgetId	Type reference Properties Create, Filter, Group, Sort Description The parent budget that's associated with the budget category. This field is a relationship field. Relationship Name Budget Relationship Type Master-Detail Refers To Budget
Description	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The description of the budget category.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed this record.

Field	Details
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the budget category.
Reason	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The reason why an item is being included in the budget.
SequenceNumber	Type double Properties Create, Filter, Nillable, Sort, Update Description The number assigned to a budget category that's used to edit or show a category.

Associated Objects

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

BudgetCategoryFeed

Feed tracking is available for the object.

BudgetCategoryHistory

History is available for tracked fields of the object.

BudgetCategoryValue

Captures budget values for category and time period. This object is available in API version 57.0 and later.



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

Supported Calls

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

Special Access Rules

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Budgets system permission is assigned to users.

Fields

Field	Details
ActualAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The actual amount of the budget that was used. This field is available from API version 59.0 and later.
ActualQuantity	Type double Properties Create, Filter, Nillable, Sort, Update Description The actual quantity of the budget that was used. This field is available from API version 59.0 and later.
Amount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The planned amount for the budget.
BudgetCategoryId	Type reference Properties Create, Filter, Group, Sort Description The ID that's associated with this budget category value. This field is a relationship field. Relationship Name BudgetCategory Relationship Type Master-Detail

Field	Details
	Refers To BudgetCategory
BudgetDivisionId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The budget period that's associated with the budget category value. This field is a relationship field. Relationship Name BudgetDivision Relationship Type Lookup Refers To BudgetPeriod
Comments	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The comments about how the budget was used. This field is available from API version 59.0 and later.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed this record.
Name	Type string

Field	Details
	Properties Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description The name of this budget category value.
Quantity	Type double
	Properties Create, Filter, Nillable, Sort, Update
	Description The planned quantity for the budget. Use when establishing budgets for non-currency projects.
VarianceAmount	Type currency
	Properties Filter, Nillable, Sort
	Description The amount over or under the planned budget that was used. This field is available from API version 59.0 and later. This field is a calculated field.
VarianceQuantity	Type double
	Properties Filter, Nillable, Sort
	Description The quantity over or under the planned budget that was used. This field is available from API version 59.0 and later. This field is a calculated field.

Associated Objects

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

BudgetCategoryValueFeed

Feed tracking is available for the object.

BudgetCategoryValueHistory

History is available for tracked fields of the object.

BudgetParticipant

Represents information about a user or group of participants who have access to a budget. This object is available in API version 59.0 and later.

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

Supported Calls

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

Special Access Rules

 **Example:** This object is accessible only when the Grantmaking license is on, Grantmaking is active, Compliant Data Sharing is on, and users have the Managed Funding Awards system permission.

Fields

Field	Details
BudgetId	Type reference Properties Create, Filter, Group, Sort Description The budget associated with the budget participant. This field is a relationship field. Relationship Name Budget Relationship Type Master-Detail Refers To Budget
Comments	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The comments about why the participant has access to the budget.
IsParticipantActive	Type boolean

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the budget participant is currently active (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed this record.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description The name of the budget participant.
ParticipantId	Type reference Properties Create, Filter, Group, Sort Description The participant associated with the budget. This field is a polymorphic relationship field. Relationship Name Participant Relationship Type Lookup Refers To Group, User

Field	Details
ParticipantRoleId	Type reference Properties Create, Filter, Group, Sort, Update Description The participant role associated with the budget participant. This field is a relationship field. Relationship Name ParticipantRole Relationship Type Lookup Refers To ParticipantRole

Associated Objects

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

BudgetParticipantFeed

Feed tracking is available for the object.

BudgetParticipantHistory

History is available for tracked fields of the object.

BudgetPeriod

Defines a distinct time interval in which the estimate applies. This object is available in API version 57.0 and later.



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

Supported Calls

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

Special Access Rules

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Budgets system permission is assigned to users.

Fields

Field	Details
BudgetId	Type reference Properties Create, Filter, Group, Sort Description The parent budget that's associated with the budget period. This field is a relationship field. Relationship Name Budget Relationship Type Master-Detail Refers To Budget
IsSubmitted	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the budget has been submitted. This field is available from API version 59.0 and later. The default value is <code>false</code>.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed this record.
Name	Type string

Field	Details
	Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the budget period.
PeriodEndDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date when the budget period ends.
PeriodStartDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The start date of the budget period.
SequenceNumber	Type double Properties Create, Filter, Nillable, Sort, Update Description The order in which the budget period is shown.

Associated Objects

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

BudgetPeriodFeed

Feed tracking is available for the object.

BudgetPeriodHistory

History is available for tracked fields of the object.

FundingAward

Represents an award given to an individual or organization to facilitate a goal related to the funder's mission. This object is available in API version 57.0 and later.

Supported Calls

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

Special Access Rules

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Funding Awards system permission is assigned to users.

Fields

Field	Details
Amount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The total award amount.
ApplicationFormId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The application form associated with the funding award. This field is a relationship field. This field is available from API version 66.0 and later. Relationship Name ApplicationForm Refers To ApplicationForm
AwardNumber	Type string Properties Autonumber, Defaulted on create, Filter, Sort Description The unique identifier of the funding award in the customer's org.
AwardeeId	Type reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update Description The entity related to the funding award. The account can be an organization (business account) or individual (person account) that receives the funding. This field is a relationship field. Relationship Name Awardee Relationship Type Lookup Refers To Account
BudgetId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The budget that's used to track the use of the award funding. This field is a relationship field. Relationship Name Budget Relationship Type Lookup Refers To Budget
ContactId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The individual receiving the funding award. This field is a relationship field. Relationship Name Contact Relationship Type Lookup Refers To Contact

Field	Details
ContractId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The contract associated with the funding award. This field is available from API version 59.0 and later. This field is a relationship field. Relationship Name Contract Relationship Type Lookup Refers To Contract
DecisionDate	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The date and time of the decision about the funding award.
EndDate	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The date and time when the contract related to the award ends.
FundingOpportunityId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The funding opportunity that's associated with the award. This field is a relationship field. Relationship Name FundingOpportunity Relationship Type Lookup

Field	Details
	Refers To FundingOpportunity
IndividualApplicationId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The individual application that's related to the award. This field is a relationship field. Relationship Name IndividualApplication Relationship Type Lookup Refers To IndividualApplication
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed this record.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the funding award.
OwnerId	Type reference

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update Description ID of the owner who owns the record. This field is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
ParentFundingAwardId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The parent funding award for this funding award. This field is a relationship field. Relationship Name ParentFundingAward Relationship Type Lookup Refers To FundingAward
ProgramId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The program associated with the funding award. This field is available from API version 58.0 and later. This field is a relationship field. Relationship Name Program Relationship Type Lookup Refers To Program

Field	Details
StartDate	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The date and time when the contract related to the award begins.
Status	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the current status of the award. Possible values are: • Active • Cancelled • Completed

Associated Objects

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

FundingAwardFeed

Feed tracking is available for the object.

FundingAwardHistory

History is available for tracked fields of the object.

FundingAwardOwnerSharingRule

Sharing rules are available for the object.

FundingAwardShare

Sharing is available for the object.

FundingAwardAmendment

Represents a modification to the scope or finances of a previously approved award. This object is available in API version 57.0 and later.



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

Supported Calls

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

Special Access Rules

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Funding Awards system permission is assigned to users.

Fields

Field	Details
AdjustedAwardAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The actual amount that's approved for adjustment in the funding award amount.
AdjustedEndDate	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The actual date of adjustment to the end date of the funding award.
ApprovalStatus	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the approval status of the requested adjustment. Possible values are: • Approved • In Review • New • Rejected
Comments	Type textarea Properties Create, Nillable, Update Description The comment about the approval or rejection of the adjustment request.

Field	Details
ContractId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The amended contract related to this funding award amendment. This field is available from API version 59.0 and later. This field is a relationship field. Relationship Name Contract Relationship Type Lookup Refers To Contract
FundingAwardId	Type reference Properties Create, Filter, Group, Sort Description The funding award that's associated with the contract that's adjusted. This field is a relationship field. Relationship Name FundingAward Relationship Type Master-Detail Refers To FundingAward
IsSubmitted	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the amendment to the funding award has been submitted (<code>true</code>) or not (<code>false</code>). This field is available from API version 58.0 and later. The default value is <code>false</code>.

Field	Details
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed this record.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description The name of amendment for the funding award.
ProposedAwardAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The amount of adjustment requested in the award amount.
ProposedEndDate	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The requested change to the End Date of the funding award.
Reason	Type textarea Properties Create, Nillable, Update Description The reason for the adjustment requested in the contract.

Field	Details
Status	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the status of the adjustment request. Possible values are: • Approved • Draft • Rejected • Submitted
Type	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the type of adjustment. Possible values are: • Administrative • Amount • Scope • Timeline

Associated Objects

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

[FundingAwardAmendmentFeed](#)

Feed tracking is available for the object.

[FundingAwardAmendmentHistory](#)

History is available for tracked fields of the object.

FundingAwardParticipant

Represents information about a user or group of participants who have access to a funding award. This object is available in API version 59.0 and later.



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

Supported Calls

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

Special Access Rules

This object is accessible only when the Grantmaking license is on, Grantmaking is active, Compliant Data Sharing is on, and users have the Managed Funding Awards system permission.

Fields

Field	Details
Comments	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The comments about why the participant has access to the funding award.
FundingAwardId	Type reference Properties Create, Filter, Group, Sort Description The funding award associated with the funding award participant. This field is a relationship field. Relationship Name FundingAward Relationship Type Master-Detail Refers To FundingAward
IsParticipantActive	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the funding award participant is currently active (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.

Field	Details
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed this record.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description The name of the funding award participant.
ParticipantId	Type reference Properties Create, Filter, Group, Sort Description The participant associated with the funding award. This field is a polymorphic relationship field. Relationship Name Participant Relationship Type Lookup Refers To Group, User
ParticipantRoleId	Type reference Properties Create, Filter, Group, Sort, Update Description The participant role associated with the funding award participant.

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

Associated Objects

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

[FundingAwardParticipantFeed](#)

Feed tracking is available for the object.

[FundingAwardParticipantHistory](#)

History is available for tracked fields of the object.

FundingAwardRequirement

Represents a deliverable or milestone for a funding award or funding disbursement. This object is available in API version 57.0 and later.



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

Supported Calls

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

Special Access Rules

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Funding Awards system permission is assigned to users.

Fields

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

Field	Details
	Description The action plan template that's related to the funding award requirement and that's used for funding requirement forms. This field is a relationship field. This field is available from API version 64.0 and later. Relationship Name ActionPlanTemplate Refers To ActionPlanTemplate
ApprovalStatus	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the approval status the information that's submitted against the requirements. Possible values are: • Approved • In Review • New • Rejected
AssignedContactId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The contact who is responsible for submitting the requirement. This field is a relationship field. Relationship Name AssignedContact Relationship Type Lookup Refers To Contact
AssignedUserId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The user who submits the funding requirement. This field is a relationship field. Relationship Name AssignedUser Relationship Type Lookup Refers To User
Description	Type textarea Properties Create, Nillable, Update Description The description of the funding requirement.
DueDate	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The last date and time of submitting the requirement.
FundingAwardId	Type reference Properties Create, Filter, Group, Sort Description Funding award that's associated with the funding requirement. This field is a relationship field. Relationship Name FundingAward Relationship Type Master-Detail Refers To FundingAward
FundingDisbursementId	Type reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update Description The funding disbursement that's associated with the requirement. The funds are disbursed only after the requirements are fulfilled. This field is a relationship field. Relationship Name FundingDisbursement Relationship Type Lookup Refers To FundingDisbursement
IsSubmitted	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the requirement for the funding award has been submitted (<code>true</code>) or not (<code>false</code>). This field is available from API version 58.0 and later. The default value is <code>false</code>.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.
Name	Type string

Field	Details
	Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the funding requirement.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description ID of the owner of this object. This field is a polymorphic relationship field. Relationship Name Owner Refers To Group, User
Status	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the status of the funding requirement. Possible values are: • Approved • Delayed • In Progress • Open • Rejected • Submitted
SubmittedDate	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The actual date and time when the requirement was submitted.
Type	Type picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Specifies the type of funding requirement. Possible values are: • Combined Report • Contract • Financial Report • Narrative Report

Associated Objects

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

FundingAwardRequirementFeed

Feed tracking is available for the object.

FundingAwardRequirementHistory

History is available for tracked fields of the object.

FundingAwardRqmtSectionOwnerSharingRule

Sharing rules are available for the object.

FundingAwardRqmtSection

Represents a part of a funding award requirement to be completed or reviewed. This object is available in API version 62.0 and later.



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

Supported Calls

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

Special Access Rules

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Funding Awards system permission is assigned to users.

Fields

Field	Details
ApplicationStageDefinitionId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The application stage definition associated with the funding award requirement section. This field is a relationship field. Relationship Name ApplicationStageDefinition Relationship Type Lookup Refers To ApplicationStageDefinition
AssignedUserId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The user assigned to complete the funding award requirement section. This field is a relationship field. Relationship Name AssignedUser Relationship Type Lookup Refers To User
Description	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The description of the funding award requirement section.
DisplayOrder	Type int Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The order in which the funding award requirement section shows on the form.
DueDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date when the funding award requirement section is due.
EndDateTime	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The date and time when the funding award requirement section ends.
FundingAwardRequirementId	Type reference Properties Create, Filter, Group, Sort Description The parent funding award requirement associated with the funding award requirement section. This field is a relationship field. Relationship Name FundingAwardRequirement Relationship Type Master-detail Refers To FundingAwardRequirement (the master object)
IsAssignedToMe	Type boolean Properties Defaulted on create, Filter, Group, Sort Description Indicates whether the requirement section is assigned to the logged in user (true) or not (false). This field can be used to filter the sections assigned to the user. The default value is <code>false</code> . This field is a calculated field.

Field	Details
IsRequired	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the funding award requirement section is required (true) or not (false). The default value is <code>false</code>.
IsSubmitted	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the funding award requirement section has been submitted (true) or not (false). The default value is <code>false</code>.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate is not null, the user accessed this record or list view indirectly.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the funding award requirement section

Field	Details
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description ID of the owner of this object. This field is a polymorphic relationship field. Relationship Name Owner Refers To Group, User
StartDateTime	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The date and time when the funding award requirement section starts.
Status	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the status of the funding award requirement section. Possible values are: • Canceled • Completed • In Progress • Not Started

Associated Objects

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

[FundingAwardRqmtSectionHistory](#)

History is available for tracked fields of the object.

[FundingAwardRequirementFeed](#)

Feed tracking is available for the object.

FundingAwardRqmtSectionOwnerSharingRule

Sharing rules are available for the object.

FundingAwardRqmtSectionShare

Sharing is available for the object.

FundingDisbursement

Represents a payment that has been made or scheduled to be made to a funding recipient. This object is available in API version 57.0 and later.

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

Supported Calls

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

Special Access Rules

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Funding Awards system permission is assigned to users.

Fields

Field	Details
Amount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The total amount that's disbursed to the awardee.
DisbursementDate	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The actual date and time of funds disbursement.
FundingAwardId	Type reference Properties Create, Filter, Group, Sort

Field	Details
	Description The funding award that's associated with the funding disbursement. This field is a relationship field. Relationship Name FundingAward Relationship Type Master-Detail Refers To FundingAward
IsApproved	Type boolean Properties Defaulted on create, Filter, Group, Sort Description Indicates whether the funding disbursement is approved (true) or not (false). The default value is <code>false</code>.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed this record.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The autogenerated name of the funding disbursement.
OwnerId	Type reference

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The owner of the record. This field is a polymorphic relationship field. This field is available from API version 63.0 and later. Relationship Name Owner Refers To Group, User
PaymentMethodType	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the payment method for funds disbursement. Possible values are: • Cash • Check • EFT • Wire
PaymentNumber	Type string Properties Autonumber, Defaulted on create, Filter, Sort Description The unique identifier of the payment related to the funds disbursement.
ScheduledDate	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The scheduled date and time to disburse the funds.
Status	Type picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Specifies the approval status of the funds disbursement. Possible values are: • Approved • Cancelled • Paid • Pending Approval • Processing • Returned • Scheduled

Associated Objects

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

FundingDisbursementShare

Sharing is available for the object.

FundingDisbursementOwnerSharingRule

Sharing rules are available for the object.

FundingDisbursementFeed

Feed tracking is available for the object.

FundingDisbursementHistory

History is available for tracked fields of the object.

FundingOpportunity

The pool of money available for distribution for a specific purpose. This object is available in API version 57.0 and later.

Supported Calls

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

Special Access Rules

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Funding Awards system permission is assigned to users.

Fields

Field	Details
ActionPlanTemplateId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The action plan template that represents the application sections for this funding opportunity. Relationship Name ActionPlanTemplate Refers To ActionPlanTemplate
ApplicationInstructions	Type textarea Properties Create, Nillable, Update Description The instructions on how to apply for the funding opportunity.
ApplicationTimelineId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The application timeline associated with the opportunity that describes the milestones in the application process. This field is a relationship field. Relationship Name ApplicationTimeline Relationship Type Lookup Refers To ApplicationTimeline
BudgetTemplateId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The budget that's used as a template by the applicants when they apply for the funding opportunity. This field is a relationship field. Relationship Name BudgetTemplate Relationship Type Lookup Refers To Budget
Description	Type textarea Properties Create, Nillable, Update Description The description about the opportunity in terms of the minimum award requirements and expected outcome.
EndDate	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The date and time when the acceptance of funding opportunity applications ended.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed this record.

Field	Details
MaximumFundingAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The maximum fund amount that's awarded.
MinimumFundingAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The minimum fund amount that's awarded.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the funding opportunity.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description ID of the owner who owns the record.s This field is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
ParentFundingOpportunityId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The associated parent funding opportunity.

Field	Details
	This field is available from API version 59.0 and later. This field is a relationship field. Relationship Name ParentFundingOpportunity Relationship Type Lookup Refers To FundingOpportunity
ProgramId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The program associated with the funding opportunity. This field is available from API version 58.0 and later. This field is a relationship field. Relationship Name Program Relationship Type Lookup Refers To Program
StartDate	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The date and time when the acceptance of funding opportunity applications started.
Status	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the status of the funding opportunity. Possible values are: • Active • Cancelled

Field	Details
	- Completed - Planned

Associated Objects

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

FundingOpportunityFeed

Feed tracking is available for the object.

FundingOpportunityHistory

History is available for tracked fields of the object.

FundingOpportunityOwnerSharingRule

Sharing rules are available for the object.

FundingOpportunityShare

Sharing is available for the object.

FundingOppParticipant

Represents information about a user or group of participants who have access to a funding opportunity. This object is available in API version 60.0 and later.



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

Supported Calls

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

Special Access Rules

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Funding Awards system permission is assigned to users.

Fields

Field	Details
Comments	Type string Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The comments about why the participant has access to the funding opportunity.
FundingOpportunityId	Type reference Properties Create, Filter, Group, Sort Description The funding opportunity associated with the funding opportunity participant. This field is a relationship field. Relationship Name FundingOpportunity Relationship Type Master-Detail Refers To FundingOpportunity
IsParticipantActive	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the funding opportunity participant is currently active (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code> .
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed this record.

Field	Details
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description The name of the funding opportunity participant.
ParticipantId	Type reference Properties Create, Filter, Group, Sort Description The participant associated with the funding opportunity. This field is a polymorphic relationship field. Relationship Name Participant Relationship Type Lookup Refers To Group, User
ParticipantRoleId	Type reference Properties Create, Filter, Group, Sort, Update Description The participant role associated with the funding opportunity participant. This field is a relationship field. Relationship Name ParticipantRole Relationship Type Lookup Refers To ParticipantRole

Associated Objects

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

FundingOppParticipantFeed

Feed tracking is available for the object.

FundingOppParticipantHistory

History is available for tracked fields of the object.

IndicatorAssignment

Represents the assignment of an indicator definition that's used to measure the performance of an outcome or a related activity. This object is available in API version 59.0 and later.



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

Supported Calls

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

Special Access Rules

This object is available in products:

- That include the Outcome Management and Grantmaking licenses.
- Where Outcome Management and Grantmaking are enabled.
- The Manage Applications, Manage Funding Awards, Manage Outcomes, and Use Grantmaking system permissions are assigned to users.

Fields

Field	Details
FundingAwardId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The funding award that the indicator assignment measures. This field is a relationship field. Relationship Name FundingAward Relationship Type Lookup Refers To FundingAward

Field	Details
FundingOpportunityId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The funding opportunity that the indicator assignment measures. This field is a relationship field. Relationship Name FundingOpportunity Relationship Type Lookup Refers To FundingOpportunity
IndicatorAssignmentType	Type picklist Properties Create, Filter, Group, Sort, Update Description Specifies the object that the indicator assignment measures. Possible values are: • Outcome • Program
IndicatorDefinitionId	Type reference Properties Create, Filter, Group, Sort Description The indicator definition that's associated with the indicator assignment. This field is a relationship field. Relationship Name IndicatorDefinition Relationship Type Master-detail Refers To IndicatorDefinition (the master object)
IndividualApplicationId	Type reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update Description The individual application that the indicator assignment measures. This field is a relationship field. Relationship Name IndividualApplication Relationship Type Lookup Refers To IndividualApplication
IntendedDirection	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the intended direction of change in the behavior, knowledge, skills, status, or level of functioning that's detailed in the parent indicator definition. Possible values are: • Decrease • Increase • Maintain
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate is not null, the user accessed this record or list view indirectly.

Field	Details
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the indicator assignment.
OutcomeId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The outcome that the indicator assignment measures. This field is a relationship field. Relationship Name Outcome Relationship Type Lookup Refers To Outcome
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The owner of this indicator assignment. This field is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
ProgramId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The program that the indicator assignment measures.

Field	Details
	This field is a relationship field. Relationship Name Program Relationship Type Lookup Refers To Program
Status	Type picklist Properties Create, Filter, Group, Sort, Update Description Specifies the status of the indicator assignment. Possible values are: • Active • Canceled • Completed • Planned

Associated Objects

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

IndicatorAssignmentFeed

Feed tracking is available for the object.

IndicatorAssignmentHistory

History is available for tracked fields of the object.

IndicatorAssignmentOwnerSharingRule

Sharing rules are available for the object.

IndicatorAssignmentShare

Sharing is available for the object.

IndicatorPerformancePeriod

Represents information about a specified time period including the frequency at which indicator results should be calculated and the baseline value of the indicator. This object is available in API version 59.0 and later.



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

Supported Calls

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

Special Access Rules

This object is available in products:

- That include the Outcome Management and Grantmaking licenses.
- Where Outcome Management and Grantmaking are enabled.
- The Manage Applications, Manage Funding Awards, Manage Outcomes, and Use Grantmaking system permissions are assigned to users.

Fields

Field	Details
BaselineDescription	Type textarea Properties Create, Filter, Nillable, Sort, Update Description The description of the baseline value.
BaselineValue	Type double Properties Create, Filter, Nillable, Sort, Update Description The value of the indicator assignment at the beginning of the indicator performance period.
Description	Type textarea Properties Create, Filter, Nillable, Sort, Update Description The description of the indicator performance period.
FundingAwardRequirementId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The funding award requirement that's associated with the indicator performance period.

Field	Details
	This field is a relationship field. Relationship Name FundingAwardRequirement Relationship Type Lookup Refers To FundingAwardRequirement
IndicatorAssignmentId	Type reference Properties Create, Filter, Group, Sort Description The indicator assignment that is associated with the indicator performance period. This field is a relationship field. Relationship Name IndicatorAssignment Relationship Type Master-detail Refers To IndicatorAssignment (the master object)
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastResultMeasurementDate	Type date Properties Filter, Group, Nillable, Sort Description The date when the last result value was measured. This field is a calculated field.
LastResultValue	Type double

Field	Details
	Properties Filter, Nillable, Sort Description The result value from the most recently measured indicator result. This field is a calculated field.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate is not null, the user accessed this record or list view indirectly.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the indicator performance period.
TargetProgress	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the progress of the target within the time period. Possible values are: • At Risk • Complete • Not Met • Not Started • On Track
TargetValue	Type double Properties Create, Filter, Nillable, Sort, Update Description The target value of the indicator assignment within the time period.

Field	Details
TimePeriodId	Type reference Properties Create, Filter, Group, Sort, Update Description The time period that is associated with the indicator performance period. This field is a relationship field. Relationship Name TimePeriod Relationship Type Lookup Refers To TimePeriod

Associated Objects

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

IndicatorPerformancePeriodFeed

Feed tracking is available for the object.

IndicatorPerformancePeriodHistory

History is available for tracked fields of the object.

IndividualApplication

Represents an application form submitted by an individual or organization. This object is available in API version 50.0 and later.

Supported Calls

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

Fields

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

Field	Details
	Description The ID of the applicant's account. This is a relationship field. Relationship Name Account Relationship Type Lookup Refers To Account
ApplicationCaseId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The ID of a case that relates to this application. This is a relationship field. Relationship Name ApplicationCase Relationship Type Lookup Refers To Case
ApplicationChangeOverview	Type textarea Properties Create, Nillable, Update Description The Einstein-generated historical overview of the changes between application versions. Available in API versions 62.0 and later. Einstein Generative AI for Public Sector Solutions must be enabled.
ApplicationName	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description Descriptive name for the application. This field is available if you enabled Public Sector Solutions or Grantmaking in Setup. Available from API version 57.0 and later.

Field	Details
ApplicationOverview	Type textarea Properties Create, Nillable, Update Description The Einstein-generated historical overview of application stages, data changes, and processing actions. Available in API versions 62.0 and later. Einstein Generative AI for Public Sector Solutions must be enabled.
ApplicationReferenceNumber	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The custom reference number assigned to the application. This field is available if you enabled Health Cloud, Public Sector Solutions, or Grantmaking in Setup.
ApplicationType	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The type of the application. Possible values are: • <code>Change Of Circumstance</code>—Available in API versions 62.0 and later with Public Sector Solutions. • <code>ChangeOfCircumstance</code>—Available in API versions 60.0 and 61.0 with Public Sector Solutions. • <code>New</code> • <code>Recertification</code>—Available in API version 60.0 and later with Public Sector Solutions. • <code>Renewal</code>
AppliedDate	Type dateTime Properties Create, Filter, Sort, Update Description The date on which the application was received from the applicant.

Field	Details
ApprovedDate	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The date on which the application was approved.
BudgetId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The budget associated with the individual application. This field is available if you enabled Public Sector Solutions or Grantmaking in Setup. Available from API version 57.0 and later. This field is a relationship field. Relationship Name Budget Relationship Type Lookup Refers To Budget
Category	Type picklist Properties Create, Filter, Group, Sort, Update Description The service category of the application. Possible values are: • License • Permit • Grant Application • Letter of Intent
ContactId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The contact associated with the individual application. This field is a relationship field. Relationship Name Contact Relationship Type Lookup Refers To Contact
Description	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description Text description provided by the applicant.
FundingOpportunityId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The funding opportunity associated with the individual application. This field is available if you enabled Public Sector Solutions or Grantmaking in Setup. Available in API version 57.0 and later. This field is a relationship field. Relationship Name FundingOpportunity Relationship Type Lookup Refers To FundingOpportunity
FundingRequestPurpose	Type textarea Properties Create, Nillable, Update Description Description of what the individual application funds are used for. This field is available if you enabled Public Sector Solutions or Grantmaking in Setup. Available in API version 57.0 and later.

Field	Details
InternalStatus	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Status of the individual application in Salesforce CRM. Available in API version 57.0 and later. Possible values are: • Invited • In Progress • Submitted • Application Accepted • Revision Requested • In Review • Approved • Denied
IsOwnerEditable	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Whether the owner ID of this record can be changed. The default value is 'false'.
IsSubmitted	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the individual application has been submitted. This field is available if you enabled Public Sector Solutions or Grantmaking in Setup. Available in API version 58.0 and later.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when a user most recently viewed a record related to this record.

Field	Details
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when a user most recently viewed this record. If this value is null, this record might only have been referenced (LastReferencedDate) and not viewed.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description The auto-generated unique ID for this application.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The ID of the user that owns this record. This is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
RecordTypeId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The record associated to the application. This is a relationship field. Relationship Name RecordType Relationship Type Lookup

Field	Details
	Refers To RecordType
RequestedAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description Amount requested in the individual application. This field is available if you enabled Public Sector Solutions or Grantmaking in Setup. Available in API version 57.0 and later.
RequirementsCompleteDate	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The date when the applicant fulfilled all the requirements for approval.
SavedApplicationRefId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description Reference Id of the saved application. This is a relationship field. Relationship Name SavedApplicationRef Relationship Type Lookup Refers To PreliminaryApplicationRef
Status	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The submission and approval status of the application. Possible values are: Invited

Field	Details
	• In Progress • Submitted • Application Accepted • Revision Requested • In Review • Approved • Denied
WasReturned	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Whether a submitted application was sent back to the applicant due to errors. The default value is 'false'.

Associated Objects

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

IndividualApplicationChangeEvent (API Version 55.0)

Change events are available for the object.

IndividualApplicationFeed

Feed tracking is available for the object.

IndividualApplicationHistory

History is available for tracked fields of the object.

IndividualApplicationOwnerSharingRule

Sharing rules are available for the object.

IndividualApplicationShare

Sharing is available for the object.

IndividualApplicationTask

Represents a task related to an application. This object is available in Grantmaking API version 61.0 and later.

Supported Calls

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

Special Access Rules

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Funding Awards system permission is assigned to users.

Fields

Field	Details
ApplicationStageDefinitionId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The application stage definition associated with the individual application task. This field is a relationship field. Relationship Name ApplicationStageDefinition Relationship Type Lookup Refers To ApplicationStageDefinition
Description	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description Describes the details of the task to be completed.
DueDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date when the individual application task must be completed.
DueDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date when the individual application task must be completed.

Field	Details
EndTime	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The date and time when the individual application task ends.
IndividualApplicationId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The individual application associated with the individual application task. This field is a relationship field. Relationship Name IndividualApplication Relationship Type Lookup Refers To IndividualApplication
IsRequired	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the individual application task is required (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.
IsSubmitted	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the individual application task has been submitted. The default value is <code>false</code>.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort

Field	Details
	Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate is not null, the user accessed this record or list view indirectly.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the individual application task.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description ID of the user who owns the record. This field is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
PreliminaryApplicationRefId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The parent funding award for this funding award. This field is a relationship field.

Field	Details
	Relationship Name PreliminaryApplicationRef Relationship Type Lookup Refers To PreliminaryApplicationRef
SavedApplicationUrl	Type url Properties Create, Filter, Nillable, Sort, Update Description The URL of a saved application that's associated with the individual application task.
SequenceNumber	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The sequence in which the individual application task must be performed.
StartDateTime	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The date and time when the individual application task starts.
Status	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the status of the individual application task. Possible values are: - Cancelled - Completed - In Progress - Not Started

Field	Details
Type	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the type of the individual application task. Possible values are: • Grantmaking

Associated Objects

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

IndividualApplicationTaskFeed

Feed tracking is available for the object.

IndividualApplicationTaskHistory

History is available for tracked fields of the object.

IndividualApplicationTaskShare

Sharing is available for the object.

IndvApplicationTaskParticipant

Represents information about a user or group of participants who have read or write access to an individual application task. This object is available in API version 61.0 and later.

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

Supported Calls

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

Special Access Rules

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Applications system permission is assigned to users.

Fields

Field	Details
Comments	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The reasons why a participant is involved in an individual application task.
IndividualApplicationTaskId	Type reference Properties Create, Filter, Group, Sort Description The individual application task associated with the individual application task participant. This field is a relationship field. Relationship Name IndividualApplicationTask Relationship Type Master-Detail Refers To IndividualApplicationTask (the master object)
IsParticipantActive	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates if the participant is currently active. The default value is <code>false</code>.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	Type dateTime

Field	Details
	Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view indirectly.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description The name of the individual application task participant.
ParticipantId	Type reference Properties Create, Filter, Group, Sort Description The participant associated with the individual application task. This field is a polymorphic relationship field. Relationship Name Participant Relationship Type Lookup Refers To Group, User
ParticipantRoleId	Type reference Properties Create, Filter, Group, Sort, Update Description The participant role associated with the individual application task participant. This field is a relationship field. Relationship Name ParticipantRole Relationship Type Lookup Refers To ParticipantRole

Associated Objects

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

IndvApplicationTaskParticipantFeed

Feed tracking is available for the object.

IndvApplicationTaskParticipantHistory

History is available for tracked fields of the object.

IndividualAppInParticipant

Represents information about a user or group of participants who have access to a individual application. This object is available in API version 59.0 and later.



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

Supported Calls

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

Special Access Rules

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Funding Awards system permission is assigned to users.

Fields

Field	Details
Comments	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The comments about why the participant has access to the individual application.
IndividualApplicationId	Type reference Properties Create, Filter, Group, Sort Description The individual application associated with the individual application participant. This field is a relationship field.

Field	Details
	Relationship Name IndividualApplication Relationship Type Master-Detail Refers To IndividualApplication
IsParticipantActive	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the individual application participant is currently active (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed this record.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description The name of the individual application participant.
ParticipantId	Type reference Properties Create, Filter, Group, Sort

Field	Details
	Description The participant associated with the individual application. This field is a polymorphic relationship field. Relationship Name Participant Relationship Type Lookup Refers To Group, User
ParticipantRoleId	Type reference Properties Create, Filter, Group, Sort, Update Description The participant role associated with the individual application participant. This field is a relationship field. Relationship Name ParticipantRole Relationship Type Lookup Refers To ParticipantRole

Associated Objects

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

IndividualApplnParticipantFeed

Feed tracking is available for the object.

IndividualApplnParticipantHistory

History is available for tracked fields of the object.

OutcomeActivity

Represents a junction between an outcome and the object that's related to the activity undertaken by an organization to achieve that outcome. This object is available in API version 59.0 and later.



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

Supported Calls

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

Special Access Rules

This object is available in products:

- That include the Outcome Management and Grantmaking licenses.
- Where Outcome Management and Grantmaking are enabled.
- The Manage Applications, Manage Funding Awards, Manage Outcomes, and Use Grantmaking system permissions are assigned to users.

Fields

Field	Details
BenefitId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The benefit that's associated with the outcome. This field is a relationship field. Relationship Name Benefit Relationship Type Lookup Refers To Benefit
FundingAwardId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The funding award that's associated with the outcome. This field is a relationship field. Relationship Name FundingAward Relationship Type Lookup

Field	Details
	Refers To FundingAward
FundingOpportunityId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The funding opportunity that's associated with the outcome. This field is a relationship field. Relationship Name FundingOpportunity Relationship Type Lookup Refers To FundingOpportunity
GoalDefinitionId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The goal definition that's associated with the outcome. This field is available from API version 60.0 and later. This field is a relationship field. Relationship Name GoalDefinition Relationship Type Lookup Refers To GoalDefinition
IndividualApplicationId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The individual application that's associated with the outcome. This field is a relationship field. Relationship Name IndividualApplication

Field	Details
	Relationship Type Lookup Refers To IndividualApplication
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate is not null, the user accessed this record or list view indirectly.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the outcome activity.
OutcomeActivityType	Type picklist Properties Create, Filter, Group, Sort, Update Description Specifies the type of activity that's associated with the outcome Possible values are: - Benefit - Goal Definition This value is available from API version 60.0 and later. - Program
OutcomeId	Type reference

Field	Details
	Properties Create, Filter, Group, Sort Description The outcome that's associated with the outcome. This field is a relationship field. Relationship Name Outcome Relationship Type Master-detail Refers To Outcome (the master object)
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The owner of the record. This field is a polymorphic relationship field. This field is available from API version 63.0 and later. Relationship Name Owner Refers To Group, User
ProgramId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The program that's associated with the outcome. This field is a relationship field. Relationship Name Program Relationship Type Lookup Refers To Program

Associated Objects

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

OutcomeActivityShare

Sharing is available for the object.

OutcomeActivityOwnerSharingRule

Sharing rules are available for the object.

OutcomeActivityFeed

Feed tracking is available for the object.

OutcomeActivityHistory

History is available for tracked fields of the object.

PreliminaryApplicationRef

Represents the saved applications and pre-screening forms. This object is available in API version 49.0 and later.

Supported Calls

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

Special Access Rules

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Application system permission is assigned to users.

Fields

Field	Details
ApplicantId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description ID of the applicant for the application. This field is a relationship field. Relationship Name Applicant Relationship Type Lookup Refers To Contact

Field	Details
ApplicationCategory	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The category of the application
ApplicationName	Type string Properties Create, Filter, Group, Sort, Update Description Name of the preliminary application.
ApplicationType	Type picklist Properties Create, Filter, Group, Restricted picklist, Sort, Update Description Type of application. Possible values are: • <code>BusinessLicenseApplication</code>—Business License Application • <code>BusinessPrescreening</code>—License Requirement Assessment • <code>IndividualApplication</code>—Individual Application
BusinessAccountNameId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description ID of the account related to the application. This field is a relationship field. Relationship Name BusinessAccountName Relationship Type Lookup Refers To Account
IsSubmitted	Type boolean

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the application was submitted. The default value is <code>false</code>.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed this record.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description Name of the preliminary application.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description ID of the owner who owns the record. This field is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User

Field	Details
SavedApplicationUrl	Type url Properties Create, Filter, Group, Sort, Update Description Relative path of the saved application.
SubmissionDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date when the application was submitted.

Associated Objects

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

[PreliminaryApplicationRefFeed](#)

Feed tracking is available for the object.

[PreliminaryApplicationRefHistory](#)

History is available for tracked fields of the object.

[PreliminaryApplicationRefOwnerSharingRule](#)

Sharing rules are available for the object.

[PreliminaryApplicationRefShare](#)

Sharing is available for the object.

Program

Represents information about the enrollment and disbursement of benefits in a program. This object is available in API version 57.0 and later.

Supported Calls

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

Fields

Field	Details
ActionPlanTemplateId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The action plan template that's associated with the program. This field is a relationship field. This field is available from API version 65.0 and later. Relationship Name ActionPlanTemplate Refers To ActionPlanTemplate
ActiveEnrolleeCount	Type double Properties Create, Filter, Nillable, Sort, Update Description The count of program enrollees with <code>IsActive</code> on ProgramEnrollment selected. Data Processing Engine calculates this field if you activate the Program Management Data Processing Engine Definition templates in Setup. You can schedule this calculation to run on a regular basis.
AdditionalContext	Type textarea Properties Create, Nillable, Update Description The additional context about the program.
CurrentMonthDisbCount	Type double Properties Create, Filter, Nillable, Sort, Update Description The count of benefits disbursed in the current month. Data Processing Engine calculates this field if you activate the Program Management Data Processing Engine Definition templates in Setup. You can schedule this calculation to run on a regular basis.

Field	Details
CurrentYearDisbCount	Type double Properties Create, Filter, Nillable, Sort, Update Description The count of benefits disbursed in the current year. Data Processing Engine calculates this field if you activate the Program Management Data Processing Engine Definition templates in Setup. You can schedule this calculation to run on a regular basis.
EndDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date when the program ends.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view. If this value is null, and <code>LastReferenceDate</code> is not null, the user accessed this record or list view.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the program.
OwnerId	Type reference

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The user who owns the object. This field is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
ParentProgramId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The associated parent program. This field is available from API version 59.0 and later. This field is a relationship field. Relationship Name ParentProgram Relationship Type Lookup Refers To Program
PreviousMonthDisbCount	Type double Properties Create, Filter, Nillable, Sort, Update Description The count of benefits disbursed in the previous month. Data Processing Engine calculates this field if you activate the Program Management Data Processing Engine Definition templates in Setup. You can schedule this calculation to run on a regular basis.
PreviousYearDisbCount	Type double Properties Create, Filter, Nillable, Sort, Update

Field	Details
	Description The count of benefits disbursed in the previous year. Data Processing Engine calculates this field if you activate the Program Management Data Processing Engine Definition templates in Setup. You can schedule this calculation to run on a regular basis.
StartDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date when the program begins.
Status	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The status of the program. Possible values are: • Active • Cancelled • Completed • Planned This field is accessible if you enabled Data Protection and Privacy in Setup.
Summary	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The summary of the program.
TotalEnrolleeCount	Type double Properties Create, Filter, Nillable, Sort, Update Description The total count of enrollees in the program. Data Processing Engine calculates this field if you activate the Program Management Data Processing Engine Definition templates in Setup. You can schedule this calculation to run on a regular basis.

Field	Details
UsageType	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the usage type of the program. Possible value is <code>ProgramManagement</code>.

Associated Objects

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

[ProgramChangeEvent](#)

Change events are available for the object.

[ProgramFeed](#)

Feed tracking is available for the object.

[ProgramHistory](#)

History is available for tracked fields of the object.

[ProgramOwnerSharingRule](#)

Sharing rules are available for the object.

[ProgramShare](#)

Sharing is available for the object.

Grantmaking Fields on Other Objects

Grantmaking includes fields that are available on other Salesforce objects. These fields are available only in orgs with Grantmaking enabled.

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions in Nonprofit Cloud for Grantmaking

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions in Public Sector Solutions

[ApplicationForm](#)

Represents an application form submitted by an individual or organization. This object is available in API version 66.0 and later.

[ApplicationFormEvaluation](#)

Represents the details of the evaluation performed for an application form. This object is available in Grantmaking API version 66.0 and later.

[ApplicationFormEvalSection](#)

Represents a section of an Application Form Evaluation. This object is available in API version 66.0 and later.

ApplicationForm

Represents an application form submitted by an individual or organization. This object is available in API version 66.0 and later.

Supported Calls

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

Special Access Rules

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and Track Applications is turned on.

Fields

Field	Details
ApplicationStatus	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the status of the application.
BudgetId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The budget that's associated with the application. This field is a relationship field. Relationship Name Budget Refers To Budget
CompletionDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date that the application was completed.

Field	Details
ContactId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The contact that's associated with the application. This field is a relationship field. Relationship Name Contact Refers To Contact
DueDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date when the application is due.
Purpose	Type textarea Properties Create, Nillable, Update Description The purpose of the funding that's requested in the application.
ReferenceRecordId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The opportunity that's associated with the application. This field is a polymorphic relationship field. Relationship Name ReferenceRecord Refers To Benefit, FundingOpportunity, Program
ReferralId	Type reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update Description The referral that's associated with the application. This field is a relationship field. Relationship Name Referral Refers To Referral
RequestedAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The amount of funding that's requested in the application.
Title	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The descriptive name of the application. The name includes the applicant and the program that the applicant is applying to.
UsageType	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the type of application. Possible values are: • EmployeeRecruitment—Talent Recruitment Management • Grantmaking • Other • Program • Volunteer

Associated Objects

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

ApplicationFormFeed

Feed tracking is available for the object.

ApplicationFormHistory

History is available for tracked fields of the object.

ApplicationFormOwnerSharingRule

Sharing rules are available for the object.

ApplicationFormShare

Sharing is available for the object.

ApplicationFormEvaluation

Represents the details of the evaluation performed for an application form. This object is available in Grantmaking API version 66.0 and later.

Supported Calls

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

Special Access Rules

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and Track Applications is turned on.

Fields

Field	Details
AssignedDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date when the application form evaluation was assigned to the evaluator.
DueDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date when the application form evaluation is due.

Field	Details
EndDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date when the application form evaluation was completed.
RelationReferenceRecordId	Type reference Properties Filter, Group, Nillable, Sort Description The ID of the record that's referenced in the application form relation object that's associated with this application form evaluation. This field is a polymorphic relationship field. Relationship Name RelationReferenceRecord Refers To Benefit, BenefitAssignment, Case, FundingOpportunity, JobPosition, Program, ProgramEnrollment, RecruitmentRequisition
StartDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date when the application form evaluation was started.
Status	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the status of the application form evaluation. Possible values are: • Eligible • Need more information • Not Eligible
Title	Type string

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The name of the application form evaluation.

Associated Objects

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

[ApplicationFormEvaluationFeed](#)

Feed tracking is available for the object.

[ApplicationFormEvaluationHistory](#)

History is available for tracked fields of the object.

[ApplicationFormEvaluationOwnerSharingRule](#)

Sharing rules are available for the object.

[ApplicationFormEvaluationShare](#)

Sharing is available for the object.

ApplicationFormEvalSection

Represents a section of an Application Form Evaluation. This object is available in API version 66.0 and later.

Supported Calls

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

Special Access Rules

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and Track Applications is turned on.

Fields

Field	Details
ApplicationFormEvaluationId	Type reference
	Properties Create, Filter, Group, Sort, Update
	Description The lookup to the related Application Form Evaluation. This field is a relationship field.

Field	Details
	Relationship Name ApplicationFormEvaluation Refers To ApplicationFormEvaluation
ApplicationFormId	Type reference Properties Filter, Group, Nillable, Sort Description The lookup to the related Application Form. This field is a relationship field. Relationship Name ApplicationForm Refers To ApplicationForm
ApplicationStageDefinitionId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The lookup to the related Application Stage Definition. This field is a relationship field. Relationship Name ApplicationStageDefinition Refers To ApplicationStageDefinition
CurrencyIsoCode	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Identifies the currency used for the Application Form Evaluation section. Possible values are: • USD—U.S. Dollar The default value is USD.

Field	Details
Description	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The short description of this section.
DisplayOrder	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the order in which to show this section in the list of all Application Form Evaluation sections.
DueDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date by which this section must be submitted.
EndDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date that the evaluator completed review of this section.
IsRequired	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Determines whether this evaluation section must be completed. The default value is <code>false</code>.
IsSubmitted	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	Description Determines whether the section was submitted by the evaluator for review. The default value is <code>false</code>.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate isn't null, the user accessed this record or list view.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the Application Form Evaluation Section.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description ID of the owner of this object. ID of the creator of this object. This field is a polymorphic relationship field. Relationship Name Owner Refers To Group, User
StartDate	Type date

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update Description The date that the evaluator started reviewing this section.
Status	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The evaluation review status of this section.

Associated Objects

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

[ApplicationFormEvaluationSectionFeed](#)

Feed tracking is available for the object.

[ApplicationFormEvaluationSectionHistory](#)

History is available for tracked fields of the object.

[ApplicationFormEvaluationSectionOwnerSharingRule](#)

Sharing rules are available for the object.

[ApplicationFormEvaluationSectionShare](#)

Sharing is available for the object.

Grantmaking Tooling API Object

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

For more information about Tooling API objects and to find a complete reference of all the supported objects, see [Introducing Tooling API](#).

[ApplicationRecordTypeConfig](#)

Represents the configuration that maps object record types to an application. This object is available in API version 57.0 and later.

ApplicationRecordTypeConfig

Represents the configuration that maps object record types to an application. This object is available in API version 57.0 and later.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions in Nonprofit Cloud for Grantmaking

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions in Public Sector Solutions

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

Supported SOAP API Calls

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

Supported REST API Methods

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

Special Access Rules

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Application system permission is assigned to users.

Fields

Field	Details
ApplicationUsageType	Type picklist Properties Create, Filter, Group, Restricted picklist, Sort, Update Description Count of application records used by Grantmaking. Possible values are: • BA—Benefit Assistance • CCM—Composable Case Management • EDU—Education Cloud • Grantmaking • HC—Health Cloud • ERM—Others • LPI—Public Sector Solutions
DeveloperName	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The unique name for ApplicationRecordTypeConfig. The unique name of the object in the API. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.

Field	Details
	In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization. Label is Record Type Name. This field is automatically generated, but you can supply your own value if you create the record using the API.  Note: When creating large sets of data, always specify a unique <code>DeveloperName</code> for each record. If no <code>DeveloperName</code> is specified, performance may slow while Salesforce generates one for each record.
Language	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The language of the ApplicationRecordTypeConfig. Possible values are: • The language of the account record type configuration. • <code>da</code>—Danish • <code>de</code>—German • <code>en_US</code>—English • <code>es</code>—Spanish • <code>es_MX</code>—Spanish (Mexico) • <code>fi</code>—Finnish • <code>fr</code>—French • <code>it</code>—Italian • <code>ja</code>—Japanese • <code>ko</code>—Korean • <code>nl_NL</code>—Dutch • <code>no</code>—Norwegian • <code>pt_BR</code>—Portuguese (Brazil) • <code>ru</code>—Russian • <code>sv</code>—Swedish • <code>th</code>—Thai • <code>zh_CN</code>—Chinese (Simplified) • <code>zh_TW</code>—Chinese (Traditional)
MasterLabel	Type string Properties Create, Filter, Group, Sort, Update

Field	Details
	Description Label for the ApplicationRecordTypeConfig. In the UI, this field is Application Record Type Configuration.
ObjectName	Type picklist Properties Create, Filter, Group, Restricted picklist, Sort, Update Description Objects used by Grantmaking. Possible values are: IndividualApplication—Individual Application
RecordTypeName	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of record type that was created for Individual Application.

Grantmaking 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.

Find a complete reference of existing metadata types, see [Metadata API Developer Guide](#).

IndustriesSettings

Represents the settings for Grantmaking

IndustriesSettings

Represents the settings for Grantmaking

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

In the package manifest, all organization settings metadata types are accessed using the Settings name.

File Suffix and Directory Location

IndustriesSettings are stored in a single file named `Industries.settings` in the `settings` directory.

Version

Industries settings for Grantmaking are available in API version 59.0 and later.

Special Access Rules

Unless noted otherwise, these settings are available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Application system permission is assigned to users.

Fields

Industries settings for Grantmaking are available in API version 59.0 and later.

Field Name	Field Type	Description
<code>enableCompliantDataSharingForBudget</code>	boolean	Indicates whether the Compliant Data Sharing feature is enabled for the Budget object. The default is <code>false</code> . Available only if the Grantmaking license is enabled and Grantmaking is enabled.
<code>enableCompliantDataSharingForIndividualApplication</code>	boolean	Indicates whether the Compliant Data Sharing feature is enabled for the Individual Application object. The default is <code>false</code> . Available only if the Grantmaking license is enabled and Grantmaking is enabled.
<code>enableCompliantDataSharingForFundingAward</code>	boolean	Indicates whether the Compliant Data Sharing feature is enabled for the Funding Award object. The default is <code>false</code> . Available only if the Grantmaking license is enabled and Grantmaking is enabled.
<code>enableGrantmaking</code>	boolean	Indicates whether the Grantmaking feature is enabled. The default is <code>false</code> . This option can't be disabled (<code>false</code>) once it's enabled (<code>true</code>). Only requires that the Grantmaking license is enabled in the org.

Declarative Metadata Sample Definition

The following is an example of an Industries.Settings metadata file.

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

  <enableCompliantDataSharingForIndividualApplication>true</enableCompliantDataSharingForIndividualApplication>

  <enableCompliantDataSharingForFundingAward>true</enableCompliantDataSharingForFundingAward>
</IndustriesSettings>
```

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

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

```
<members>Industries</members>  
<name>Settings</name>  
</types>  
<version>54.0</version>  
</Package>
```

CHAPTER 8 Volunteer Management Standard Objects

In this chapter ...

- [JobPositionAssignment](#)
- [JobPositionQualification](#)
- [JobPositionShift](#)
- [PersonLocationAvailability](#)
- [PositionBenefit](#)
- [PositionQualification](#)
- [VolunteerInitiative](#)

The Volunteer Management data model provides objects and fields to manage volunteer programs and improve the volunteer experience for your organization.

Volunteer Management also uses objects from these clouds.

- [Education Cloud](#)
- [Public Sector Solutions](#)
- [Financial Services Cloud](#)
- [Nonprofit Cloud for Fundraising](#)

EDITIONS

Available in: Lightning Experience

Available in: **Unlimited** and **Developer** Editions.

JobPositionAssignment

Represents the assignment of a person to a specific JobPositionShift on a specific day. This object is available in API version 64.0 and later.

Supported Calls

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

Special Access Rules

This object is available only if the VolunteerManagementPsl permission set license is enabled and the Manage Volunteer Data permission is assigned to users.

Fields

Field	Details
ActualDuration	Type double Properties Create, Filter, Nillable, Sort, Update Description The time difference in hours between the actual start time and actual end time.
ActualEndTime	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The date and time the position assignment actually ended.
ActualStartTime	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The date and time the position assignment actually started.
AssignedAccountId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The lookup to the account record for the position assignment. This field is a relationship field. Relationship Name AssignedAccount Refers To Account
AssignedContactId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The lookup to the contact record for the position assignment. This field is a relationship field. Relationship Name AssignedContact Refers To Contact
AssignedPositionShiftId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The lookup to the job position shift record for the position assignment. This field is a relationship field. Relationship Name AssignedPositionShift Refers To JobPositionShift
DoesCountTowardShiftCapacity	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Determines whether the job position assignment is part of the total capacity of the job position shift. The default value is <code>false</code>.

Field	Details
	This field is available from API version 65.0 and later.
JobPositionId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The lookup to the related job position. This field is a relationship field. Relationship Name JobPosition Refers To JobPosition
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description The name of the job position assignment.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	Description ID of the owner of this object. ID of the creator of this object. This field is a polymorphic relationship field. Relationship Name Owner Refers To Group, User
RelatedVolunteerInitiativeId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The lookup to the primary volunteer initiative for the position assignment. This field is a relationship field. Relationship Name RelatedVolunteerInitiative Refers To VolunteerInitiative
ScheduledEndTime	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The date and time the position assignment is scheduled to end.
ScheduledStartTime	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The date and time the position assignment is scheduled to start.
Status	Type picklist Properties Create, Filter, Group, Sort, Update Description The status of the position assignment. Possible values are:

Field	Details
	• Absent • Awaiting Approval • Canceled • Complete • In Progress • Pending Verification • Upcoming

Associated Objects

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

JobPositionAssignmentChangeEvent

Change events are available for the object.

JobPositionAssignmentFeed

Feed tracking is available for the object.

JobPositionAssignmentHistory

History is available for tracked fields of the object.

JobPositionAssignmentOwnerSharingRule

Sharing rules are available for the object.

JobPositionAssignmentShare

Sharing is available for the object.

JobPositionQualification

Represents a job position qualification. This object is available in API version 64.0 and later.

Supported Calls

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

Special Access Rules

This object is available only if the VolunteerManagementPsl permission set license is enabled and the Manage Volunteer Data permission is assigned to users.

Fields

Field	Details
Description	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The description of the qualification.
JobPositionId	Type reference Properties Create, Filter, Group, Sort Description The job position that's related to the job position qualification. This field is a relationship field. Relationship Name JobPosition Relationship Type Master-detail Refers To JobPosition (the master object)
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
Name	Type string

Field	Details
	Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description The name of the job position qualification.
ProficiencyLevel	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The proficiency level that's required for this qualification. Possible values are: • Advanced • Beginner • Intermediate
QualificationLevel	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The number that represents the level requirement for the qualification.
QualificationReferenceRecordId	Type reference Properties Create, Filter, Group, Sort, Update Description A lookup to the record that confirms the qualification. Options include Competency, Certification, Examination, Education, and Disability records. This field is a polymorphic relationship field. Relationship Name QualificationReferenceRecord Refers To Competency and Examination

Associated Objects

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

JobPositionQualificationChangeEvent

Change events are available for the object.

JobPositionQualificationFeed

Feed tracking is available for the object.

JobPositionQualificationHistory

History is available for tracked fields of the object.

JobPositionQualificationOwnerSharingRule

Sharing rules are available for the object.

JobPositionQualificationShare

Sharing is available for the object.

JobPositionShift

Represents a specific work shift associated with a job position or one of its related recurrence schedules. This object is available in API version 64.0 and later.

Supported Calls

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

Special Access Rules

This object is available only if the VolunteerManagementPsl permission set license is enabled and the Manage Volunteer Data permission is assigned to users.

Fields

Field	Details
Description	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The description of the job position shift.
EndDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The end date of the job position shift.

Field	Details
EndTime	Type time Properties Create, Filter, Nillable, Sort, Update Description The end time of the job position shift.
JobPositionId	Type reference Properties Create, Filter, Group, Sort, Update Description The lookup to the related job position. This field is a relationship field. Relationship Name JobPosition Refers To JobPosition
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
MaximumAttendeesCount	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The maximum capacity for position assignments in the job position shift.

Field	Details
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description The name of the job position shift.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description ID of the owner of this object. ID of the creator of this object. This field is a polymorphic relationship field. Relationship Name Owner Refers To Group, User
PositionAssignmentCount	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The total number of related job position assignments.
RecurrenceScheduleId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The lookup to the related recurrence schedule. This field is a relationship field. Relationship Name RecurrenceSchedule Refers To RecurrenceSchedule
RemainingCapacity	Type int

Field	Details
	Properties Filter, Group, Nillable, Sort Description The remaining capacity after subtracting the position assignments count from the maximum attendees count. This field is a calculated field.
StartDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The start date of the job position shift.
StartTime	Type time Properties Create, Filter, Nillable, Sort, Update Description The start time of the job position shift.
Status	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The status of the job position shift. Possible values are: • Canceled • Complete • In Progress • Upcoming
TimeZone	Type picklist Properties Create, Filter, Group, Restricted picklist, Sort, Update Description The time zone which the operating hours fall within.

Associated Objects

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

JobPositionShiftChangeEvent

Change events are available for the object.

JobPositionShiftFeed

Feed tracking is available for the object.

JobPositionShiftHistory

History is available for tracked fields of the object.

JobPositionShiftOwnerSharingRule

Sharing rules are available for the object.

JobPositionShiftShare

Sharing is available for the object.

PersonLocationAvailability

Represents a the availability of a person at a specific location.. This object is available in API version 64.0 and later.

Supported Calls

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

Special Access Rules

This object is available only if the VolunteerManagementPsl permission set license is enabled and the Manage Volunteer Data permission is assigned to users.

Fields

Field	Details
AccountId	Type reference Properties Create, Filter, Group, Sort, Update Description The lookup to the related account. This field is a relationship field. Relationship Name Account

Field	Details
	Refers To Account
ContactId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The lookup to the related contact. This field is a relationship field. Relationship Name Contact Refers To Contact
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
LocationId	Type reference Properties Create, Filter, Group, Sort, Update Description The lookup to the related location. This field is a relationship field. Relationship Name Location Refers To Location

Field	Details
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description The name of the person location availability.
OperatingHoursId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The lookup to the related operating hours. This field is a relationship field. Relationship Name OperatingHours Refers To OperatingHours
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description ID of the owner of this object. ID of the creator of this object. This field is a polymorphic relationship field. Relationship Name Owner Refers To Group, User
UsageType	Type picklist Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update Description The type of usage for the location availability. For example, Volunteer Management is a usage type. Possible values are: • VolunteerManagement

Field	Details
	The default value is <code>VolunteerManagement</code> .

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as `PersonLocationAvailability`.

PersonLocationAvailabilityChangeEvent

Change events are available for the object.

PersonLocationAvailabilityFeed

Feed tracking is available for the object.

PersonLocationAvailabilityHistory

History is available for tracked fields of the object.

PersonLocationAvailabilityOwnerSharingRule

Sharing rules are available for the object.

PersonLocationAvailabilityShare

Sharing is available for the object.

PositionBenefit

Represents how a position and benefit are related. This object is available in API version 64.0 and later.

Supported Calls

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

Special Access Rules

This object is available only if the `VolunteerManagementPsl` permission set license is enabled and the `Manage Volunteer Data` permission is assigned to users.

Fields

Field	Details
<code>BenefitId</code>	Type reference
	Properties Create, Filter, Group, Sort, Update
	Description The lookup to the related job benefit.

Field	Details
	This field is a relationship field. Relationship Name Benefit Refers To Benefit
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description The name of the position benefit.
PositionId	Type reference Properties Create, Filter, Group, Sort Description The job position that receives the benefit. This field is a relationship field. Relationship Name Position Relationship Type Master-detail Refers To Position (the master object)

Associated Objects

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

PositionBenefitChangeEvent

Change events are available for the object.

PositionBenefitFeed

Feed tracking is available for the object.

PositionBenefitHistory

History is available for tracked fields of the object.

PositionBenefitOwnerSharingRule

Sharing rules are available for the object.

PositionBenefitShare

Sharing is available for the object.

PositionQualification

Represents a position-based qualification. This object is available in API version 64.0 and later.

Supported Calls

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

Special Access Rules

This object is available only if the VolunteerManagementPsl permission set license is enabled and the Manage Volunteer Data permission is assigned to users.

Fields

Field	Details
Description	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The description of the qualification.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort

Field	Details
	Description The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description The name of the position.
PositionId	Type reference Properties Create, Filter, Group, Sort Description The position related to the position qualification. This field is a relationship field. Relationship Name Position Relationship Type Master-detail Refers To Position (the master object)
ProficiencyLevel	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The proficiency level that's required for this qualification. Possible values are: - Advanced - Beginner

Field	Details
	Intermediate
QualificationLevel	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The number that represents the level requirement for the qualification.
QualificationReferenceRecordId	Type reference Properties Create, Filter, Group, Sort, Update Description A lookup to the record that confirms the qualification. Options include Competency, Certification, Examination, Education, and Disability records. This field is a polymorphic relationship field. Relationship Name QualificationReferenceRecord Refers To Competency and Examination

Usage

If a job position requires the person who fills it hold a qualification, the qualification requirement is referenced here. For example, to work as a child care volunteer, the person performing the work is required to hold a current CPR certification. The CPR certification requirement would be referenced in this object.

Associated Objects

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

PositionQualificationChangeEvent

Change events are available for the object.

PositionQualificationFeed

Feed tracking is available for the object.

PositionQualificationHistory

History is available for tracked fields of the object.

PositionQualificationOwnerSharingRule

Sharing rules are available for the object.

PositionQualificationShare

Sharing is available for the object.

VolunteerInitiative

Represents all volunteer activities within a single volunteering initiative. This object is available in API version 64.0 and later.

Supported Calls

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

Special Access Rules

This object is available only if the VolunteerManagementPsl permission set license is enabled and the Manage Volunteer Data permission is assigned to users.

Fields

Field	Details
AttendanceRate	Type percent Properties Create, Filter, Nillable, Sort, Update Description The percentage of volunteers who've fulfilled their commitments to the volunteer initiative up to and including today's date.
Description	Type textarea Properties Create, Filter, Group, Nillable, Sort, Update Description The description of the volunteer initiative.
EndDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The end date of the volunteer initiative.

Field	Details
FilledAssignmentCount	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The total number of filled volunteer position assignments.
IsPublished	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Determines whether the volunteer initiative is accessible in Experience Cloud. The default value is <code>false</code>.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
Name	Type Text Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the volunteer initiative.
OpenAssignmentCount	Type int Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The total number of available volunteer position assignments.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description ID of the owner of this object. ID of the creator of this object. This field is a polymorphic relationship field. Relationship Name Owner Refers To Group, User
ParentVolunteerInitiativeId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The lookup to the parent volunteer initiative. This field is a relationship field. Relationship Name ParentVolunteerInitiative Refers To VolunteerInitiative
StartDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The start date of the volunteer initiative.
Status	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The status of the volunteer initiative. Possible values are:

Field	Details
	• Archived • Canceled • Complete • In Progress • Postponed • Upcoming
TotalActiveVolunteerCount	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The total number of unique, active volunteers for this initiative who have completed the hours eligibility and have PositionAssignment statuses in the configured MaxAttendee eligibility list.
TotalAssignmentCount	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The total number of open volunteer position assignments plus the number of filled volunteer position assignments.
TotalVolunteerHours	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The total number of hours that were volunteered during this initiative.

Associated Objects

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

[VolunteerInitiativeHistory](#)

History is available for tracked fields of the object.

[VolunteerInitiativeOwnerSharingRule](#)

Sharing rules are available for the object.

[VolunteerInitiativeShare](#)

Sharing is available for the object.

CHAPTER 9 Volunteer Management Fields on Other Objects

In this chapter ...

- [ApplicationForm](#)
- [ApplicationRenderMethod](#)
- [ApplicationStageDefinition](#)
- [DonorGiftSummary](#)
- [PersonCompetency](#)
- [Position](#)

Volunteer Management includes fields that are available on other Salesforce objects. These fields are available only in orgs with Nonprofit Cloud when Volunteer Management is enabled.

EDITIONS

Available in: Lightning Experience

Available in: **Unlimited** and **Developer** Editions.

ApplicationForm

Represents the high level information of a submitted application. This object is available in API version 65.0 and later.

Supported Calls

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

Fields

Field	Details
CompletionDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date that the application was completed.
DueDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date when the application is due.
ReferralId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The referral that's associated with the application. This field is a relationship field. Relationship Name Referral Refers To Referral
UsageType	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update

Field	Details
	Description Specifies the usage of application. Possible values are: • Other • Program This value is available from API version 65.0 and later. • Volunteer This value is available from API version 65.0 and later.

ApplicationRenderMethod

Represents how a part of an application can be rendered. This object is available in API version 64.0 and later.

Supported Calls

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

Special Access Rules

This object is available only if the VolunteerManagementPsl permission set license is enabled and the Manage Volunteer Data permission is assigned to users.

Fields

Field	Details
MethodType	Type picklist Properties Create, Filter, Group, Restricted picklist, Sort, Update Description Adding a new attribute to relate Flow metadata in the MethodName field. Possible values are: • FlexCard • Flow • OmniScript
UsageType	Type picklist Properties Create, Filter, Group, Restricted picklist, Sort, Update

Field	Details
	Description Adding a new attribute to relate Flow metadata in the MethodName field. Possible values are: • <code>FormFramework</code>

Associated Objects

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

[ApplicationRenderMethodChangeEvent](#)

Change events are available for the object.

[ApplicationRenderMethodFeed](#)

Feed tracking is available for the object.

[ApplicationRenderMethodHistory](#)

History is available for tracked fields of the object.

[ApplicationRenderMethodOwnerSharingRule](#)

Sharing rules are available for the object.

[ApplicationRenderMethodShare](#)

Sharing is available for the object.

ApplicationStageDefinition

Represents a stage of an application. This object is available in API version 64.0 and later.

Supported Calls

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

Special Access Rules

This object is available only if the VolunteerManagementPsl permission set license is enabled and the Manage Volunteer Data permission is assigned to users.

Fields

Field	Details
<code>EditTypeAppRenderMethodId</code>	Type reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update Description Add an Omniscript or Flexcard for an editable form or application. This field is a relationship field. Relationship Name EditTypeAppRenderMethod Refers To ApplicationRenderMethod
Type	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Select a type of application stage definition. Possible values are: • FormFramework
ViewTypeAppRenderMethodId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description Add an Omniscript or Flexcard for a read-only form or application. This field is a relationship field. Relationship Name ViewTypeAppRenderMethod Refers To ApplicationRenderMethod

Associated Objects

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

ApplicationStageDefinitionChangeEvent

Change events are available for the object.

ApplicationStageDefinitionFeed

Feed tracking is available for the object.

ApplicationStageDefinitionHistory

History is available for tracked fields of the object.

ApplicationStageDefinitionOwnerSharingRule

Sharing rules are available for the object.

ApplicationStageDefinitionShare

Sharing is available for the object.

DonorGiftSummary

Represents gift summaries for accounts and contacts. This object is available in API version 64.0 and later.

Supported Calls

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

Special Access Rules

This object is available only if the VolunteerManagementPsl permission set license is enabled and the Manage Volunteer Data permission is assigned to users.

Fields

Field	Details
FirstVolunJobPstnAsgntDt	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date of the contact's first volunteer shift. Data Processing Engine finds the first job position assignment that's related to a volunteer initiative and calculates the value. You can schedule this calculation to run regularly.
LastVolunJobPstnAsgntDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date of the contact's last volunteer shift. Data Processing Engine calculates this value by finding the most recent job position assignment that is related to a volunteer initiative. You can schedule this calculation to run on a regular basis.

Field	Details
TotalVolunJobPstnAsgnCnt	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The number of times a contact has volunteered, which is the number of job position assignments related to volunteer initiatives. The Data Processing Engine adds the assignments and calculates the value. You can schedule this calculation to run regularly.
TotalVolunteerHours	Type double Properties Create, Filter, Nillable, Sort, Update Description The total hours a contact volunteered. The Data Processing Engine adds the hours from job position assignments related to volunteer initiatives and calculates the value. You can schedule this calculation to run regularly.

Associated Objects

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

>DonorGiftSummaryChangeEvent

Change events are available for the object.

DonorGiftSummaryFeed

Feed tracking is available for the object.

DonorGiftSummaryHistory

History is available for tracked fields of the object.

DonorGiftSummaryOwnerSharingRule

Sharing rules are available for the object.

DonorGiftSummaryShare

Sharing is available for the object.

PersonCompetency

Represents information about a competency that a person has. This object is available in API version 64.0 and later.

Supported Calls

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

Special Access Rules

This object is available only if the VolunteerManagementPsl permission set license is enabled and the Manage Volunteer Data permission is assigned to users.

Fields

Field	Details
QualificationLevel	Type int Properties Create, Filter, Group, Nillabel, Sort, Update Description The number that represents the level requirement for the qualification.

Associated Objects

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

PersonCompetencyChangeEvent

Change events are available for the object.

PersonCompetencyFeed

Feed tracking is available for the object.

PersonCompetencyHistory

History is available for tracked fields of the object.

PersonCompetencyOwnerSharingRule

Sharing rules are available for the object.

PersonCompetencyShare

Sharing is available for the object.

Position

Represents a functional role that is characterized by specific duties and responsibilities, and required skills and qualifications. This object is available in API version 64.0 and later.

Supported Calls

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

Special Access Rules

This object is available only if the VolunteerManagementPsl permission set license is enabled and the Manage Volunteer Data permission is assigned to users.

Fields

Field	Details
IsInternalApprovalRequired	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Determines whether sign-up for the position requires internal approval. The default value is <code>false</code>.
Status	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The status of the position. Possible values are: • Canceled • Complete • In Progress • Upcoming

Associated Objects

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

PositionChangeEvent

Change events are available for the object.

PositionFeed

Feed tracking is available for the object.

PositionHistory

History is available for tracked fields of the object.

PositionOwnerSharingRule

Sharing rules are available for the object.

PositionShare

Sharing is available for the object.

CHAPTER 10 Group Memberships and Households in Nonprofit Cloud

In this chapter ...

- [Group Membership and Households Standard Objects](#)
- [Group Membership and Households Business APIs](#)

This guide provides information about the Group Memberships objects and APIs that Nonprofit Cloud uses.

EDITIONS

Available in: Lightning Experience

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

Group Membership and Households Standard Objects

The Group Membership and Households data model provides objects and fields to represent the relationships used for group memberships.

[AccountAccountRelation](#)

Represents a relationship between accounts, such as a relationship between a business account and a household account. This object is available in API version 57.0 and later.

[AccountContactRelation](#)

Standard and custom fields extend the standard Account object for use in Public Sector Solutions to represent information of members in a household. This object is available in API version 56.0 and later.

[ContactContactRelation](#)

Represents a relationship between contacts. This object is available in API version 57.0 and later.

[PartyRelationshipGroup](#)

Represents a group of people living together such as a household, or a group of people affiliated with each other. This object is available in API version 56.0 and later.

[PartyRoleRelation](#)

Represents information about the type of relationship between the participants. This object is available in API version 57.0 and later.

AccountAccountRelation

Represents a relationship between accounts, such as a relationship between a business account and a household account. This object is available in API version 57.0 and later.

Supported Calls

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

Fields

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

Field	Details
	Refers To Account
EndDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date when the relationship ends.
HierarchyType	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the hierarchy between accounts that are related. For example, an account is related to another account as a parent, peer, or child. Possible values are: - Child - Parent - Peer The default value is <code>Parent</code> .
IsActive	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the account is actively involved with the related account. The default value is <code>false</code> .
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.
LastViewedDate	Type dateTime

Field	Details
	Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view. If this value is null, the user might have only accessed this record or list view (<parmname>LastReferencedDate</parmname>) but not viewed it.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description Name of the account account relationship.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description ID of the owner of this object. This field is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
PartyRoleRelationId	Type reference Properties Create, Filter, Group, Sort, Update Description The relationship between two accounts. This field is a relationship field. Relationship Name PartyRoleRelation Relationship Type Lookup Refers To PartyRoleRelation

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

Associated Objects

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

AccountAccountRelationChangeEvent (API Version 63.0)

Change events are available for the object.

AccountAccountRelationFeed

Feed tracking is available for the object.

AccountAccountRelationHistory

History is available for tracked fields of the object.

AccountAccountRelationOwnerSharingRule

Sharing rules are available for the object.

AccountAccountRelationShare

Sharing is available for the object.

AccountContactRelation

Standard and custom fields extend the standard Account object for use in Public Sector Solutions to represent information of members in a household. This object is available in API version 56.0 and later.

For more information, see [AccountContactRelation](#).

Supported Calls

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

Special Access Rules

Fields

Field	Details
AccountId	Type reference Properties Create, Filter, Group, Sort Description Lookup to the Account object. This field is a relationship field. Relationship Name Account Relationship Type Lookup Refers To Account

Field	Details
ContactId	Type reference Properties Create, Filter, Group, Sort Description Lookup to the Contact object. This field is a relationship field. Relationship Name Contact Relationship Type Lookup Refers To Contact
DataRollupCategories	Type multipicklist Properties Create, Filter, Nillable, Update Description Specifies the categories in which the data associated with a group is aggregated.
EndDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date a relationship between a contact and account ended. Use with the Start Date to keep a history of the relationship.
IsActive	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether relationship is active (true) or not (false). The default value is <code>false</code>.
IsDirect	Type boolean Properties Defaulted on create, Filter, Group, Sort

Field	Details
	Description Indicates whether relationship is direct (true) or not (false). The default value is <code>false</code> .
IsIncludedInGroup	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the data of a group or a business account is included in the Household (true) or not (false). The default value is <code>false</code> .
IsPrimaryGroup	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the group is a primary group for the member (yes) or not (no). The default value is <code>false</code> .
IsPrimaryMember	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the member is a primary contact of a group (true) or not (false). The default value is <code>false</code> .
Roles	Type multipicklist Properties Create, Filter, Nillable, Update Description The contact's participating role in the account. Possible values are: • Daughter • Father • Husband • Mother

Field	Details
	• Other • Son • Wife
StartDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date a relationship between a contact and account began. Use with the End Date to keep a history of the relationship

Associated Objects

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

[AccountContactRelationChangeEvent](#) (API Version 59.0)

Change events are available for the object.

ContactContactRelation

Represents a relationship between contacts. This object is available in API version 57.0 and later.

Supported Calls

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

Fields

Field	Details
ContactId	Type reference Properties Create, Filter, Group, Sort, Update Description ID of the account associated with this contact contact relationship. This field is a relationship field. Relationship Name Contact

Field	Details
	Relationship Type Lookup Refers To Contact
EndDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date when the relationship ends.
HierarchyType	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Indicates the type of association to determine the hierarchy of relationship between the two parties. Possible values are: - Child - Parent - Peer The default value is <code>Parent</code> .
IsActive	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the contact is actively involved with the related contact. The default value is <code>false</code> .
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.

Field	Details
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view. If this value is null, the user might have only accessed this record or list view (<parmname>LastReferencedDate</parmname>) but not viewed it.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description Name of the contact contact relationship.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description ID of the owner of this object. This field is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
PartyRoleRelationId	Type reference Properties Create, Filter, Group, Sort, Update Description The relationship between two contacts. This field is a relationship field. Relationship Name PartyRoleRelation Relationship Type Lookup

Field	Details
	Refers To PartyRoleRelation
RelatedContactId	Type reference Properties Create, Filter, Group, Sort, Update Description The related contact in the relationship. This field is a relationship field. Relationship Name RelatedContact Relationship Type Lookup Refers To Contact
RelatedInverseRecordId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The record that specifies the inverse relationship between the contacts. This field is a relationship field. Relationship Name RelatedInverseRecord Relationship Type Lookup Refers To ContactContactRelation
StartDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date when the relationship starts.

Associated Objects

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

ContactContactRelationChangeEvent (API Version 63.0)

Change events are available for the object.

ContactContactRelationFeed

Feed tracking is available for the object.

ContactContactRelationHistory

History is available for tracked fields of the object.

ContactContactRelationOwnerSharingRule

Sharing rules are available for the object.

ContactContactRelationShare

Sharing is available for the object.

PartyRelationshipGroup

Represents a group of people living together such as a household, or a group of people affiliated with each other. This object is available in API version 56.0 and later.

Supported Calls

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

Fields

Field	Details
AccountId	Type reference Properties Create, Filter, Group, Sort Description The parent account associated with the party relationship group. This field is a relationship field. Relationship Name Account Relationship Type Master-detail Refers To Account (the master object)

Field	Details
Category	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the category of the party relationship group. Possible values are: - Extended Family - Meals together - Staying under same roof
Description	Type textarea Properties Create, Filter, Group, Nillable, Sort, Update Description The description of the party relationship group.
EndDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The end date associated with the party relationship group.
GroupIncome	Type currency Properties Create, Filter, Nillable, Sort, Update Description The total income of the party relationship group.
GroupSize	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The number of active members associated with the party relationship group.
HousingType	Type int

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the housing type of the party relationship group. Examples include home or government-assisted housing. Available in API version 66.0 and later.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate is not null, the user accessed this record or list view indirectly.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the party relationship group.
PrimaryAddress	Type address Properties Filter, Nillable Description The primary address of the party relationship group.
PrimaryCity	Type string Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The primary city of the party relationship group.
PrimaryCountry	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The primary country of the party relationship group.
PrimaryGeocodeAccuracy	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The level of accuracy of a location's geographical coordinates compared with its physical address. A geocoding service typically provides this value based on the party relationship group's latitude and longitude coordinates. Possible values are: • Address • Block • City • County • ExtendedZip—Extended Zip • NearAddress—Near Address • Neighborhood • State • Street • Unknown • Zip
PrimaryLatitude	Type double Properties Create, Filter, Nillable, Sort, Update Description Used with Longitude to specify the precise geolocation of the party relationship group. Acceptable values are numbers between –90 and 90 with up to 15 decimal places.
PrimaryLongitude	Type double

Field	Details
	Properties Create, Filter, Nillable, Sort, Update Description Used with Latitude to specify the precise geolocation of the party relationship group. Acceptable values are numbers between –180 and 180 with up to 15 decimal places.
PrimaryPostalCode	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The primary postal code of the party relationship group.
PrimaryState	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The primary state of the party relationship group.
PrimaryStreet	Type textarea Properties Create, Filter, Group, Nillable, Sort, Update Description The primary street of the party relationship group.
StartDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The start date associated with the party relationship group.
Status	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The status of the party relationship group. Possible values are:

Field	Details
	- Active - Inactive The default value is Active.
Subtype	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The subclassification of the party relationship group type. Possible values are: - Extension Household - Nuclear Household - Three Person Household
Type	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The type of the party relationship group. Possible values are: - Group - Household The default value is Group.

Associated Objects

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

[PartyRelationshipGroupChangeEvent](#) (API Version 63.0)

Change events are available for the object.

[PartyRelationshipGroupFeed](#)

Feed tracking is available for the object.

[PartyRelationshipGroupHistory](#)

History is available for tracked fields of the object.

PartyRoleRelation

Represents information about the type of relationship between the participants. This object is available in API version 57.0 and later.

Supported Calls

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

Fields

Field	Details
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description Name of the party role relationship.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description ID of the owner of this object. This field is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup

Field	Details
	Refers To Group, User
RelatedInverseRecordId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The record that specifies the inverse relationship between the roles. This field is a relationship field. Relationship Name RelatedInverseRecord Relationship Type Lookup Refers To PartyRoleRelation
RelatedRoleName	Type string Properties Create, Filter, Group, Sort, Update Description The role that's related to another role in the relationship.
RelationshipObjectName	Type picklist Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update Description The object that's associated with the relationship. Possible values are: - Account_Account_Relationship—Account Account Relationship - Contact_Contact_Relationship—Contact Contact Relationship The default value is Account_Account_Relationship.
RoleName	Type string Properties Create, Filter, Group, Sort, Update

Field	Details
	Description The name of the role in the relationship.
ShouldCreateInverseRoleAuto	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort
	Description Indicates whether a role record should be created automatically for the relationship (true) or not (false). The default value is <code>false</code> .

Associated Objects

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

[PartyRoleRelationChangeEvent](#) (API Version 63.0)

Change events are available for the object.

[PartyRoleRelationFeed](#)

Feed tracking is available for the object.

[PartyRoleRelationHistory](#)

History is available for the object.

[PartyRoleRelationOwnerSharingRule](#)

Sharing rules are available for the object.

[PartyRoleRelationShare](#)

Sharing is available for the object.

Group Membership and Households Business APIs

Use business APIs to define and manage party relationship groups of individuals or trusts.

Special Access Rules

To create party relationship groups, users need the Group Membership permission set. To merge party relationship groups, users must clone the Group Membership permission set, and enable the Merge and Split Groups system permission in the cloned permission set.

[REST Reference](#)

You can access the Group Membership and Households APIs using REST endpoints. These REST APIs follow similar conventions as Connect REST APIs.

SEE ALSO:

[Salesforce Help: Group Membership and Households](#)

REST Reference

You can access the Group Membership and Households 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](#)

The Group Membership and Households APIs have these resources.

[Request Bodies](#)

The Group Membership and Households APIs have these request bodies.

[Response Bodies](#)

The Group Membership and Households APIs have these response bodies.

Resources

The Group Membership and Households APIs have these resources.

[Group Definitions \(POST\)](#)

Define a party relationship group of individuals or trusts to deliver support services or to manage shared processes, such as cases and benefits.

[Group Definitions Merge \(POST\)](#)

Merge the details, members, member relationships, and relationships of a party relationship group.

[Group Fields \(GET\)](#)

Retrieve details from two party relationship groups.

[Group Related Records \(GET\)](#)

Get the related records of a party relationship group.

Group Definitions (POST)

Define a party relationship group of individuals or trusts to deliver support services or to manage shared processes, such as cases and benefits.

Resource

```
/connect/group/group-definitions
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v66.0/connect/group/group-definitions
```

Available version

58.0

Requires Chatter

No

HTTP methods

POST

Request body for POST**JSON example**

```
{
  "accountDetail":{
    "name":"prg5",
    "ownerId":"005xx000001X7tNAAS",
    "billingAddress":{
      "street":"",
      "city":"Los Angeles",
      "state":"California",
      "country":"USA",
      "postalCode":"90042"
    },
    "shippingAddress":{
      "street":"",
      "city":"Los Angeles",
      "state":"California",
      "country":"USA",
      "postalCode":"90042"
    },
    "phone":"0123456789"
  },
  "groupDetail":{
    "name":"prg5",
    "category":"Staying under the same roof",
    "type":"Household",
    "groupSize":"2",
    "groupIncome":"20000",
    "primaryAddress":{
      "street":"",
      "city":"Los Angeles",
      "state":"California",
      "country":"USA",
      "postalCode":"90042"
    }
  },
  "member":{
    "records":[
      {
        "contactId":"003xx000004WhHQA0",
        "roles":"Decision Maker",
        "relations":[]
      }
    ]
  }
}
```



```

        {
          "roleRelationId": "0z1xx0000000001AAA",
          "relatedContactId": "003xx000004WhJ2AAK",
          "startDate": "2023-06-14T00:00:00.000Z"
        }
      ]
    },
    "externalMember": {
      "records": [
        {
          "contactId": "003xx000004WhJ2AAK",
          "roles": "Decision Maker"
        }
      ]
    },
    "relatedGroup": {
      "relations": [
        {
          "type": "Direct",
          "roleRelationId": "0z1xx0000000001dAAA",
          "relatedAccountId": "001xx000003GYodAAG"
        }
      ]
    },
    "relatedAccount": {
      "relations": [
        ]
    }
  }
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
account Detail	Map<String, Object>	Account details associated with the party relationship group.	Required	58.0
external Member	Member Record Input[]	External member details of the party relationship group.	Optional	58.0
groupDetail	Map<String, Object>	Party relationship group details, such as group size, group income, address, and associated custom fields.	Required	58.0
member	Member Record Input[]	Member details of the party relationship group being created.	Required	58.0
related Account	Account Relation Input[]	Data of the account that's related to the party relationship group being created.	Optional	58.0

Name	Type	Description	Required or Optional	Available Version
relatedGroup	Account Relation Input[]	Data of the group that's related to the party relationship group being created.	Optional	58.0

Response body for POST[Group Definition](#)**Group Definitions Merge (POST)**

Merge the details, members, member relationships, and relationships of a party relationship group.

Resource

```
/connect/group/group-definitions/actions/merge
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v66.0/connect/group/group-definitions/actions/merge
```

Available version

58.0

Requires Chatter

No

HTTP methods

POST

Request body for POST**JSON example**

```
{
  "primaryAccountId": "001RM000005aGUcYAM",
  "secondaryAccountId": "001RM000005YYfiYAG",
  "accountDetail": {
    "customFields": {
      "Account_CF1__c": "123",
      "Account_CF2__c": "342"
    },
    "name": "Jones-Marshal HH",
    "fax": "213762",
    "billingAddress": {
      "street": "",
      "city": "",
      "state": "",
      "country": "",
      "postalCode": ""
    },
    "shippingAddress": {
      "street": "",
      "city": "",
      "state": "",
      "country": ""
    }
  }
}
```

```

        "postalCode":""
    },
    "annualRevenue":"1500",
    "numberOfEmployees":"35",
    "type":"Agriculture"
},
"groupDetail":{
    "customFields":{
        "CF2__c":"123"
    },
    "name":"Jones-Marshal HH",
    "category":"Staying under the same roof",
    "status":"Active",
    "description":"Merged household from Jones and Marshal HH",
    "type":"Household",
    "groupSize":"52",
    "groupIncome":"4132",
    "primaryAddress":{
        "street":"",
        "city":"",
        "state":"",
        "country":"",
        "postalCode":""
    },
    "partyRelationGroupId":"0wKRM000000001n2AA"
},
"member":{
    "records":[
        {
            "acrId":"07kRM000000Op0fYAC",
            "contactId":"003RM00000895N9YAI",
            "isPrimaryMember":false,
            "isActive":true,
            "isPrimaryGroup":false,
            "roles":"Economic Decision Maker;Decision Maker",
            "direct":false,
            "customFields":{
                "CF1__c":"2023-02-20",
                "CF2__c":"CF2: Geoff"
            },
            "relations":[]
        },
        {
            "acrId":"07kRM000000KXvrYAG",
            "contactId":"003RM00000895NDYAY",
            "isPrimaryMember":true,
            "isActive":true,
            "isPrimaryGroup":false,
            "roles":"Decision Maker",
            "direct":false,
            "customFields":{
                "CF1__c":"2023-02-19",

```

```

        "CF2__c":"CF2: Howard"
      },
      "relations":[
    ]
  },
  {
    "acrId":"07kRM000000KYHkYAO",
    "contactId":"003RM000008D6q0YAC",
    "isPrimaryMember":false,
    "isActive":true,
    "isPrimaryGroup":false,
    "roles":"Other; Influencer",
    "direct":false,
    "customFields":{
      "CF1__c":"2023-03-08"
    },
    "relations":[
      {
        "ccrId":"0zmRM000000002EYAQ",
        "roleRelationId":"0zlRM0000000014YAA",
        "relatedContactId":"003RM00000895N9YAI",
        "isActive":false
      },
      {
        "ccrId":"0zmRM000000002NYAQ",
        "roleRelationId":"0zlRM00000004CAaYAM",
        "relatedContactId":"003RM00000895N9FYAY",
        "isActive":true
      }
    ]
  }
]
},
"externalMember":{
  "records":[
    {
      "acrId":"07kRM000000KYHpYAO",
      "contactId":"003RM00000895N9FYAY",
      "isPrimaryMember":false,
      "isActive":true,
      "isPrimaryGroup":false,
      "roles":"Technical Buyer",
      "direct":false,
      "relations":[
    ]
    },
    {
      "acrId":"07kRM000000OpPdYAK",
      "contactId":"003RM0000089pihYAA",
      "isPrimaryMember":false,
      "isActive":true,
      "isPrimaryGroup":false,

```

```

        "roles": "Influencer",
        "direct": false,
        "relations": [
            ]
        }
    ],
    "relatedGroup": {
        "relations": [
            {
                "aarId": "0zoRM00000004CBKYA2",
                "roleRelationId": "0zlRM000000001JYAQ",
                "accountId": "001RM0000005aVTBYA2",
                "relatedAccountId": "001RM0000005aGUcYAM",
                "isActive": true,
                "hierarchyType": "Peer",
                "customFields": {
                    "CF3__c": false
                }
            },
            {
                "aarId": "0zoRM000000003KYAQ",
                "roleRelationId": "0zlRM00000004C9mYAE",
                "accountId": "001RM0000005YNUAYA4",
                "relatedAccountId": "001RM0000005aGUcYAM",
                "startDate": "2023-03-05T00:00:00.000Z",
                "endDate": "2023-03-31T00:00:00.000Z",
                "isActive": true,
                "hierarchyType": "Parent",
                "customFields": {
                    "CF3__c": false
                }
            },
            {
                "aarId": "0zoRM000000003PYAQ",
                "roleRelationId": "0zlRM00000004C9mYAE",
                "accountId": "001RM0000005YNUTYA4",
                "relatedAccountId": "001RM0000005aGUcYAM",
                "startDate": "2023-03-05T00:00:00.000Z",
                "endDate": "2023-03-31T00:00:00.000Z",
                "isActive": true,
                "hierarchyType": "Parent",
                "customFields": {
                    "CF3__c": false
                }
            },
            {
                "aarId": "0zoRM00000004CBAYA2",
                "roleRelationId": "0zlRM000000001JYAQ",
                "accountId": "001RM0000005iEBkYAM",
                "relatedAccountId": "001RM0000005aGUcYAM",
                "isActive": true,
                "hierarchyType": "Peer",
            }
        ]
    }
}

```

```

        "customFields":{
            "CF3__c":false
        }
    },
    {
        "aarId":"0zoRM000000003GYAQ",
        "roleRelationId":"0zlRM00000004C9mYAE",
        "accountId":"001RM000005YNUOYA4",
        "relatedAccountId":"001RM000005aGUcYAM",
        "startDate":"2023-03-05T00:00:00.000Z",
        "endDate":"2023-03-31T00:00:00.000Z",
        "isActive":true,
        "hierarchyType":"Parent",
        "customFields":{
            "CF3__c":false
        }
    },
    {
        "aarId":"0zoRM00000004CDPYA2",
        "roleRelationId":"0zlRM00000004C9mYAE",
        "accountId":"001RM000005aVWKYA2",
        "relatedAccountId":"001RM000005aGUcYAM",
        "startDate":"2023-03-05T00:00:00.000Z",
        "endDate":"2023-03-31T00:00:00.000Z",
        "isActive":true,
        "hierarchyType":"Parent",
        "customFields":{
            "CF3__c":false
        }
    },
    {
        "aarId":"0zoRM00000004CBFYA2",
        "roleRelationId":"0zlRM000000001JYAQ",
        "accountId":"001RM000005aVSIYA2",
        "relatedAccountId":"001RM000005aGUcYAM",
        "startDate":"2023-03-07T00:00:00.000Z",
        "endDate":"2023-04-08T00:00:00.000Z",
        "isActive":true,
        "hierarchyType":"Peer",
        "customFields":{
            "CF3__c":false
        }
    }
]
},
"relatedAccount":{
    "relations":[
        {
            "aarId":"0zoRM00000004CAuYAM",
            "roleRelationId":"0zlRM00000004C9mYAE",
            "accountId":"001RM000005aGUcYAM",
            "relatedAccountId":"001RM000005ZLa5YAG",
            "isActive":true,
            "hierarchyType":"Peer",

```

```

        "customFields":{
            "CF3__c":false,
            "CF4__c":"A;C"
        }
    },
    {
        "aarId":"0zoRM00000004CB4YAM",
        "roleRelationId":"0zlRM000000001JYAQ",
        "accountId":"001RM000005aGUcYAM",
        "relatedAccountId":"001RM000005aGUNYA2",
        "isActive":false,
        "hierarchyType":"Peer",
        "customFields":{
            "CF3__c":false,
            "CF4__c":"A;D"
        }
    },
    {
        "aarId":"0zoRM000000004mYAA",
        "roleRelationId":"0zlRM000000001TYAQ",
        "accountId":"001RM000005aGUcYAM",
        "relatedAccountId":"001RM000005YXsUYAW",
        "isActive":true,
        "hierarchyType":"Peer",
        "customFields":{
            "CF3__c":true,
            "CF4__c":"A;C"
        }
    }
]
},
"tasks":[
    "a03RM0000001Npi",
    "a03RM0000001Npn"
]
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
account Detail	Account Input	Details of the merged account.	Required	58.0
external Member	Member Record Input	Details of the external members of a party relationship group.	Optional	58.0
groupDetail	Group Input	Details of the party relationship group, such as category, address, group size, group income, and custom fields.	Required	58.0
member	Member Record Input	Details of the party relationship group members.	Required	58.0

Name	Type	Description	Required or Optional	Available Version
primary AccountId	String	ID of the primary account.	Required	58.0
related Account	Account Relation Input	Details of the related account.	Optional	58.0
relatedGroup	Account Relation Input	Details of the party relationship group.	Optional	58.0
secondary AccountId	String	ID of the secondary account.	Required	58.0
tasks	String[]	List of the records to create tasks for. For example, a task to assign benefits from the source party relationship group to the destination party relationship group.	Optional	58.0

Response body for POST[Group Definition](#)**Group Fields (GET)**

Retrieve details from two party relationship groups.

Resource`/connect/group/group-fields`**Resource example**`https://yourInstance.salesforce.com/services/data/v66.0/connect/group/group-fields?groupIds=<0wKRM0000000001n2AA>,<0wKRM0000000004n2YY>`**Available version**

58.0

Requires Chatter

No

HTTP methods

GET

Request parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
groupIds	String[]	Comma-separated list of the group IDs to merge the party relationship group details.	Required	58.0

Response body for GET[Group Fields](#)

Group Related Records (GET)

Get the related records of a party relationship group.

Resource

```
/connect/group/accounts/${accountId}/related-records
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v66.0/connect/group/accounts/${001RM000005aVSTYA2}/related-records
```

Available version

58.0

Requires Chatter

No

HTTP methods

GET

Response body for GET

[Group Related Entity](#)

Request Bodies

The Group Membership and Households APIs have these request bodies.

[Address Input](#)

Input representation of an account address or a party relationship group address.

[Account Input](#)

Input representation of an account.

[Account Relation Input](#)

Input representation of an account relationship.

[Group Definition Input](#)

Input representation of a party relationship group definition.

[Group Input](#)

Input representation of a party relationship group.

[Group Merge Input](#)

Input representation of a merge party relationship group request.

[Member Record Input](#)

Input representation of the member records of a party relationship group.

[Relationships Input](#)

Input representation of the relationship among members of a party relationship group.

Address Input

Input representation of an account address or a party relationship group address.

JSON example

```
"billingAddress":{
  "street": "",
  "city": "Los Angeles",
  "state": "California",
  "country": "USA",
  "postalCode": "94263"
},
"shippingAddress":{
  "street": "",
  "city": "Los Angeles",
  "state": "California",
  "country": "USA",
  "postalCode": "94263"
},
```

Properties

Name	Type	Description	Required or Optional	Available Version
city	String	City of the account or the party relationship group.	Optional	58.0
country	String	Country of the account or the party relationship group.	Optional	58.0
postalCode	String	Postal code of the account or the party relationship group.	Optional	58.0
state	String	State of the account or the party relationship group.	Optional	58.0
street	String	Street of the account or the party relationship group.	Optional	58.0

Account Input

Input representation of an account.

JSON example

```
"accountDetail":{
  "name": "prg5",
  "ownerId": "005xx000001X7tNAAS",
  "billingAddress":{
    "street": "",
    "city": "Los Angeles",
    "state": "California",
    "country": "USA",
    "postalCode": "90042"
  },
}
```

```

    "shippingAddress":{
      "street": "",
      "city": "Los Angeles",
      "state": "California",
      "country": "USA",
      "postalCode": "11111"
    },
    "phone": "0123456789"
  }

```

Properties

Name	Type	Description	Required or Optional	Available Version
accountId	String	ID of the account.	Required	58.0
accountNumber	String	Account number assigned to the account.	Optional	58.0
accountSite	String	Location of the account.	Optional	58.0
accountSource	String	Source of the account record.	Optional	58.0
annualRevenue	String	Estimated annual revenue of the account.	Optional	58.0
billingAddress	Address Input	Billing address of the account.	Optional	58.0
customFields	Map<String, Object>	Custom fields associated with the account.	Optional	58.0
description	String	Text description of the account.	Optional	58.0
fax	String	Fax number of the account.	Optional	58.0
industry	String	Industry associated with the account.	Optional	58.0
jigsaw	String	References the ID of a company in Data.com.	Optional	58.0
name	String	Name of the account.	Required	58.0
numberOfEmployees	String	Number of employees working at the company represented by the account.	Optional	58.0
ownerId	String	ID of the user who currently owns the account.	Optional	58.0
ownership	String	Ownership type for the account.	Optional	58.0
parentId	String	ID of the parent object, if any.	Optional	58.0
phone	String	Phone number of the account.	Optional	58.0
rating	String	Account's prospect rating.	Optional	58.0
recordType	String	ID of the record type assigned to the object.	Optional	58.0

Name	Type	Description	Required or Optional	Available Version
shippingAddress	Address Input	Shipping address of the account.	Optional	58.0
sic	String	Standard Industrial Classification (SIC) code of the company's main business categorization.	Optional	58.0
sicDesc	String	Brief description of the org's line of business, based on its SIC code.	Optional	58.0
tickerSymbol	String	Stock market symbol of the account.	Optional	58.0
tier	String	Tier type of the account.	Optional	58.0
type	String	Type of account.	Optional	58.0
website	String	Website of the account.	Optional	58.0

Account Relation Input

Input representation of an account relationship.

JSON example

```
{
  "relations": [
    {
      "type": "Direct",
      "roleRelationId": "0z1xx000000001dAAA",
      "relatedAccountId": "001xx000003GYodAAG",
      "startDate": "2023-06-15T00:00:00.000Z",
      "endDate": "2023-12-15T00:00:00.000Z",
      "relatedInverseRecordId": "",
      "isActive": true,
      "customFields": {
        "field1": "field1Value",
        "field2": "field1Value"
      }
    },
    {
      "type": "Indirect",
      "roleRelationId": "0z1xx000000001dGAC",
      "accountId": "001xx000003GYodACD",
      "startDate": "2023-02-15T00:00:00.000Z",
      "endDate": "2023-09-15T00:00:00.000Z",
      "isActive": true,
      "customFields": {
        "field1": "field1Value",
        "field2": "field1Value"
      }
    }
  ]
}
```

```

    ]
  }

```

Properties

Name	Type	Description	Required or Optional	Available Version
<code>aarId</code>	String	Record ID of the AccountRelationship object.	Optional	58.0
<code>accountId</code>	String	Primary account involved in the relationship. If the account relationship type is direct, then Account ID is required.	Optional	58.0
<code>customFields</code>	Map<String, Object>	Custom fields associated with the AccountRelationship object.	Optional	58.0
<code>endDate</code>	String	Date when the account relationship ends.	Optional	58.0
<code>hierarchyType</code>	String	Hierarchy among the accounts that are related. For example, an account is related to another account as a parent, a peer, or a child.	Optional	58.0
<code>isActive</code>	Boolean	Indicates whether the account is actively involved with the related account (<code>true</code>) or not (<code>false</code>).	Optional	58.0
<code>relatedAccountId</code>	String	Record ID of the related account. If the account relationship type is direct, then the related account ID is required.	Optional	58.0
<code>relatedInverseRecordId</code>	String	Record ID of the related inverse relationship record.	Optional	58.0
<code>roleRelationId</code>	String	Record ID of the party role relationship.	Required	58.0
<code>startDate</code>	String	Date when the account relationship starts.	Optional	58.0
<code>type</code>	String	Type of account relationship, such as a direct or indirect relationship. The default value is <code>false</code> . If the <code>relatedInverseRecordId</code> property is specified, then the relationship type is indirect.	Optional	58.0

Group Definition Input

Input representation of a party relationship group definition.

JSON example

```
{
  "accountDetail":{
    "name":"prg5",
    "ownerId":"005xx000001X7tNAAS",
    "billingAddress":{
      "street":"",
      "city":"Los Angeles",
      "state":"California",
      "country":"USA",
      "postalCode":"90042"
    },
    "shippingAddress":{
      "street":"",
      "city":"Los Angeles",
      "state":"California",
      "country":"USA",
      "postalCode":"90042"
    },
    "phone":"0123456789"
  },
  "groupDetail":{
    "name":"prg5",
    "category":"Staying under the same roof",
    "type":"Household",
    "groupSize":"2",
    "groupIncome":"20000",
    "primaryAddress":{
      "street":"",
      "city":"Los Angeles",
      "state":"California",
      "country":"USA",
      "postalCode":"90042"
    }
  },
  "member":{
    "records":[
      {
        "contactId":"003xx000004WhHQA0",
        "roles":"Decision Maker",
        "relations":[
          {
            "roleRelationId":"0z1xx0000000001AAA",
            "relatedContactId":"003xx000004WhJ2AAK",
            "startDate":"2023-06-14T00:00:00.000Z"
          }
        ]
      }
    ]
  },
  "externalMember":{
    "records":[
      {

```

```
        "contactId": "003xx000004WhJ2AAK",
        "roles": "Decision Maker"
      }
    ],
    },
    "relatedGroup": {
      "relations": [
        {
          "type": "Direct",
          "roleRelationId": "0z1xx000000001dAAA",
          "relatedAccountId": "001xx000003GYodAAG"
        }
      ]
    },
    "relatedAccount": {
      "relations": [
        ]
      }
    }
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
accountDetail	Map<String, Object>	Account details associated with the party relationship group.	Required	58.0
externalMember	Member Record Input[]	External member details of the party relationship group.	Optional	58.0
groupDetail	Map<String, Object>	Party relationship group details, such as group size, group income, address, and associated custom fields.	Required	58.0
member	Member Record Input[]	Member details of the party relationship group being created.	Required	58.0
relatedAccount	Account Relation Input[]	Data of the account that's related to the party relationship group being created.	Optional	58.0
relatedGroup	Account Relation Input[]	Data of the group that's related to the party relationship group being created.	Optional	58.0

Group Input

Input representation of a party relationship group.

JSON example

```
"groupDetail": {
  "name": "prg5",
  "category": "Staying under the same roof",
}
```

```

    "type": "Household",
    "groupSize": "2",
    "groupIncome": "20000",
    "primaryAddress": {
      "street": "",
      "city": "Los Angeles",
      "state": "California",
      "country": "USA",
      "postalCode": "90042"
    }
  }
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
category	String	Category of the party relationship group.	Optional	58.0
customFields	Map<String, Object>	Custom fields associated with the party relationship group.	Optional	58.0
description	String	Description of the party relationship group.	Optional	58.0
endDate	String	End date associated with the party relationship group.	Optional	58.0
groupIncome	String	Total income of the party relationship group.	Optional	58.0
groupSize	String	Number of active members associated with the party relationship group.	Optional	58.0
name	String	Name of the party relationship group.	Required	58.0
partyRelation GroupId	String	Record ID of the party relationship group. Record ID is optional when creating a group and required when merging groups.	Required	58.0
primary Address	Address Input	Primary address of the party relationship group.	Required	58.0
startDate	String	Start date associated with the party relationship group.	Optional	58.0
status	String	Status of the party relationship group. Valid values are: - Active - Inactive	Optional	58.0
subtype	String	Subclassification of the party relationship group type.	Optional	58.0

Name	Type	Description	Required or Optional	Available Version
type	String	Type of the party relationship group. Valid values are: - Group - Household	Required	58.0

Group Merge Input

Input representation of a merge party relationship group request.

JSON example

```
{
  "primaryAccountId": "001RM000005aGUcYAM",
  "secondaryAccountId": "001RM000005YYfiYAG",
  "accountDetail": {
    "customFields": {
      "Account_CF1__c": "123",
      "Account_CF2__c": "342"
    },
    "name": "Jones-Marshal HH",
    "fax": "213762",
    "billingAddress": {
      "street": "",
      "city": "",
      "state": "",
      "country": "",
      "postalCode": ""
    },
    "shippingAddress": {
      "street": "",
      "city": "",
      "state": "",
      "country": "",
      "postalCode": ""
    },
    "annualRevenue": "1500",
    "numberOfEmployees": "35",
    "type": "Agriculture"
  },
  "groupDetail": {
    "customFields": {
      "CF2__c": "123"
    },
    "name": "Jones-Marshal HH",
    "category": "Staying under the same roof",
    "status": "Active",
    "description": "Merged household from Jones and Marshal HH",
    "type": "Household",
    "groupSize": "52",
    "groupIncome": "4132",
  }
}
```

```

    "primaryAddress":{
      "street":"","
      "city":"","
      "state":"","
      "country":"","
      "postalCode":""
    },
    "partyRelationGroupId":"0wKRM000000001n2AA"
  },
  "member":{
    "records":[
      {
        "acrId":"07kRM000000Op0fYAC",
        "contactId":"003RM00000895N9YAI",
        "isPrimaryMember":false,
        "isActive":true,
        "isPrimaryGroup":false,
        "roles":"Economic Decision Maker;Decision Maker",
        "direct":false,
        "customFields":{
          "CF1__c":"2023-02-20",
          "CF2__c":"CF2: Geoff"
        },
        "relations":[

        ]
      },
      {
        "acrId":"07kRM000000KXvrYAG",
        "contactId":"003RM00000895NDYAY",
        "isPrimaryMember":true,
        "isActive":true,
        "isPrimaryGroup":false,
        "roles":"Decision Maker",
        "direct":false,
        "customFields":{
          "CF1__c":"2023-02-19",
          "CF2__c":"CF2: Howard"
        },
        "relations":[

        ]
      },
      {
        "acrId":"07kRM000000KYHkYAO",
        "contactId":"003RM000008D6q0YAC",
        "isPrimaryMember":false,
        "isActive":true,
        "isPrimaryGroup":false,
        "roles":"Other;Influencer",
        "direct":false,
        "customFields":{
          "CF1__c":"2023-03-08"
        },

```

```

        "relations":[
          {
            "ccrId":"0zmRM000000002EYAQ",
            "roleRelationId":"0zlRM0000000014YAA",
            "relatedContactId":"003RM00000895N9YAI",
            "isActive":false
          },
          {
            "ccrId":"0zmRM000000002NYAQ",
            "roleRelationId":"0zlRM00000004CAaYAM",
            "relatedContactId":"003RM00000895N9FYAY",
            "isActive":true
          }
        ]
      },
    ],
    "externalMember":{
      "records":[
        {
          "acrId":"07kRM0000000KYHpYAO",
          "contactId":"003RM00000895N9FYAY",
          "isPrimaryMember":false,
          "isActive":true,
          "isPrimaryGroup":false,
          "roles":"Technical Buyer",
          "direct":false,
          "relations":[]
        },
        {
          "acrId":"07kRM0000000OpPdYAK",
          "contactId":"003RM00000895pihYAA",
          "isPrimaryMember":false,
          "isActive":true,
          "isPrimaryGroup":false,
          "roles":"Influencer",
          "direct":false,
          "relations":[]
        }
      ]
    },
    "relatedGroup":{
      "relations":[
        {
          "aarId":"0zoRM00000004CBKYA2",
          "roleRelationId":"0zlRM000000001JYAQ",
          "accountId":"001RM000005aVTBYA2",
          "relatedAccountId":"001RM000005aGUcYAM",
          "isActive":true,
          "hierarchyType":"Peer",

```

```

      "customFields":{
        "CF3__c":false
      }
    },
    {
      "aarId":"0zoRM000000003KYAQ",
      "roleRelationId":"0z1RM0000004C9mYAE",
      "accountId":"001RM000005YNUYAY4",
      "relatedAccountId":"001RM000005aGUcYAM",
      "startDate":"2023-03-05T00:00:00.000Z",
      "endDate":"2023-03-31T00:00:00.000Z",
      "isActive":true,
      "hierarchyType":"Parent",
      "customFields":{
        "CF3__c":false
      }
    },
    {
      "aarId":"0zoRM000000003PYAQ",
      "roleRelationId":"0z1RM0000004C9mYAE",
      "accountId":"001RM000005YNUTYA4",
      "relatedAccountId":"001RM000005aGUcYAM",
      "startDate":"2023-03-05T00:00:00.000Z",
      "endDate":"2023-03-31T00:00:00.000Z",
      "isActive":true,
      "hierarchyType":"Parent",
      "customFields":{
        "CF3__c":false
      }
    },
    {
      "aarId":"0zoRM00000004CBAYA2",
      "roleRelationId":"0z1RM000000001JYAQ",
      "accountId":"001RM000005iEBkYAM",
      "relatedAccountId":"001RM000005aGUcYAM",
      "isActive":true,
      "hierarchyType":"Peer",
      "customFields":{
        "CF3__c":false
      }
    },
    {
      "aarId":"0zoRM000000003GYAQ",
      "roleRelationId":"0z1RM0000004C9mYAE",
      "accountId":"001RM000005YNUOYA4",
      "relatedAccountId":"001RM000005aGUcYAM",
      "startDate":"2023-03-05T00:00:00.000Z",
      "endDate":"2023-03-31T00:00:00.000Z",
      "isActive":true,
      "hierarchyType":"Parent",
      "customFields":{
        "CF3__c":false
      }
    }
  ],

```

```

    {
      "aarId": "0zoRM00000004CDPYA2",
      "roleRelationId": "0zlRM00000004C9mYAE",
      "accountId": "001RM000005aVWKYA2",
      "relatedAccountId": "001RM000005aGUcYAM",
      "startDate": "2023-03-05T00:00:00.000Z",
      "endDate": "2023-03-31T00:00:00.000Z",
      "isActive": true,
      "hierarchyType": "Parent",
      "customFields": {
        "CF3__c": false
      }
    },
    {
      "aarId": "0zoRM00000004CBFYA2",
      "roleRelationId": "0zlRM000000001JYAQ",
      "accountId": "001RM000005aVSIYA2",
      "relatedAccountId": "001RM000005aGUcYAM",
      "startDate": "2023-03-07T00:00:00.000Z",
      "endDate": "2023-04-08T00:00:00.000Z",
      "isActive": true,
      "hierarchyType": "Peer",
      "customFields": {
        "CF3__c": false
      }
    }
  ]
},
"relatedAccount": {
  "relations": [
    {
      "aarId": "0zoRM00000004CAuYAM",
      "roleRelationId": "0zlRM00000004C9mYAE",
      "accountId": "001RM000005aGUcYAM",
      "relatedAccountId": "001RM000005ZLa5YAG",
      "isActive": true,
      "hierarchyType": "Peer",
      "customFields": {
        "CF3__c": false,
        "CF4__c": "A;C"
      }
    },
    {
      "aarId": "0zoRM00000004CB4YAM",
      "roleRelationId": "0zlRM000000001JYAQ",
      "accountId": "001RM000005aGUcYAM",
      "relatedAccountId": "001RM000005aGUNYA2",
      "isActive": false,
      "hierarchyType": "Peer",
      "customFields": {
        "CF3__c": false,
        "CF4__c": "A;D"
      }
    }
  ],

```

```

    {
      "aarId": "0zoRM000000004mYAA",
      "roleRelationId": "0zlRM000000001TYAQ",
      "accountId": "001RM000005aGUcYAM",
      "relatedAccountId": "001RM000005YXsUYAW",
      "isActive": true,
      "hierarchyType": "Peer",
      "customFields": {
        "CF3__c": true,
        "CF4__c": "A;C"
      }
    }
  ],
  "tasks": [
    "a03RM0000001Npi",
    "a03RM0000001Npn"
  ]
}

```

Properties

Name	Type	Description	Required or Optional	Available Version
accountDetail	Account Input	Details of the merged account.	Required	58.0
externalMember	Member Record Input	Details of the external members of a party relationship group.	Optional	58.0
groupDetail	Group Input	Details of the party relationship group, such as category, address, group size, group income, and custom fields.	Required	58.0
member	Member Record Input	Details of the party relationship group members.	Required	58.0
primaryAccountId	String	ID of the primary account.	Required	58.0
relatedAccount	Account Relation Input	Details of the related account.	Optional	58.0
relatedGroup	Account Relation Input	Details of the party relationship group.	Optional	58.0
secondaryAccountId	String	ID of the secondary account.	Required	58.0
tasks	String[]	List of the records to create tasks for. For example, a task to assign benefits from the source party relationship group to the destination party relationship group.	Optional	58.0

Member Record Input

Input representation of the member records of a party relationship group.

JSON example

```
{
  "records": [
    {
      "contactId": "003xx000004WhHQA0",
      "roles": "Decision Maker",
      "relations": [
        {
          "roleRelationId": "0z1xx0000000001AAA",
          "relatedContactId": "003xx000004WhJ2AAK",
          "startDate": "2023-06-14T00:00:00.000Z"
        }
      ]
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
acrId	String	ID of the Account Contact relationship.	The <code>acrId</code> property is required if an account ID is specified when defining a party relationship group.	58.0
contactId	String	ID of the Contact.	Required	58.0
customFields	Map<String, Object>	Custom fields associated with a party relationship group member.	Optional	58.0
dataRollupCategory	String	Category of the data roll-up summary field.	Optional	58.0
direct	Boolean	Indicates whether the member relationship is a direct relationship (<code>true</code>) or not (<code>false</code>).	Optional	58.0
endDate	Date	Date when the member relationship ends.	Optional	58.0
relations	Relationships Input	Details of the member record relationship.	Optional	58.0
roles	String	Role of the member in the party relationship group. For example, a decision maker role or a caregiver role.	Required	58.0
startDate	Date	Date when the member relationship starts.	Optional	58.0

Relationships Input

Input representation of the relationship among members of a party relationship group.

JSON example

```
"relations": [
  {
    "roleRelationId": "0z1RM0000004CAaYAM",
    "relatedContactId": "003RM00000895NfYAY",
    "startDate": "2023-06-14T00:00:00.000Z",
    "endDate": "2024-06-14T00:00:00.000Z",
    "isActive": true,
    "customFields": {
      "field1": "field1Value",
      "field2": "field1Value"
    }
  }
]
```

Properties

Name	Type	Description	Required or Optional	Available Version
ccrId	String	Record ID of the ContactContactRelationship object.	Optional	58.0
customFields	Map<String, Object>	Custom fields associated with the ContactRelationship object.	Optional	58.0
endDate	String	Date when the contact relationship ends.	Optional	58.0
hierarchyType	String	Hierarchy among the contacts that are related.	Optional	58.0
isActive	Boolean	Indicates whether the relationship is active (true) or not (false).	Optional	58.0
relatedContactId	String	Record ID of the RelatedContact object.	Required	58.0
relatedInverseRecordId	String	Record ID of the related inverse record.	Optional	58.0
roleRelationId	String	Record ID of the PartyRoleRelation object.	Required	58.0
startDate	String	Date when the contact relationship starts.	Optional	58.0

Response Bodies

The Group Membership and Households APIs have these response bodies.

[Group Definition](#)

Output representation of a party relationship group definition.

[Group Fields](#)

Output representation of the fields of the party relationship groups to be merged.

Group Related Entity

Output representation of the request to fetch the related records of a party relationship group.

Group Definition

Output representation of a party relationship group definition.

JSON example

```
{
  "accountId": "001RM000005mkcuYAA",
  "code": "200",
  "isSuccess": true,
  "message": "",
  "partyRelationshipId": "0wKRM00000000BT2AY"
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
accountId	String	Record ID of the Account object.	Small, 58.0	58.0
code	String	Error code with details of the error.	Small, 58.0	58.0
isSuccess	Boolean	Indicates whether the create request is successful (<code>true</code>) or not (<code>false</code>).	Small, 58.0	58.0
message	String	Message of the API request.	Small, 58.0	58.0
partyRelationshipId	String	Record ID of the PartyRelationshipGroup object.	Small, 58.0	58.0

Group Fields

Output representation of the fields of the party relationship groups to be merged.

JSON example

```
{
  "accountFields": [
    "field1",
    "field2",
    "field3",
    "customFields": [
      "customField1",
      "customField2"
    ]
  ],
  "prgFields": [
    "field1",
    "field2",
    "field3",
    "customFields": [
      "customField1",
      "customField2"
    ]
  ]
}
```

```

    ]
  ],
  "accId1":{
    "Account":{
      "name":"Account A",
      "shippingAddress":"",
      "customFields":{
        "customField1":"sample_customfield1",
        "customField2":"sample_customfield2"
      }
    },
    "PRG":{
      "name":"Smith Household",
      "category":"Staying under the same roof",
      "customFields":{
        "customField1":"sample_customfield3",
        "customField2":"sample_customfield4"
      }
    }
  },
  "accId2":{
    "Account":{
      "name":"Account B",
      "shippingAddress":"",
      "customFields":{
        "customField1":"sample_customfield5",
        "customField2":"sample_customfield6"
      }
    },
    "PRG":{
      "name":"Marshall Household",
      "category":"Staying under the same roof",
      "customFields":{
        "customField1":"sample_customfield7",
        "customField2":"sample_customfield8"
      }
    }
  }
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
accId1	Map<String, Object>	ID of the primary party relationship group.	Small, 58.0	58.0
accId2	Map<String, Object>	ID of the secondary party relationship group.	Small, 58.0	58.0
accountFields	Object[]	List of fields associated with the account.	Small, 58.0	58.0
prgFields	Object[]	List of fields associated with the party relationship group.	Small, 58.0	58.0

Group Related Entity

Output representation of the request to fetch the related records of a party relationship group.

JSON example

```
{
  "relatedEntities":{
    "Task":[
      "00Txx000003rIRU",
      "00Txx000003rIUi"
    ],
    "CaseParticipant":[
      "1caxx00000000BL"
    ],
    "ContentDocumentLink":[
      "06Axx0000004C93"
    ],
    "Case":[
      "500xx000000bod7",
      "500xx000000boej"
    ],
    "Contact":[
      "003xx000004Wi5Q"
    ],
    "PublicComplaint":[
      "0fhxx000000006T"
    ],
    "WorkOrder":[
      "0WOxx0000000001"
    ],
    "CarePlan":[
      "1spxx000000003F"
    ],
    "Opportunity":[
      "006xx000001a332",
      "006xx000001a34e",
      "006xx000001a36G"
    ],
    "Lead":[
      "00Qxx000002TRbO"
    ],
    "Entity1__c":[
      "a01xx000003GaSF"
    ],
    "Asset":[
      "02ixx0000004HHi"
    ],
    "Allegation__c":[
      "a00xx000000bobV"
    ],
    "Contract":[
      "800xx000000bohX"
    ]
  ]
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
relatedEntities	Map<String, String[]>	Map of the related objects and their record IDs. For example, case participants, tasks, cases, contacts, and public complaints.	Small, 58.0	58.0

CHAPTER 11 Record Rollup Definitions

In this chapter ...

- [Record Rollup Definitions Standard Objects](#)
- [Record Rollup Definitions Business APIs](#)
- [Record Rollup Definitions Metadata API Types](#)
- [Record Rollup Definitions Tooling API Objects](#)

Use Record Rollup Definitions to streamline the aggregation of records from various objects or groups. They also give a consolidated view of data so that your business executives can make accurate decisions swiftly and effortlessly.

SEE ALSO:

[Salesforce Help: Record Rollup Definitions](#)

[Salesforce Help: Record Rollup Definitions Basics](#)

Record Rollup Definitions Standard Objects

Use standard objects to manage record rollup definitions and data aggregation among records.

[RecordAggregationResult](#)

Represents a data aggregation from one record to another record based on the record aggregation definition for the corresponding objects. This object is available in API version 59.0 and later.

RecordAggregationResult

Represents a data aggregation from one record to another record based on the record aggregation definition for the corresponding objects. 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 the Record Aggregation permission set license, and you have the Record Aggregation Access permission.

Fields

Field	Details
<code>AggregateFromRecordId</code>	Type reference Properties Create, Filter, Group, Sort, Update Description The record from which data is aggregated. This field is a polymorphic relationship field. Relationship Name AggregateFromRecord Relationship Type Lookup
<code>AggregateToRecordId</code>	Type reference Properties Create, Filter, Group, Sort, Update

Field	Details
	Description The record to which data is aggregated. This field is a polymorphic relationship field. Relationship Name AggregateToRecord Relationship Type Lookup
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate is not null, the user accessed this record or list view indirectly.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description The name of the record aggregation result.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The ID of the owner of this object. This field is a polymorphic relationship field. Relationship Name Owner

Field	Details
	Relationship Type Lookup
	Refers To Group, User
RecordAggregationDefinitionId	Type reference
	Properties Create, Filter, Group, Sort, Update
	Description The record aggregation definition for the data aggregation from the aggregate-from record to the aggregate-to record. This field is a relationship field.
	Relationship Name RecordAggregationDefinition
	Relationship Type Lookup
	Refers To RecordAggregationDefinition

Associated Objects

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

RecordAggregationResultChangeEvent (API Version 63.0)
Change events are available for the object.

RecordAggregationResultOwnerSharingRule
Sharing rules are available for the object.

RecordAggregationResultShare
Sharing is available for the object.

Record Rollup Definitions Business APIs

Use the Record Rollup Definitions Business APIs to get a consolidated view of data for a specific record aggregation definition. You can sort data by name and arrange it in ascending or descending order.

Available Resources

Resource	Description
/connect/record-aggregation/record-aggregation-definition/record-rollup-results on page 706 (POST)	Get rollup results for a specific record aggregation definition. Sort the data by name and arrange it in ascending or descending order.
/connect/record-aggregation/dpe-generation on page 705 (POST)	Generate a Data Processing Engine (DPE) definition for the record aggregation definitions that you have configured. Run the DPE definition to aggregate records.

REST Reference

You can access Record Rollup Definitions Business APIs by using the REST endpoint that follows similar conventions as Connect REST APIs.

REST Reference

You can access Record Rollup Definitions Business APIs by using the REST endpoint that follows similar conventions as Connect REST APIs.

Resources

Learn more about the available resource of Record Rollup Definitions Business APIs.

Requests

Learn more about the available request body of Record Rollup Definitions Business APIs.

Responses

Learn more about the available response bodies of Record Rollup Definitions Business APIs.

SEE ALSO:

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

Resources

Learn more about the available resource of Record Rollup Definitions Business APIs.

Record Aggregation DPE Definition Generation (POST)

Generate a Data Processing Engine (DPE) definition for the record aggregation definitions that you have configured. Run the DPE definition to aggregate records.

Record Rollup Definitions (POST)

Get rollup results for a specific record aggregation definition. Sort the data by name and arrange it in ascending or descending order.

Record Aggregation DPE Definition Generation (POST)

Generate a Data Processing Engine (DPE) definition for the record aggregation definitions that you have configured. Run the DPE definition to aggregate records.

Generate a DPE definition for a record aggregation definition or for all the record aggregation definitions that you have configured.

After you generate a DPE definition, if you configure a new record aggregation definition, generate a DPE definition for all your record aggregation definitions. If you generate a DPE definition for only the new record aggregation definition, the request overwrites the definition that you generated before and doesn't append to it.

The DPE definition is generated subject to the Data Processing Engine limits.

Resource

```
/connect/record-aggregation/dpe-generation
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v66.0/connect/record-aggregation/dpe-generation
```

Available version

59.0

Requires Chatter

No

HTTP methods

POST

Request body for POST

JSON example

```
{
  "definitionId": "ALL"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
definitionId	String	ID of a record aggregation definition component. To generate a Data Processing Engine definition for all the active record aggregation definition components, specify ALL.	Required	59.0

Response body for POST

[Data Processing Engine Definition List Output](#)

SEE ALSO:

[Salesforce Help: Data Processing Engine Limits](#)

Record Rollup Definitions (POST)

Get rollup results for a specific record aggregation definition. Sort the data by name and arrange it in ascending or descending order.

Resource

```
/connect/record-aggregation/recordAggregationDefinitionId/record-rollup-results
```

The *recordAggregationDefinitionId* parameter is the ID of the record aggregation definition.

Resource example

```
https://yourInstance.salesforce.com/services/data/v66.0/connect/record-aggregation/16,0000001/record-rollup-results?anchorRecordId=10,0000001
```

Available version

61.0

HTTP methods

POST

Query parameters for POST

Parameter Name	Type	Description	Required or Optional	Available Version
anchorRecordId	String	ID of the record to which the aggregated records are rolled up.	Required	61.0

Request body for POST**JSON example**

```
{
  "sortBy": "Name",
  "isSortOrderAscending": true
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
isSortOrderAscending	Boolean	Indicates whether the sort order is ascending (true) or not (false). The default value is true.	Optional	61.0
sortBy	String	Criteria to sort the record aggregation results. The default value is CreatedDate.	Optional	61.0

Response body for POST

[Record Rollup Results](#)

Requests

Learn more about the available request body of Record Rollup Definitions Business APIs.

[Record Aggregation Definition Input](#)

Input representation of a Record Aggregation Data Processing Engine definition generation request.

[Record Rollup Result Input](#)

Input representation to sort and fetch the record rollup results.

Record Aggregation Definition Input

Input representation of a Record Aggregation Data Processing Engine definition generation request.

JSON example

```
{
  "definitionId": "ALL"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
definitionId	String	ID of a record aggregation definition component. To generate a Data Processing Engine definition for all the active record aggregation definition components, specify <code>ALL</code> .	Required	59.0

Record Rollup Result Input

Input representation to sort and fetch the record rollup results.

JSON example

```
{
  "sortBy": "Name",
  "isSortOrderAscending": true
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
isSortOrderAscending	Boolean	Indicates whether the sort order is ascending (<code>true</code>) or not (<code>false</code>). The default value is <code>true</code> .	Optional	61.0
sortBy	String	Criteria to sort the record aggregation results. The default value is <code>CreatedDate</code> .	Optional	61.0

Responses

Learn more about the available response bodies of Record Rollup Definitions Business APIs.

Refer to the [HTTP response code](#) to check whether the request was successful, as well as viewing the error messages for the failed requests.

[Data Processing Engine Definition List Output](#)

Output representation of a Record Aggregation Data Processing Engine definition generation request.

[Record Rollup Results](#)

Output representation of the record rollup results.

[Record Rollup Result Column](#)

Output representation of the consolidated view of the table column data.

[Record Rollup Result Last Updated Details](#)

Represents the last updated information of the record rollup results.

[Record Rollup Result Row](#)

Output representation of the consolidated view of the table row data.

Data Processing Engine Definition List Output

Output representation of a Record Aggregation Data Processing Engine definition generation request.

JSON example

```
{
  "code": "200",
  "dpeIds": [
    "9N1SB00000006IL0AY"
  ],
  "isSuccess": true,
  "message": "DPE Generated Successfully"
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
code	String	Status code of the request.	Small, 59.0	59.0
dpeIds	String[]	List of Data Processing Engine definition IDs.	Small, 59.0	59.0
isSuccess	Boolean	Indicates whether the Data Processing Engine definition is generated (<code>true</code>) or not (<code>false</code>).	Small, 59.0	59.0
message	String	Indicates whether the generation of the Data Processing Engine definition succeeded or failed.	Small, 59.0	59.0

Record Rollup Results

Output representation of the record rollup results.

JSON Example

```
{
  "columns": [
    {
      "fieldApiName": "Name",
      "displayFormatType": "text",
      "fieldLabel": "Name",
      "sequence": 0,
      "isRedirectionEnabled": true,
      "isSortable": true,
      "isTypeName": true,
      "sortByField": "Name"
    },
    {
      "fieldApiName": "BranchUnit",
      "displayFormatType": "reference",
      "fieldLabel": "Branch Unit",
      "sequence": 4,
      "isRedirectionEnabled": true,
      "isSortable": true,
      "isTypeName": false,
      "sortByField": "BranchUnit.Name"
    }
  ],
  "message": "Successful",
  "rows": [
    {
      "rowData": {
        "Status": "Active",
        "Type": "Savings",
        "Id": "0c7xx000000006TAAQ",
        "FinancialAccountNumber": "*****0001",
        "Name": "John Doe",
        "Case__c": {
          "Id": "Some ID",
          "CaseNumber": "000001"
        }
      }
    }
  ],
  "statusCode": "200",
  "totalResultCount": 1,
  "definitionDisplayName": "Savings Financial Account"
  "lastUpdatedDetails": {
    "errorType": "NOT_FOUND",
    "epochTime": 1733734423000,
    "processingMode": "Batch"
  }
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
columns	Record Rollup Result Column[]	List of fields that represent the columns of a table.	Small, 61.0	61.0
definition DisplayName	String	Name of the record aggregation definition.	Small, 61.0	61.0
message	String	Message for the HTTP response code.	Small, 61.0	61.0
lastUpdated Details	Record Rollup Result Last Updated Details[]	The information about the last time the record rollup results were updated for the specified definition and anchor record ID.	Small, 64.0	64.0
rows	Record Rollup Result Row[]	List of aggregated records that represent the rows of a table.	Small, 61.0	61.0
statusCode	String	HTTP response code for the request.	Small, 61.0	61.0
totalResult Count	Integer	Total number of record aggregation results.	Small, 61.0	61.0

Record Rollup Result Column

Output representation of the consolidated view of the table column data.

JSON Example

```
"columns": [
  {
    "fieldApiName": "Name",
    "displayFormatType": "text",
    "fieldLabel": "Name",
    "sequence": 0,
    "isRedirectionEnabled": true,
    "isSortable": true,
    "isTypeName": true,
    "sortByField": "Name"
  }
]
```

Property Name	Type	Description	Filter Group and Version	Available Version
displayFormat Type	String	Data type of the field that represents the column. This data type corresponds to the type recognized by the Lightning data table.	Small, 61.0	61.0
fieldApiName	String	API name of the field that represents the column of the table.	Small, 61.0	61.0
fieldLabel	String	Name of the field that represents the column of the table.	Small, 61.0	61.0

Property Name	Type	Description	Filter Group and Version	Available Version
isRedirection Enabled	Boolean	Indicates whether clicking the column label redirects to the relevant record details page (<code>true</code>) or not (<code>false</code>). The value is <code>true</code> if <code>fieldApiName</code> is <code>Name</code> or if <code>displayFormatType</code> is <code>reference</code> , which is a Lookup relation in Salesforce.	Small, 61.0	61.0
sequence	Integer	Sequence in which the column appears in the data table.	Small, 61.0	61.0
isSortable	Boolean	Indicates whether the column is sortable (<code>true</code>) or not (<code>false</code>).	Small, 61.0	61.0
isTypeName	Boolean	Indicates whether the field is of type <code>Name</code> (<code>true</code>) or not (<code>false</code>).	Small, 61.0	61.0
sortByField	String	Represents the field that's used to sort the table.	Small, 61.0	61.0

Record Rollup Result Last Updated Details

Represents the last updated information of the record rollup results.

JSON Example

```
{
  "lastUpdatedDetails": {
    "errorType": "NOT_FOUND",
    "epochTime": 1733734423000,
    "processingMode": "Batch"
  }
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
epochTime	Long	The epoch timestamp in milliseconds when the record rollup results were last updated for the specified definition and anchor record ID.	Small, 64.0	64.0
errorType	String	Type of error encountered while fetching the last updated record rollup definition details.	Small, 64.0	64.0
processingMode	String	The record rollup mode used to generate the last updated details. Valid Values are: - Batch - On-Demand	Small, 64.0	64.0

Record Rollup Result Row

Output representation of the consolidated view of the table row data.

JSON Example

```
"rows": [  
  {  
    "rowData": {  
      "Status": "Active",  
      "Type": "Savings",  
      "Id": "0c7xx000000006TAAQ",  
      "FinancialAccountNumber": "*****0001",  
      "Name": "John Doe",  
      "Case__c": {  
        "Id": "Some ID",  
        "CaseNumber": "000001"  
      }  
    }  
  }  
]
```

Property Name	Type	Description	Filter Group and Version	Available Version
rowData	Map<String, Object>	Map of key-value pairs, where key represents the field API name and value represents the field value.	Small, 61.0	61.0

Record Rollup Definitions Metadata API Types

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

[RecordAggregationDefinition](#)

Represents a data aggregation from one object to another object to which it is connected by other objects in the data model.

SEE ALSO:

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

RecordAggregationDefinition

Represents a data aggregation from one object to another object to which it is connected by other objects in the data model.

 **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

RecordAggregationDefinition components have the suffix `.RecordAggregationDefinition` and are stored in the `RecordAggregationDefinitions` folder.

Version

RecordAggregationDefinition components are available in API version 59.0 and later.

Special Access Rules

To access the RecordAggregationDefinition metadata type, you must have the Record Aggregation permission set license and the Record Aggregation Access permission.

Fields

Field Name	Description
<code>aggregateFromObject</code>	Field Type string Description Required. API name of the object from which data is aggregated.
<code>aggregateToObject</code>	Field Type string Description Required. API name of the object to which data is aggregated.
<code>aggregationType</code>	Field Type RecordAggregationDefinitionAggregationType (enumeration of type string) Description Required. Type of the data aggregation. Valid value is: • Record
<code>batchProcessingDefinition</code>	Field Type string Description Data Processing Engine definition that aggregates data from one record to another.

Field Name	Description
description	Field Type string Description Description for this record aggregation definition.
displayName	Field Type string Description Required. Name of the record aggregation definition that's displayed in the record page.
onDemandProcDefinition	Field Type string Description Data Processing Engine definition that aggregates data from one record to another on demand. Available in API version 63.0 and later.
recordAggregationObject	Field Type RecordAggregationObject[] Description List of record aggregation objects in the record aggregation join sequence.
status	Field Type RecordAggregationDefinitionStatus (enumeration of type string) Description Required. Status of this record aggregation definition. Values are: • Active • Draft • Inactive

RecordAggregationObject

Represents an object in the record aggregation join sequence.

Field Name	Description
associatedObject	Field Type string

Field Name	Description
	Description Required. API name of the object associated with this record aggregation object.
developerName	Field Type string Description Developer name of the record aggregation object. May contain only underscores and alphanumeric characters and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.
filterLogic	Field Type string Description Logical sequence in which the record aggregation object filters associated with this record aggregation object are applied to the associated object's records. If you define two or more record aggregation object filters, but don't specify the sequence in which to apply the filters, the filters are applied by using a logical AND expression. Available in API version 60.0 and later.
masterLabel	Field Type string Description Required. A user-friendly name for RecordAggregationDefinition, which is defined when the RecordAggregationDefinition is created.
recordAggregationJoinCondition	Field Type RecordAggregationJoinCondition[] Description List of join conditions that apply to this record aggregation object.
recordAggregationObjectFilter	Field Type RecordAggregationObjectFilter[] Description List of filters that are applied to the records of this record aggregation object. Available in API version 60.0 and later.

RecordAggregationJoinCondition

Represents a condition in a join between two record aggregation objects.

Field Name	Description
joinField	Field Type string Description Required. API name of the field on the record aggregation object's associated object that is used in the join condition.
navigationSequenceNumber	Field Type int Description Required. Sequence number corresponding to this join in the join sequence from the object to which the data is aggregated to the object that contains the data being aggregated.
relatedJoinField	Field Type string Description Required. API name of the field on the related record aggregation object's associated object that is used in the join condition.
relatedRecordAggregationObject	Field Type string Description Required. Second record aggregation object in the join condition.
type	Field Type RecordAggregationJoinConditionType (enumeration of type string) Description Required. Type of this record aggregation join in the join path from the object to which the data is aggregated to the object that contains the data being aggregated. Valid values are: • AggregateFrom • AggregateTo • Intermediate

RecordAggregationObjectFilter

Represents a filter that is applied to the records of an object in the record aggregation join sequence. Available in API version 60.0 and later.

Field Name	Description
associatedObjectField	Field Type string Description Required. API name of the associated object's field whose value is used to filter the object's records. The associated object is specified in the record aggregation object.
operator	Field Type RecordAggregationObjectFilterOperator (enumeration of type string) Description Required. Operator used in the filter expression. Values are: • Contains • Equals • GreaterThan • GreaterThanOrEquals • In • LessThan • LessThanOrEquals • NotEquals • NotIn
sequenceNumber	Field Type int Description Required. Sequence number of this record aggregation object filter.
value	Field Type string Description Required. Reference value with which the designated field's values are compared when the filter is applied on the associated object's records.

Declarative Metadata Sample Definition

The following is an example of a RecordAggregationDefinition component.

```
<?xml version="1.0" encoding="UTF-8"?>
<RecordAggregationDefinition xmlns="http://soap.sforce.com/2006/04/metadata">
  <aggregateToObject>PartyRelationshipGroup</aggregateToObject>
  <aggregateFromObject>PartyIncome</aggregateFromObject>
  <status>Active</status>
  <aggregationType>Record</aggregationType>
  <description>Aggregate head of household's income to household</description>
  <displayName>Party Income to Party Relationship Group</displayName>
  <recordAggregationObject>
    <associatedObject>PartyRelationshipGroup</associatedObject>
    <masterLabel>Party Relationship Group Object</masterLabel>
    <developerName>PartyRelationshipGroupObject</developerName>
    <recordAggregationJoinCondition>
      <joinField>Account</joinField>
      <navigationSequenceNumber>1</navigationSequenceNumber>
      <relatedJoinField>Account</relatedJoinField>
    </recordAggregationJoinCondition>
  </recordAggregationObject>
  <relatedRecordAggregationObject>AccountContactrelationObject</relatedRecordAggregationObject>

    <type>Intermediate</type>
  </recordAggregationJoinCondition>
  <recordAggregationObjectFilter>
    <associatedObjectField>Type</associatedObjectField>
    <operator>Equals</operator>
    <value>Household</value>
    <sequenceNumber>1</sequenceNumber>
  </recordAggregationObjectFilter>
</recordAggregationObject>
<recordAggregationObject>
  <associatedObject>AccountContactRelation</associatedObject>
  <masterLabel>Account Contact Relation Object</masterLabel>
  <developerName>AccountContactRelationObject</developerName>
  <recordAggregationJoinCondition>
    <joinField>Contact</joinField>
    <navigationSequenceNumber>2</navigationSequenceNumber>
    <relatedJoinField>Party</relatedJoinField>
  </recordAggregationJoinCondition>
</recordAggregationObject>
<recordAggregationObject>PartyIncomeObject</relatedRecordAggregationObject>
  <type>Intermediate</type>
</recordAggregationJoinCondition>
<recordAggregationObjectFilter>
  <associatedObjectField>IsPrimaryMember</associatedObjectField>
  <operator>Equals</operator>
  <value>true</value>
  <sequenceNumber>1</sequenceNumber>
</recordAggregationObjectFilter>
</recordAggregationObject>
<recordAggregationObject>
  <associatedObject>PartyIncome</associatedObject>
  <masterLabel>Party Income Object</masterLabel>
  <developerName>PartyIncomeObject</developerName>
</recordAggregationObject>
```

```

    <filterLogic>1 AND 2</filterLogic>
    <recordAggregationObjectFilter>
      <associatedObjectField>IncomeFrequency</associatedObjectField>
      <operator>Equals</operator>
      <value>Monthly</value>
      <sequenceNumber>1</sequenceNumber>
    </recordAggregationObjectFilter>
    <recordAggregationObjectFilter>
      <associatedObjectField>IncomeStatus</associatedObjectField>
      <operator>Equals</operator>
      <value>Active</value>
      <sequenceNumber>2</sequenceNumber>
    </recordAggregationObjectFilter>
  </recordAggregationObject>
</RecordAggregationDefinition>

```

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>RecordAggregationDefinition</name>
  </types>
  <version>60.0</version>
</Package>

```

Wildcard Support in the Manifest File

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

Record Rollup Definitions 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.

[RecordAggregationDefinition](#)

Represents a data aggregation from one object to another object to which it is connected by other objects in the data model. This object is available in API version 59.0 and later.

[RecordAggregationJoinCondition](#)

Represents a condition in a join between two record aggregation objects. This object is available in API version 59.0 and later.

[RecordAggregationObject](#)

Represents an object in the record aggregation join sequence. This object is available in API version 59.0 and later.

[RecordAggregationObjectFilter](#)

Represents a filter that is applied to the records of an object in the record aggregation join sequence. This object is available in API version 60.0 and later.

SEE ALSO:

[Developer Guide: Introducing Tooling API](#)

RecordAggregationDefinition

Represents a data aggregation from one object to another object to which it is connected by other objects in the data model. This object is available in API version 59.0 and later.

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

Supported SOAP API Calls

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

Supported REST API Methods

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

Special Access Rules

To access this object, you must have the Record Aggregation permission set license and the Record Aggregation Access permission.

Fields

Field	Details
AggregateFromObject	Type picklist Properties Filter, Group, Restricted picklist, Sort Description Required. API name of the object from which data is aggregated.
AggregateToObject	Type picklist Properties Filter, Group, Restricted picklist, Sort Description Required.

Field	Details
	API name of the object to which data is aggregated.
AggregationType	Type picklist Properties Filter, Group, Restricted picklist, Sort Description Required. Type of the data aggregation. Possible value is: Record
BatchProcessingDefinitionId	Type reference Properties Filter, Group, Nillable, Sort Description Data Processing Engine definition that aggregates data from one record to another. This field is a relationship field. Relationship Name BatchProcessingDefinition Relationship Type Lookup Refers To BatchCalcJobDefinition
Description	Type textarea Properties Filter, Group, Nillable, Sort Description The description for this record aggregation definition.
DeveloperName	Type string Properties Filter, Group, Sort Description Unique name for the RecordAggregationDefinition object.

Field	Details
	The unique name of the object in the API. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization. Label is Record Type Name. This field is automatically generated, but you can supply your own value if you create the record using the API.
DisplayName	Type string Properties Filter, Group, idLookup, Sort Description Required. The name of the record aggregation definition that's displayed in the record page.
FullName	Type string Properties Create, Group, Nillable Description The full name of the associated RecordAggregationDefinition type in Metadata API. Query this field only if the query result contains no more than one record. Otherwise, an error is returned. If more than one record exists, use multiple queries to retrieve the records. This limit protects performance.
Language	Type picklist Properties Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort Description The language of the record aggregation definition. Possible values are: • <code>da</code>—Danish • <code>de</code>—German • <code>en_US</code>—English • <code>es</code>—Spanish • <code>es_MX</code>—Spanish (Mexico) • <code>fi</code>—Finnish • <code>fr</code>—French

Field	Details
	• <code>it</code>—Italian • <code>ja</code>—Japanese • <code>ko</code>—Korean • <code>nl_NL</code>—Dutch • <code>no</code>—Norwegian • <code>pt_BR</code>—Portuguese (Brazil) • <code>ru</code>—Russian • <code>sv</code>—Swedish • <code>th</code>—Thai • <code>zh_CN</code>—Chinese (Simplified) • <code>zh_TW</code>—Chinese (Traditional)
MasterLabel	Type string Properties Filter, Group, Sort Description Label for the record aggregation definition.
Metadata	Type RecordAggregationDefinition Properties Create, Nillable, Update Description The RecordAggregationDefinition's metadata.
Status	Type picklist Properties Defaulted on create, Filter, Group, Restricted picklist, Sort Description The status of the record aggregation definition. Possible values are: • Active • Draft • Inactive The default value is <code>Draft</code>.

RecordAggregationJoinCondition

Represents a condition in a join between two record aggregation objects. This object is available in API version 59.0 and later.

Supported SOAP API Calls

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

Supported REST API Methods

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

Special Access Rules

To access this object, you must have the Record Aggregation permission set license and the Record Aggregation Access permission.

Fields

Field	Details
JoinField	Type picklist Properties Create, Filter, Group, Restricted picklist, Sort, Update Description The API name of the field on the record aggregation object's associated object that is used in the join condition.
NavigationSequenceNumber	Type int Properties Create, Filter, Group, Sort, Update Description The sequence number corresponding to this join in the join sequence from the object to which the data is aggregated to the object that contains the data being aggregated.
RecordAggregationObjectId	Type reference Properties Create, Filter, Group, Sort Description The record aggregation object with which this record aggregation join condition is associated. This field is a relationship field. Relationship Name RecordAggregationObject

Field	Details
	Relationship Type Lookup Refers To RecordAggregationObject
RelatedJoinField	Type picklist Properties Create, Filter, Group, Restricted picklist, Sort, Update Description The API name of the field on the related record aggregation object's associated object that is used in the join condition.
RelatedRecordAggrObjectId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The second record aggregation object in the join condition. This field is a relationship field. Relationship Name RelatedRecordAggrObject Relationship Type Lookup Refers To RecordAggregationObject
Type	Type picklist Properties Create, Filter, Group, Restricted picklist, Sort, Update Description The type of this record aggregation join in the join path from the object to which the data is aggregated to the object that contains the data being aggregated. Possible values are: - AggregateFrom - AggregateTo - Intermediate

RecordAggregationObject

Represents an object in the record aggregation join sequence. This object is available in API version 59.0 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()`, `describeObjects()`, `query()`, `retrieve()`, `update()`, `upsert()`

Supported REST API Methods

DELETE, GET, HEAD, PATCH, POST, Query

Special Access Rules

To access this object, you must have the Record Aggregation permission set license and the Record Aggregation Access permission.

Fields

Field	Details
AssociatedObject	Type picklist Properties Create, Filter, Group, Restricted picklist, Sort, Update Description The API name of the object associated with this record aggregation object.
DeveloperName	Type string Properties Create, Filter, Group, Sort, Update Description The developer name of the record aggregation object. Can contain only underscores and alphanumeric characters and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.
FilterLogic	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description Logical sequence in which the record aggregation object filters associated with this record aggregation object are applied to the associated object's records. If you define two or more

Field	Details
	record aggregation object filters, but don't specify the sequence in which to apply the filters, the filters are applied by using a logical AND expression. Available in API version 60.0 and later.
Language	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The language of the record aggregation object. Possible values are: • da—Danish • de—German • en_US—English • es—Spanish • es_MX—Spanish (Mexico) • fi—Finnish • fr—French • it—Italian • ja—Japanese • ko—Korean • nl_NL—Dutch • no—Norwegian • pt_BR—Portuguese (Brazil) • ru—Russian • sv—Swedish • th—Thai • zh_CN—Chinese (Simplified) • zh_TW—Chinese (Traditional)
MasterLabel	Type string Properties Create, Filter, Group, Sort, Update Description Label for the record aggregation object.
RecordAggregationDefinitionId	Type reference

Field	Details
	Properties Create, Filter, Group, Sort
	Description The record aggregation definition with which this record aggregation object is associated. This field is a relationship field.
	Relationship Name RecordAggregationDefinition
	Relationship Type Lookup
	Refers To RecordAggregationDefinition

RecordAggregationObjectFilter

Represents a filter that is applied to the records of an object in the record aggregation join sequence. This object is available in API version 60.0 and later.

Supported SOAP API Calls

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

Supported REST API Methods

DELETE, GET, HEAD, PATCH, POST, Query

Special Access Rules

To access this object, you must have the Record Aggregation permission set license and the Record Aggregation Access permission.

Fields

Field	Details
AssociatedObjectField	Type picklist
	Properties Create, Filter, Group, Restricted picklist, Sort, Update
	Description API name of the associated object's field whose value is used to filter the object's records. The associated object is specified in the record aggregation object.

Field	Details
Operator	Type picklist Properties Create, Filter, Group, Restricted picklist, Sort, Update Description Operator used in the filter expression. Possible values are: - Contains - Equals - GreaterThan - GreaterThanOrEquals - In - LessThan - LessThanOrEquals - NotEquals - NotIn
RecordAggregationObjectId	Type reference Properties Create, Filter, Group, Sort Description The record aggregation object with which this record aggregation object filter is associated. This field is a relationship field. Relationship Name RecordAggregationObject Relationship Type Lookup Refers To RecordAggregationObject
SequenceNumber	Type int Properties Create, Filter, Group, Sort, Update Description Sequence number of this record aggregation object filter.
Value	Type string

Field	Details
	Properties Create, Filter, Group, Sort, Update Description Reference value with which the designated field's values are compared when the filter is applied on the associated object's records.

CHAPTER 12 NonProfit Cloud Associated Objects

In this chapter ...

- [StandardObjectNameShare](#)
- [StandardObjectNameOwnershipRule](#)
- [StandardObjectNameHistory](#)
- [StandardObjectNameChangeEvent](#)
- [StandardObjectNameFeed](#)

This section provides a list of objects associated to Nonprofit Cloud standard objects with their standard fields.

Some fields may not be listed for some objects. To see the system fields for each object, see [System Fields](#) in the *Object Reference for Salesforce and Lightning Platform*.

To verify the complete list of fields for an object, use a describe call from the API or inspect with an appropriate tool. For example, inspect the WSDL or use a schema viewer.

StandardObjectNameShare

StandardObjectNameShare is the model for all share objects associated with standard objects. These objects represent a sharing entry on the standard object.

The object name is variable and uses *StandardObjectNameShare* syntax. For example, AccountBrandShare is a sharing entry on an account brand. We list the available associated share objects at the end of this topic. For specific version information, see the standard object documentation.

Supported Calls

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

Special Access Rules

For specific special access rules, if any, see the documentation for the standard object. For example, for AccountBrandShare, see the special access rules for AccountBrand.

Fields

Field Name	Details
AccessLevel	Type picklist Properties Create, Filter, Group, Restricted picklist, Sort, Update Description The level of access allowed. Values are: • All (owner) • Edit (read/write) • Read (read only)
ParentId	Type reference Properties Create, Filter, Group, Sort Description ID of the parent record.
RowCause	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort

Field Name	Details
	Description Reason that the sharing entry exists.
UserOrGroupId	Type reference
	Properties Create, Filter, Group, Sort
	Description ID of the user or group that has been given access to the object.

StandardObjectNameOwnerSharingRule

StandardObjectNameOwnerSharingRule is the model for all owner sharing rule objects associated with standard objects. These objects represent a rule for sharing a standard object with users other than the owner.

The object name is variable and uses *StandardObjectNameOwnerSharingRule* syntax. For example, *ChannelProgramOwnerSharingRule* is a rule for sharing a channel program with users other than the channel program owner. We list the available associated owner sharing rule objects at the end of this topic. For specific version information, see the standard object documentation.

 **Note:** To enable access to this object, contact Salesforce customer support. But we recommend that you use Metadata API to programmatically update owner sharing rules instead because it triggers automatic sharing rule recalculation. The [SharingRules](#) Metadata API type is enabled for all orgs.

Supported Calls

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

Special Access Rules

For specific special access rules, if any, see the documentation for the standard object. For example, for *ChannelProgramOwnerSharingRule*, see the special access rules for *ChannelProgram*.

Fields

Field Name	Details
AccessLevel	Type picklist
	Properties Create, Filter, Group, Restricted picklist, Sort, Update

Field Name	Details
	Description Determines the level of access users have to records. Values are: • Read (read only) • Edit (read/write)
Description	Type textarea Properties Create, Filter, Nillable, Sort, Update Description Description of the sharing rule. Maximum length is 1000 characters.
DeveloperName	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The unique name of the object in the API. This name can contain only underscores and alphanumeric characters and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package, and the changes are reflected in a subscriber's organization.  Note: When creating large sets of data, always specify a unique DeveloperName for each record. If no DeveloperName is specified, performance can slow while Salesforce generates one for each record.
GroupId	Type reference Properties Create, Filter, Group, Sort Description ID of the source group. Records that are owned by users in the source group trigger the rule to give access.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description Label of the sharing rule as it appears in the UI. Maximum length is 80 characters.

Field Name	Details
UserOrGroupId	Type reference
	Properties Create, Filter, Group, Sort
	Description ID of the user or group that you are granting access to.

StandardObjectNameHistory

StandardObjectNameHistory is the model for all history objects associated with standard objects. These objects represent the history of changes to the values in the fields of a standard object.

The object name is variable and uses *StandardObjectNameHistory* syntax. For example, AccountHistory represents the history of changes to the values of an account record's fields. We list the available associated history objects at the end of this topic. For specific version information, see the documentation for the standard object.

Supported Calls

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

Special Access Rules

For specific special access rules, if any, see the documentation for the standard object. For example, for AccountHistory, see the special access rules for Account.

Fields

Field Name	Details
<i>StandardObjectNameId</i>	Type reference
	Properties Filter, Group, Sort
	Description ID of the standard object.
DataType	Type picklist
	Properties Filter, Group, Nillable, Restricted picklist, Sort
	Description Data type of the field that was changed.

Field Name	Details
Field	Type picklist Properties Filter, Group, Restricted picklist, Sort Description Name of the field that was changed.
NewValue	Type anyType Properties Nillable, Sort Description New value of the field that was changed.
OldValue	Type anyType Properties Nillable, Sort Description Old value of the field that was changed.

StandardObjectNameChangeEvent

A ChangeEvent object is available for each object that supports Change Data Capture. You can subscribe to a stream of change events using Change Data Capture to receive data tied to record changes in Salesforce. Changes include record creation, updates to an existing record, deletion of a record, and undeletion of a record. A change event isn't a Salesforce object—it doesn't support CRUD operations or queries. It's included in the object reference so you can discover which Salesforce objects support change events.

Supported Calls

`describeSObjects()`

Special Access Rules

- Not all objects may be available in your org. Some objects require specific feature settings and permissions to be enabled.
- For more special access rules, if any, see the documentation for the standard object. For example, for AccountChangeEvent, see the special access rules for Account.

Change Event Name

Change events are available for all custom objects and a subset of standard objects. The name of a change event is based on the name of the corresponding object for which it captures the changes.

Standard Object Change Event Name

```
<Standard_Object_Name>ChangeEvent
```

Example: AccountChangeEvent

Custom Object Change Event Name

```
<Custom_Object_Name>__ChangeEvent
```

Example: MyCustomObject__ChangeEvent

Change Event Fields

The fields that a change event can include correspond to the fields on the associated parent Salesforce object, with a few exceptions. For example, AccountChangeEvent fields correspond to the fields on Account.

The fields that a change event doesn't include are:

- The `IsDeleted` system field.
- The `SystemModStamp` system field.
- Any field whose value isn't on the record and is derived from another record or from a formula, except roll-up summary fields, which are included. Examples are formula fields. Examples of fields with derived values include `LastActivityDate` and `PhotoUrl`.

Each change event also contains header fields. The header fields are included inside the `ChangeEventHeader` field. They contain information about the event, such as whether the change was an update or delete and the name of the object, like Account.

In addition to the event payload, the event schema ID is included in the `schema` field. Also included is the event-specific field, `replayId`, which is used for retrieving past events.

Event Message Example

The following example is an event message in JSON format for a new account record creation.

```
{
  "schema": "IeRuaY6cbI_HsV8Rv1Mc5g",
  "payload": {
    "ChangeEventHeader": {
      "entityName": "Account",
      "recordIds": [
        "<record_ID>"
      ],
      "changeType": "CREATE",
      "changeOrigin": "com/salesforce/api/soap/51.0;client=SfdcInternalAPI/",
      "transactionKey": "0002343d-9d90-e395-ed20-cf416ba652ad",
      "sequenceNumber": 1,
      "commitTimestamp": 1612912679000,
      "commitNumber": 10716283339728,
      "commitUser": "<User_ID>"
    },
    "Name": "Acme",
```

```

    "Description": "Everyone is talking about the cloud. But what does it mean?",
    "OwnerId": "<Owner_ID>",
    "CreatedDate": "2021-02-09T23:17:59Z",
    "CreatedById": "<User_ID>",
    "LastModifiedDate": "2021-02-09T23:17:59Z",
    "LastModifiedById": "<User_ID>"
  },
  "event": {
    "replayId": 6
  }
}

```

API Version and Schema

When you subscribe to change events, the subscription uses the latest API version and the event messages received reflect the latest field definitions. For more information, see [API Version and Event Schema](#) in the *Change Data Capture Developer Guide*.

Usage

For more information about Change Data Capture, see [Change Data Capture Developer Guide](#).

Objects That Support Change Events

These objects have associated ChangeEvent objects.

- GiftCommitment
- GiftCommitmentSchedule
- GiftSoftCredit
- GiftTransaction
- GiftRefund
- GiftTransactionDesignation
- JobPositionAssignment
- JobPositionQualification
- JobPositionShift
- OutreachSourceCode
- PersonLocationAvailability
- PositionBenefit
- PositionQualification
- VolunteerInitiative

StandardObjectNameFeed

StandardObjectNameFeed is the model for all feed objects associated with standard objects. These objects represent the posts and feed-tracked changes of a standard object.

The object name is variable and uses *StandardObjectNameFeed* syntax. For example, AccountFeed represents the posts and feed-tracked changes on an account record. We list the available associated feed objects at the end of this topic. For specific version information, see the documentation for the standard object.

Supported Calls

`delete()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`

Special Access Rules

In the internal org, users can delete all feed items they created. This rule varies in communities where threaded discussions and delete-blocking are enabled. Community members can delete all feed items they created, provided the feed items don't have content nested under them—like a comment, answer, or reply. Where the feed item has nested content, only feed moderators and users with the Modify All Data permission can delete threads.

To delete feed items they didn't create, users must have one of these permissions:

- Modify All Data
- Modify All Records on the parent object, like Account for AccountFeed
- Moderate Chatter



Note: Users with the Moderate Chatter permission can delete only the feed items and comments they can see.

Only users with this permission can delete items in unlisted groups.

For more special access rules, if any, see the documentation for the standard object. For example, for AccountFeed, see the special access rules for Account.

Fields

Field	Details
BestCommentId	Type reference Properties Filter, Group, Nillable, Sort Description The ID of the comment marked as best answer on a question post.
Body	Type textarea Properties Nillable, Sort Description The body of the post. Required when <code>Type</code> is <code>TextPost</code> . Optional when <code>Type</code> is <code>ContentPost</code> or <code>LinkPost</code> .

Field	Details
CommentCount	Type int Properties Filter, Group, Sort Description The number of comments associated with this feed item.
ConnectionId	Type reference Properties Filter, Group, Nillable, Sort Description When a PartnerNetworkConnection modifies a record that is tracked, the CreatedBy field contains the ID of the system administrator. The ConnectionId contains the ID of the PartnerNetworkConnection. Available if Salesforce to Salesforce is enabled for your organization.
InsertedById	Type reference Properties Group, Nillable, Sort Description ID of the user who added this item to the feed. For example, if an application migrates posts and comments from another application into a feed, the InsertedBy value is set to the ID of the context user.
isRichText	Type boolean Properties Defaulted on create, Filter, Group, Sort Description Indicates whether the feed item Body contains rich text. If you post a rich text feed comment using SOAP API, set IsRichText to true and escape HTML entities from the body. Otherwise, the post is rendered as plain text. Rich text supports the following HTML tags: • <p> •  Tip: Though the
 tag isn't supported, you can use <p>&nbsp;</p> to create lines. • <a> • • <code>

Field	Details
	• <code><i></code> • <code><u></code> • <code><s></code> • <code></code> • <code></code> • <code></code> • <code></code> The <code></code> tag is accessible only through the API and must reference files in Salesforce similar to this example: <code></code>
LikeCount	Type int Properties Filter, Group, Sort Description The number of likes associated with this feed item.
LinkUrl	Type url Properties Nillable, Sort Description The URL of a <code>LinkPost</code>.
NetworkScope	Type picklist Properties Group, Nillable, Restricted picklist, Sort Description Specifies whether this feed item is available in the default Experience Cloud site, a specific Experience Cloud site, or all sites. This field is available in API version 26.0 and later, if digital experiences is enabled for your org. <code>NetworkScope</code> can have the following values: • <code>NetworkId</code>—The ID of the Experience Cloud site in which the <code>FeedItem</code> is available. If left empty, the feed item is only available in the default Experience Cloud site. • <code>AllNetworks</code>—The feed item is available in all Experience Cloud sites. Note the following exceptions for <code>NetworkScope</code>: • Only feed items with a Group or User parent can set a <code>NetworkId</code> or a null value for <code>NetworkScope</code>.

Field	Details
	- For feed items with a record parent, users can set <code>NetworkScope</code> only to <code>AllNetworks</code>. - You can't filter a feed item on the <code>NetworkScope</code> field.
ParentId	Type reference Properties Filter, Group, Sort Description ID of the record that is tracked in the feed. The detail page for the record displays the feed.
RelatedRecordId	Type reference Properties Group, Nillable, Sort Description ID of the ContentVersion record associated with a ContentPost. This field is null for all posts except ContentPost.
Title	Type string Properties Group, Nillable, Sort Description The title of the feed item. When the <code>Type</code> is <code>LinkPost</code>, the <code>LinkUrl</code> is the URL and this field is the link name.
Type	Type picklist Properties Filter, Group, Nillable, Restricted picklist, Sort Description The type of feed item: ActivityEvent—indirectly generated event when a user or the API adds a Task associated with a feed-enabled parent record (excluding email tasks on cases). Also occurs when a user or the API adds or updates a Task or Event associated with a case record (excluding email and call logging). For a recurring Task with CaseFeed disabled, one event is generated for the series only. For a recurring Task with CaseFeed enabled, events are generated for the series and each occurrence. AdvancedTextPost—created when a user posts a group announcement and, in Lightning Experience as of API version 39.0 and later, when a user shares a post.

Field	Details
	• <code>AnnouncementPost</code>—Not used. • <code>ApprovalPost</code>—generated when a user submits an approval. • <code>BasicTemplateFeedItem</code>—Not used. • <code>CanvasPost</code>—a post made by a canvas app posted on a feed. • <code>CollaborationGroupCreated</code>—generated when a user creates a public group. • <code>CollaborationGroupUnarchived</code>—Not used. • <code>ContentPost</code>—a post with an attached file. • <code>CreatedRecordEvent</code>—generated when a user creates a record from the publisher. • <code>DashboardComponentAlert</code>—generated when a dashboard metric or gauge exceeds a user-defined threshold. • <code>DashboardComponentSnapshot</code>—created when a user posts a dashboard snapshot on a feed. • <code>LinkPost</code>—a post with an attached URL. • <code>PollPost</code>—a poll posted on a feed. • <code>ProfileSkillPost</code>—generated when a skill is added to a user's Chatter profile. • <code>QuestionPost</code>—generated when a user posts a question. • <code>ReplyPost</code>—generated when Chatter Answers posts a reply. • <code>RypplePost</code>—generated when a user creates a Thanks badge in WDC. • <code>TextPost</code>—a direct text entry on a feed. • <code>TrackedChange</code>—a change or group of changes to a tracked field. • <code>UserStatus</code>—automatically generated when a user adds a post. Deprecated. The following values appear in the <code>Type</code> picklist for all feed objects but apply only to <code>CaseFeed</code>: • <code>CaseCommentPost</code>—generated event when a user adds a case comment for a case object • <code>EmailMessageEvent</code>—generated event when an email related to a case object is sent or received • <code>CallLogPost</code>—generated event when a user logs a call for a case through the user interface. CTI calls also generate this event. • <code>ChangeStatusPost</code>—generated event when a user changes the status of a case • <code>AttachArticleEvent</code>—generated event when a user attaches an article to a case  Note: If you set <code>Type</code> to <code>ContentPost</code>, also specify <code>ContentData</code> and <code>ContentFileName</code>.
Visibility	Type picklist Properties Filter, Group, Nillable, Restricted picklist, Sort

Field	Details
	Description Specifies whether this feed item is available to all users or internal users only. This field is available if Salesforce Communities are enabled for your organization. <code>Visibility</code> can have the following values: • <code>AllUsers</code>—The feed item is available to all users who have permission to see the feed item. • <code>InternalUsers</code>—The feed item is available to internal users only. Note the following exceptions for <code>Visibility</code>: • For record posts, <code>Visibility</code> is set to <code>InternalUsers</code> for all internal users by default. • External users can set <code>Visibility</code> only to <code>AllUsers</code>. • On user and group posts, only internal users can set <code>Visibility</code> to <code>InternalUsers</code>.

Usage

A feed for an object is automatically created when a user enables feed tracking for the object. Use feeds to track changes to records. For example, `AccountFeed` tracks changes to an account record. Use feed objects to retrieve the content of feed fields, such as type of feed or feed ID.

Note the following SOQL restrictions. No SOQL limit if logged-in user has View All Data permission. If not, specify a `LIMIT` clause of 1,000 records or fewer. SOQL `ORDER BY` on fields using relationships is not available. Use `ORDER BY` on fields on the root object in the SOQL query.